Building a Stronger Community

The Luzerne Foundation 2017 Annual Report
Celebrating 23 Years of Being... Here for Good.™

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

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Dear Community Friends,

How do we build a stronger community?

You’ve heard the old adage “it takes a village,” well, it takes an entire community, with all of its diverse members working together, to strengthen the community - making it a better place to live... for everyone.

We all play a role in some way, whether big or small, in building up our community. The Luzerne Foundation's role, as a community foundation, is foremost as a philanthropic leader, a financial steward, and a community resource. The Foundation continually strives to bring the community together by promoting nonprofit collaborations and partnerships, providing ongoing professional advisor growth, and most importantly, by teaching our youth the significance of philanthropy and why everyone should “give back.” They are the future philanthropists of our community!

It takes everyone rolling up their sleeves and working together: nonprofit organizations; businesses; public leaders and servants; and all members young and old to ensure that our community continues to grow and flourish. That’s how we build a stronger community.

The Foundation extends a sincere “thank you” to its fund holders, board of directors, friends and donors who strive to strengthen our community each and every day.

Because of all of you, we are...

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. Unlike other organizations, a community foundation is focused on developing funds that will live on into perpetuity providing support to the community for generations to come. That is why we are, Here for Good™.
As the President and senior partner at Hourigan, Kluger & Quinn, Allan Kluger sets a high bar for all the other attorneys on the firm’s Business Team. Usually the first to arrive at the office and the last to leave, Attorney Kluger’s work ethic and commitment to client service is the benchmark by which all of his colleagues measure their own performance. Attorney Kluger is one of Luzerne County’s longest-practicing lawyers, and has been honored numerous times over the years for his service to the bar, including the President’s Award from the Luzerne County Bar Association.

A graduate of Wyoming Seminary and Amherst College, Attorney Kluger joined HKQ after earning his law degree from the University of Pennsylvania Law School in 1952. Today, his practice focuses primarily on business law, wills and estates.

When asked about his tireless work ethic, he jokes, “I flunked the course in sleeping. But seriously, I come in so early because I love what I do and it gives me the opportunity to give the kind of service I want to give to my clients.”

Attorney Kluger was named a Pennsylvania Super Lawyer in 2004 and 2005. He is a member of the Luzerne County, Pennsylvania and American Bar Associations, and served on the Pennsylvania State Ethics Commission from 1991 to 1998 by appointment of the Governor. He serves on numerous boards, including King’s College, where he was recently awarded the Father James Lackenmier, C.S.C., Award for Achievement and Leadership, the Greater Wilkes-Barre Chamber of Business and Industry, and The Luzerne Foundation, of which he is a founding member.

He has been honored with the B’nai B’rith Outstanding Citizen Award, the First Annual Ethics Award given by Ethics Institute of Northeastern Pennsylvania, the Wyoming Seminary Distinguished Service Award, the Anti-Defamation League Distinguished Community Service Award, the Boy Scouts Distinguished Citizen Award, Temple Israel’s Pillar of the Community Award and the Wilkes-Barre Chamber of Commerce Distinguished Citizen Award. He is the recipient, together with his wife, Sue, of the first Lifetime Achievement in Philanthropy Award presented by the Greater Pocono Northeast Chapter of the National Society of Fund Raising Executives.

Allan is an extraordinary community servant, a beloved husband, father and grandfather.

“He who lives without blame, and does what is right, and speaks justly from his heart.”
Psalm 15:1-2

Rabbi Larry Kaplan
Mary Bevevino 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 Bevevino Community Service Award is The Foundation’s highest tribute as this recognition reflects the unwavering dedication, commitment and spirit of its namesake. The 2017 Mary Bevevino Community Service Award is presented to Atty. Allan M. Kluger.

Past Recipients of the Mary Bevevino 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. Bevevino “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*
2011 - David W. Kistler, M.D.*
2012 - Michael & Kathleen Hirthler
2013 - Sisters of Mercy, Dallas, PA
2014 - Founding Board Members of The Luzerne Foundation
2015 - Kathleen Button
2016 - Lorine Angelo Ogurkis

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

Winston S. Churchill

* Deceased
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 gives a chance for nonprofits to explain, from their perspective, their most pressing needs and how they are planning to address them. In selecting each presenter, The Grants Distribution Committee evaluates each of the RFP’s (Request for Proposal) received, then, if chosen, invites the selected nonprofit to make a presentation at the Forum. After careful deliberation, grants are awarded. This year, more than $85,000 has been earmarked for nonprofit organizations that represent one of seven fields of interest: Arts and Culture; Neighborhoods and Community Development; Education; Social Service; Health & Wellness; Historic Preservation and the Environment and Youth Issues. An email notification will be sent to all Luzerne County Nonprofits in January 2018 announcing the date and location of the 2018 Forum.

