

# Annual Report 2021-2022



Phoenixville  
Community  
Health Foundation

# Mission

We work to improve the health and quality of life for all people in the greater Phoenixville region by increasing equitable access to quality health and human services and promoting healthy communities through grantmaking and collaboration with health, civic, business, nonprofits, and community partners.

Click on [Vision](#), [Values](#) and [Goals](#) to get more information.

## Board Members

Nick Bucci

Jessica Capistrant, Vice Chair

John Colarusso

Dr. Carlene Allana Denis

Lauren Eustis, Secretary

Jon Ewald

Frank Giardina

Brooke Ginty

Charles Henry, Treasurer

Carolyn Mayinja

Julian McCracken

Barbara O'Connor

Chelsea Perugini

Mike Polin

Maria Schwab, Chair

Theresa Thornton

Dolly Winston

### **Emeritus Members:**

Richard Downs

Richard Kunsch

Jim Reading



## From our Leaders

As COVID began to decline, we were excited to once again be out in the community. We visited several grantees, held our first in-person Grant Kickoff Forum in the spring, attended many events hosted by our nonprofit community, and transitioned our monthly In This Together PXV calls with social service providers to quarterly in-person meetings.

This year saw the launch of our new strategic plan that will guide our work over the next three years. The plan continues to focus on ensuring access to health and human services, affordable housing, and building the capacity of our dedicated nonprofits. In response to the growing mental health crisis, our plan has a new goal to help ensure access to timely mental health and substance abuse services, especially crisis intervention. We hosted a convening in mid-July to connect those providing mental health services with those providing human services and identify service gaps. We plan to host a second convening in early 2023.

Our strategic plan also identifies two threads that will weave through our work: diversity, equity, and inclusion and Trust-Based Philanthropy. You will see those threads throughout this annual report.

When our investments rise in value, we have more grant dollars to distribute. We were fortunate this past fiscal year to see an increase in our portfolio which allowed us to fund 66 organizations through our annual grant cycle. The extra revenue also allowed us to be there for those in Mont Clare and Port Providence affected by Hurricane Ida; we contributed more than \$300,000 so homeowners could repair and restore the infrastructure in their houses.

Read this annual report for additional accomplishments and programs. We look forward to continuing to work with you to make Phoenixville one of the healthiest communities in Pennsylvania.

In gratitude,

Tamela Luce, President & CEO

Jessica Capistrant, Board Chair



Tamela Luce, CEO &  
President



Jessica Capistrant,  
Chair



# Accomplishments

## 2022-2024 Strategic Plan

The Phoenixville Community Health Foundation (PCHF) launched a new strategic plan that will guide our work for the next three years. We conducted a thorough planning process including research, surveys, and interviews with stakeholders and residents to better understand current community needs; facilitated discussions on diversity, equity, and inclusion; and affirmed that we are in the process of adopting many of the principles of trust-based philanthropy.

To read our strategic goals and full plan [click here](#).



## New Capacity Building Programs for Nonprofits

PCHF took the time to reevaluate our capacity building programs by listening to our nonprofit professionals during the early months of 2021. Viviann Schorle put together the new program starting in August 2021. Most of our presenters were new to our nonprofit professionals and Zoom allowed us to tap into high-quality trainers. Our sessions included monthly giving and fundraising coaching, inclusive leadership and feedback, Executive Director/CEO peer learning circles, and Cultural Humility 102. We also offered support to nonprofit organizations' board members with succession planning, fundraising, and DEI.

**Total people that attended: 137**



## Scholarships

We presented 7 students with our 2022 Phoenixville Community Foundation Scholarships. High School seniors in our area may apply for this scholarship to pursue higher degrees in health care and human services.



# Accomplishments

## BeHeard BeHealthy

What is BeHeard BeHealthy PA?

PHAN (Pennsylvania Health Access Network) has embarked on a two-year plan to listen to the voices of people throughout our state-particularly those from marginalized communities who are too often not heard. PCHF worked with 9 local organizations to survey 55 community members from the Greater Phoenixville area.