Opportunities for Professional Advisors

In January of 2017, 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 Donald W. Kramer Chair, Nonprofit Law Group Montgomery, McCracken, Walker & Rhoads, LLP, entitled, “Looking Ahead for Philanthropy.” CLE and CPE credits were offered. Plans are in motion for 2018. 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
These Funds support general purpose, community needs and program grants. Notices of availability are sent to over 800 nonprofits throughout the region in the spring 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” predominantly benefits young people and educational programs within the county.

**Daylene Burnside Administrative Endowment**

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. 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. Since the program’s closure, grants provide continued support to education, environmental preservation, economic development, and encouragement of the Arts in Wilkes-Barre, Scranton and Hazleton areas.

**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. 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.
2016-2017 Youth Advisory Committee (YAC)

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

Beyza Akinci, Wyoming Seminary
Paige Allen, Wyoming Seminary, Student Director
Ryan Anderson, Wyoming Seminary
Lauren Anderson, Wyoming Seminary, Student Leader
Joseph Balay, Hazleton Academy of Sciences
Adrianna Bohman, Hazleton Academy of Sciences
Grayson Butcher, Wyoming Seminary
Reese Butcher, Wyoming Seminary
Haley Fennell, Dallas High School
Brett Gemmell, Hazleton Academy of Sciences
Rebecca Hammerman, Wyoming Seminary
Marissa Jason, Holy Redeemer
Rachel Jones, Holy Redeemer, Student Leader
John Kehl, Wyoming Seminary
Halle Kehl, Wyoming Seminary
Andrew Kovalick, Dallas High School
Mary Madeline Lewis, Holy Redeemer
Marina Malcom, Lake Lehman, Student Leader
Bianca Mazzarella, Holy Redeemer
Olivia Minzola, MMI Preparatory
Ben O’Connell, Dallas, Student Leader
Zachary Palfey, Dallas High School
Megan Panaway, Coughlin
Sophia Polgar, Wyoming Seminary
Luigi Romano, Good Shepherd Academy
Katherine Sklarosky, Crestwood
Isabella Sobejano, Wyoming Seminary
John Toussaint, Jr., Dallas High School
Hannah Wolfe, Dallas High School

$16,000 was awarded collectively on April 30, 2017 to these deserving organizations:

CASA Special Project
St. Joseph’s Center
N.E. Regional Cancer Institute

Helping Hands Society
McGlynn Learning Center
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 by 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 to make 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, LOCAL NEEDS, LOCAL SOLUTIONS

Ron Hillard, Executive Director of the Hope Center making his presentation to the Millennium Circle Membership

Join us for our Annual Luncheon on Thursday, October 26, 2017 beginning at 11:30 PM at Genetti Hotel & Conference Center in Wilkes-Barre.

www.luzfdn.org
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
Charles & Denny Barber Family Fund
Stuart & Carolyn Bell Family Fund... NEW!
Bella Grazia 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
Crisci Family Fund
Darte-Darling Fund
The Dawe Consulting Fund
The Dowd Family Charitable Fund
The David P. Dutko Memorial Fund
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 Krogulski Family Fund
Lefkowitz Family Fund
Logos Fund
The John F. Magagna Family Charitable Fund

The Makarios Fund
The Shawn C. Malone Memorial Fund
The Verna C. Meluskey Memorial Fund... NEW!
The Millennium Circle Fund
The Miner-Shoemaker Fund
The Kristopher David Moules Memorial Fund... NEW!
The Libby K. Morris Remick Fund
The Robert A. Mugford Family Fund
The Palko Family Fund
The Corrine Pawling Family Fund
The Pepperjam Community Fund
John Glenn Popple Memorial Fund
RJ ACK Fund
The Ruckno Family Charitable Fund
Paul & Mary Jo Rushin Fund
Jason Schilling Memorial Fund
The Nancy & Edward Shafer Family Fund
The Shafer Family Fund
Security Savings Charitable Fund
The Dr. Jen’s Hope Fund
The Don J. Shaw Memorial Fund... NEW!
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
The Dallas Days Bicentennial Fund... NEW!
Daylene Burnside Administrative Endowment
Rusty Flack Memorial Garden at Grace Episcopal Church
The Friends of Wintersteen Carousel Fund
FunFest Fund of Greater Hazleton Chamber of Commerce
Georgetown Settlement Camp Fund
Hazleton Integration Project
Irem Temple Restoration & Preservation Fund
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
  The Benjamin P. Turri Athletic Endowment Fund... NEW!
  Benjamino & Ernesta Turri Sr. Faculty Chair Language Fund
  Matilda A. Turri Brown & Adele Turri Hanna Senior Faculty Chair Fund... NEW!

William J. & Constance K. Umphred Fund
Vital House Fund – HASD Fund

Wyoming Valley West School District
  WVW - Athletic Fund
  WVW - Facilities Fund
  WVW - Special Education Fund
  WVW - Technology Fund

Sarah “Sally” Yudichak Endowment Fund
Building a Stronger Community

YAC Youth Advisory Committee

Collaborations

Strategic Grantmaking

Donor Relations

Leadership Development

Visit www.luzfdn.org or call 570.714.1570
Leadership Development

Nonprofit Forums

Scholarships

Legacy Giving

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
Addiction & Recovery Members Ending Drug Abuse Fund(AARMED)... NEW!
The Debbie Darling Belenski Memorial Fund
1st Lieutenant Michael J. Cleary Memorial 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 Fund
The Lou Goeringer Family Fund for the Visually Impaired
Grandparents Raising Grandchildren
HKQ Fund for Children’s Advocacy
Hunts for Healing, Inc.
In Concert With the Arts... NEW!
The Kevin Karl Music Foundation Fund... NEW!
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

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

Organizational Endowments

Back Mountain Recreation Fund Endowment
Bear Creek Historical Society Dam Fund
The Constance L. Bell Library Fund Endowment
Junior League of Wilkes-Barre Fund Endowment
The William G. McGowan Charitable Fund... NEW!
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
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
Lisa Ann Marie Blaum 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 Carlo Book Scholarship Fund
The Brian Cashmere Memorial Scholarship Fund
Robert J. Clark Scholarship Fund
1LT Michael J. Cleary Memorial Scholarship Fund
James Cortegerone 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
The Corey A. Ehret Scholarship Fund... NEW!
Herbert L. Facher Award Fund
The Fallen Swan Scholarship... NEW!
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
The Virginia M. & Robert C. Hopkins Scholarship Fund.. NEW!
The Lila & Darnell Howard Memorial Scholarship Fund
The Kelci Ever After Memorial Scholarship Fund
Mickey Gorham Memorial Blue & Gold Fund
The Kevin Karl Music Foundation Scholarship... NEW!
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
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
The Officer Robert E. Mack WSCTC Law Enforcement Police Science Program Scholarship Fund...NEW!
The Kenneth L. Malkemes, Jr. Memorial Scholarship Fund... NEW!
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
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
The Adam B. Slamas Memorial Scholarship Fund...NEW!
Judith Geer-Spitale Fund
Taylor Nursing and Rehabilitation Center - Health and Wellness Fund
The Charlotte Williams Thomas Award Fund
Wilbur Troy Memorial Scholarship Fund
The Walsh Family Scholarship Fund...NEW!
Kyle Wega Memorial Scholarship Fund
WBGH Auxiliary 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, and your family 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, and 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...

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 group of charitable individuals who have named The Luzerne Foundation as the beneficiary of any type of planned or deferred gift, who wish to be listed. There is no minimum amount needed to qualify and, to date, The Foundation has received bequests or other types of planned gifts ranging from $1,000 to $3,000,000 from The Rusty Flack Society members. These generous gifts help support numerous nonprofit organizations that provide much needed programs and services throughout our community.

The importance of creating a lasting legacy that will continue to have impact for generations is the premise that led Rusty and his family to establish The Flack Family Fund at The Luzerne Foundation as well as the NEPA Philharmonic/Flack Family Fund. “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 a wonderful man and his family and it serves as a reminder of The Foundation’s mission to support the community far into the future.”