Some of the main takeaways from the survey were:

About 2/3 of respondents to the survey indicated they have medical health coverage. Reasons for not having coverage are mostly due to immigration status, lack of coverage through an employer, and costs/affordability.

Social Determinants of Health (SDOH) were the most needs recorded over the past 12 months: accessing emergency support services, access to healthy food, housing, paying for utilities, and employment.

Immigration status as a barrier to accessing insurance (and treatment beyond a general checkup) is also a significant barrier in the community.

## Youth and Philanthropy

This program is designed to provide students in the greater Phoenixville area with an opportunity to learn about philanthropy and giving of one's self to address the needs of others. Y&P students are learning philanthropic, leadership, assessment, collaboration, decision-making skills, and teamwork. The total budget for this program is \$32,000.

The participating schools were:

Renaissance Academy Charter School, 8th grade, Phoenixville Area Middle School, 8th grade, Arcola Youth and Philanthropy, 8th grade, Methacton School District, and Owen J Roberts Middle School, 8th grade, OJRSD.

42 students participated in this program. They researched the nonprofits by using the Help Book, explored websites, did site visits, zoomed in with organization leaders, and talked about personal experiences of past support. Once they researched the organizations, they voted on which organization or topics they wanted to fund.

***A lesson learned this year was:***

*"We were able to go out into the community for the visits to non-profits again, which was great!"*

**BeHeard BeHealthy Initiative**

Phoenixville Community Health Foundation

When decisions are made that affect our communities health, the voices of people throughout our state-particularly those from marginalized communities-are too often not heard. BeHeard BeHealthy, PA is creating a new way for communities across Pennsylvania to make their voices heard.

Kicking off in August 2021

We are happy to announce our community partners in this initiative are:

ORION Communities, Phoenixville Area Senior Center, Phoenixville Area Citizen Advocacy, The Clinic, Whitehall Apartments, Phoenixville Borough Recreation Department, En Familia, Phoenixville Communities That Care

For more information go to PCHF website, [www.pchf.org](http://www.pchf.org)

Feel the Connection

**THANK YOU FOR BEING OUR PARTNERS!**

**ORION COMMUNITIES, ALIANZAS DE PHOENIXVILLE, PHOENIXVILLE AREA SENIOR CENTER, CITIZEN ADVOCACY, THE CLINIC, WHITEHALL APARTMENTS FOR VETERAN, PHOENIXVILLE BOROUGH RECREATION DEPARTMENT, AND PHOENIXVILLE COMMUNITIES THAT CARE.**



Phoenixville Youth and Philanthropy, PAMS



# Who do we serve

PCHF asked specific questions during the 2021 main grant cycle. We were able to learn about the community we serve and how our grant support makes an impact.

Let's share what we learned.

**94,467**

58 organizations provided us with the numbers served per year. We collectively impacted close to 100,000 community members through the support we give.

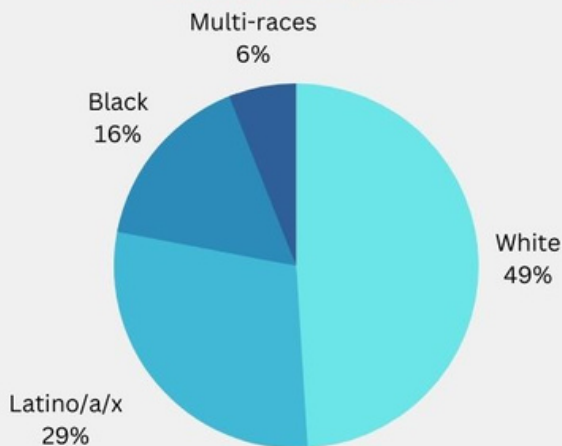


35 organizations let us know that they primarily serve low-income Greater Phoenixville community members.