Members:

Charles & Denny Barber
Kerron Barnes
Donna Bedwick
Mr. & Mrs. Frank Bevevino
John & Renee Bevevino
Tom & Karen Bevevino
Mr. & Mrs. Joseph Blaum
Leonard Bielski
Joseph & Jeanne Butcher
Marvin Carkhuff
Tom & Millie Cannon
James & Lorraine Cortegerone
Ray & Anne Crisci
John W. Dawe
Ronald & Brenda D’Eliseo
Philip & Judith Decker
Kristin Degnan
Jerome & Vivien Facher
Hal & Jean Flack
Rusty & Kathi Flack
Gus & Val Genetti
Omar & Peggy Hamilton
Mr. & Mrs. Frank M. Henry
Michael & Kathleen Hirthler
Dr. & Mrs. David Kistler
Ken & Ann Krogulski
Andrey T. Kurz
Sandra G. Lefkowitz
Melanie Lumia
John F. Magagna
Dick and Marilyn Maslow
Doug & Michaeleine Maslow
Walter and Connie Mitchell
Rick & Roseanne Nardone
Joan Flack Nusbaum
Joseph & Patrice Persico
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
Bill and Shelly Smulowitz
Charles & Judy Spitalere
Joseph Turri
William J. and Constance M. Umphred
James & Regina Yates
Bob Yocum
John & Heather Yudichak

For more information about the Rusty Flack Society, please contact The Luzerne Foundation at 570-714-1570 or visit www.luzfdn.org.
Special Event Highlights ... 

Millennium Circle of Friends Reunion ~ September 22, 2016 at the Mary Stegmaier Mansion

Rusty Flack Society Event ~ February 8, 2017 at the Westmoreland Club
Friends, Donors, Fundholders and Rusty Flack Society Members
### We’re Committed to Excellence

The Luzerne Foundation works diligently 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.

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!

![Community Accredited Foundation](image)

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.

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### Assets

<table>
<thead>
<tr>
<th>Assets</th>
<th>2014 Audited</th>
<th>2015 Audited</th>
<th>2016 Unaudited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Pass-through Funds</td>
<td>$2,494,084</td>
<td>$3,053,449</td>
<td>$2,692,143</td>
</tr>
<tr>
<td><strong>Endowment Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted - General Purpose</td>
<td>$1,324,202</td>
<td>$1,204,147</td>
<td>$1,230,076</td>
</tr>
<tr>
<td>Donor Advised</td>
<td>$11,084,567</td>
<td>$10,539,646</td>
<td>$10,796,494</td>
</tr>
<tr>
<td>Scholarship Funds</td>
<td>$4,927,838</td>
<td>$4,855,490</td>
<td>$5,446,055</td>
</tr>
<tr>
<td>Field of Interest Funds</td>
<td>$2,082,805</td>
<td>$1,982,536</td>
<td>$2,046,188</td>
</tr>
<tr>
<td>Designated Funds</td>
<td>$2,512,713</td>
<td>$3,435,874</td>
<td>$3,643,306</td>
</tr>
<tr>
<td>Organizational Endowments</td>
<td>$4,386,033</td>
<td>$5,936,817</td>
<td>$6,937,263</td>
</tr>
<tr>
<td><strong>TOTAL ENDOWMENT ASSETS</strong></td>
<td>$26,318,158</td>
<td>$27,954,510</td>
<td>$30,099,382</td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>$21,199</td>
<td>$33,699</td>
<td>$33,699</td>
</tr>
<tr>
<td>CRUT and Gifts Receivable</td>
<td>$383,243</td>
<td>$1,367,075</td>
<td>$1,367,075</td>
</tr>
<tr>
<td>Annuity</td>
<td>0</td>
<td>$161,205</td>
<td>$140,192</td>
</tr>
<tr>
<td>Buildings</td>
<td>$1,070,000</td>
<td>$1,070,000</td>
<td>$1,070,000</td>
</tr>
<tr>
<td>Leasehold Improvements and Equipment</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$30,286,684</td>
<td>$33,639,938</td>
<td>$35,402,491</td>
</tr>
</tbody>
</table>

### Liabilities & Equity

#### Liabilities

<table>
<thead>
<tr>
<th>Liabilities</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>$1,850</td>
<td>$1,533</td>
<td>$20,000</td>
</tr>
<tr>
<td>Payroll Taxes Payable</td>
<td>$7,196</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Funds held as Agency/Organizational Endowments</td>
<td>$4,288,964</td>
<td>$5,936,068</td>
<td>$6,939,708</td>
</tr>
<tr>
<td>Liability Under Unitrusts</td>
<td>0</td>
<td>$673,929</td>
<td>$673,929</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$4,298,010</td>
<td>$6,611,530</td>
<td>$7,633,637</td>
</tr>
</tbody>
</table>

#### Equity

<table>
<thead>
<tr>
<th>Equity</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$24,535,431</td>
<td>$25,265,262</td>
<td>$26,005,708</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>$1,453,243</td>
<td>$1,763,146</td>
<td>$1,763,146</td>
</tr>
<tr>
<td><strong>Total Equity</strong></td>
<td>$25,988,674</td>
<td>$27,028,408</td>
<td>$27,768,854</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; EQUITY</strong></td>
<td>$30,286,684</td>
<td>$33,639,938</td>
<td>$35,402,491</td>
</tr>
</tbody>
</table>
**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></td>
</tr>
<tr>
<td></td>
<td>• Foundation is responsible for asset management</td>
<td>Board of trustees has complete control of grantmaking distributions and responsibility for asset management</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>• Must file annual tax returns including detailed financial schedule (Form 990-PF)</td>
</tr>
<tr>
<td></td>
<td>• Public reporting performed by staff</td>
<td>• Must establish tax exempt status with IRS</td>
</tr>
<tr>
<td></td>
<td>• Director/Officer liability insurance in place</td>
<td>• Must prepare reports for general public</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>• Cash gifts deductible up to 30% of the adjusted gross income (AGI)</td>
</tr>
<tr>
<td></td>
<td>• Gifts of appreciated property deductible at fair market value (up to 30% of AGI)</td>
<td>• Gifts of appreciated property deductible at fair market value (up to 20% of AGI)</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>• Board and staff must do research, due diligence, review and monitor proposals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Board and staff must develop evaluation process</td>
</tr>
</tbody>
</table>

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

By Field of Interest:

- Social Services: 38%
- Arts & Culture: 8%
- Historic Preservation & the Environment: 20%
- Youth Issues: 11%
- Neighborhoods & Community Development: 17%
- Health & Wellness: 2.5%
- Education & Scholarships: 3%

Since Our Inception in 1994 through May 4, 2017:

Total: $118,295,220

- 1994: $0
- 1995: $0
- 1996: $0
- 1997: $0
- 1998: $0
- 1999: $0
- 2000: $0
- 2001: $0
- 2002: $0
- 2003: $0
- 2004: $0
- 2005: $0
- 2006: $0
- 2007: $0
- 2008: $0
- 2009: $0
- 2010: $0
- 2011: $0
- 2012: $0
- 2013: $0
- 2014: $0
- 2015: $0
- 2016: $0
- 2017: $0

The Luzerne Foundation Annual Report

www.luzfdn.org
Dear Friends,

Building a Stronger Community...

Sounds good; sounds noble. But what does a strong community look like? Who are the builders? How do we make this goal a reality?

A strong community is a dynamic process. As communities evolve and the demographics change, so do the needs of the community. Regardless of where we live, certain key markers indicate a strong community:

**Leadership:** A strong community begins and ends with something you can’t fake: trust. From elected officials to community leaders, listening and engaging others in authentic leadership is key and sets a collaborative tone which, in time and in practice, can become a collaborative community culture.

**Community Pride, Parks and Recreation:** Luzerne County offers a very diverse landscape when we consider the beauty of the Susquehanna River and the River Common, historic landmarks, our mountains and our beautiful trails. Regardless of why we are seeking to build our community, we must celebrate its beauty, preserve its history, and serve as good stewards.

**Partnerships:** No one can do it all. No local government possesses the time or resources to improve our community. Instead, the more programs and initiatives delegated from the plates of city government to the often more appropriate “to do” lists of community businesses, institutions, nonprofits, associations, advocates, or willing residents, the better. Not only is this the more fiscally prudent course of action, but it is also a direct form of community engagement and empowerment that further strengthens trust and interdependence.

**Programming:** Neighborhood festivals, concerts on the River Common and other countywide activities are key opportunities for our community to mingle and celebrate, but don’t assume that everything needs to be orchestrated via local government. For every citywide gathering in our downtowns, there’s an equal need for gatherings at the block and neighborhood levels. In fact, the most creative and compelling events are often “roots-up” rather than “top-down.” Community events are also a great way to engage our youth in community service while uniting generations and families to enjoy the beauty of our region.

So how are we doing? Quite well, I believe, but there’s always room to grow! It is no small task to build a stronger community, but The Luzerne Foundation is committed to doing just that ... one brick at a time. That is why we are...

Here for Good™

Charles M. Barber, President & CEO