Who do the programs we fund serve?



According to 33 organizations that shared this information with PCHF, 49% of clients are White, and 51% are Communities of Color.



# Funding

## Grants

Improvements to our processes

- PCHF moved all of our grants (main grant application, mini-grants, special grants, Youth and Philanthropy, and Spanish language application) to our online portal. PCHF can use Foundant for the whole process from beginning to end (application, payment tracking, and final reports).
- PCHF shortened our main grant application to cut down on the amount of time and information grantees needed to provide to be considered for grants.
- PCHF changed the way grantees can do their final report. We gave the option this year of a Zoom interview with PCHF staff. Staff filled out the final report form on behalf of the organization. We still offered the traditional written final report format. Fifty percent of our grantees completed their 2021-2022 final report via a Zoom conversation.

We awarded a total of \$1,764,717 in grants to 66 organizations during our annual grant cycle in September 2021. We reviewed and updated our grant application to make it shorter and clearer for organizations to seek support from our Foundation. We want to continuously work to develop relationships and build a social safety net for our community.

All of these organizations serve the greater Phoenixville area and address one or more of the goals in our strategic plan. A grant committee comprised of board and staff members thoroughly reviewed all proposals and made funding recommendations to the full board for discussion and approval. To go to the organization's website click on the name.

For the complete list of 2021-2022 Main Grantees [click here](#).



Chester County Futures, Graduates 2022



Phoenixville Area Police Athletic League boxing program



Good works helping a Phoenixville homeowner.



# Funding

## Mini-grants

PCHF granted 26 mini-grants during the 2021-2022 fiscal year, totaling \$50,527

### They were for:

12 capacity building mini-grants that included supporting leadership and DEI training, strategic planning, and local program support.

7 information technology mini-grants that included grant interface software, library mobile program cart, and laptop acquisition. 2 AED for a local rugby club and a childcare center.

6 health education grants that supported flexible seating, gym equipment for an elementary school, and fire prevention and training materials.

## Special Grants

- Trellis for Tomorrow year one in support of a Director of Development position-\$62,143
- Ann's Heart 2nd year in support of a Director of Development position-\$40,000
- Phoenixville Area Community Services 2nd and 3rd year, matching grant for purchasing the building at 101 Buchanan Street, Phoenixville, PA \$250,000



West Vincent Elementary School flexible seating to aid with deep breathing and meditation



Participant in Alianzas de Phoenixville Leadership Academy and Support (ALAS)



Kimberton Fire Company Community Day Summer 2022



# Mont Clare-Hurricane Ida

The remnants of hurricane Ida slammed the Delaware Valley on September 1st and produced a two-mile disaster zone in Mont Clare and Port Providence. Flood waters from the Schuylkill River filled approximately 150 homes with 8-10 feet of water, with some taking in as much as 16 feet. The immediate need, however, was to clean and stabilize their home, reestablish electricity and water, and ensure that key equipment was functional. Grants of \$300,000 to Open Hearth and \$15,000 to Jacyees were awarded to assist residents to clean and stabilize their homes, including reestablishing electricity and water and repairing or replacing key building equipment and systems. Fifty four families were helped to repair and restore the infrastructure in their homes.

## ***A note of thanks***

*Dear Friends:*

*This has been the hardest thing we have ever encountered in the past 42 years living in Port Providence. We have been flooded before but never on our 1st floor impacting our living space. This has created a whole other level of trauma for us that has been so difficult to deal with emotionally and financially.*

*The physical support, donated supplies and the offering of medical support we have received from our local community; Upper Providence Township and the greater Phoenixville area, has been overwhelming. It has helped us immensely and gotten us past some of those darkest moments working through this.*

*The financial support facilitated through the Phoenixville Office of Emergency Management has been a "God send." The funds provided have helped us in rebuilding the infrastructure of our home enabling heat, clean water, walls, and a safe environment for us to move forward.*

*Everyday something is getting done and although it is a slow process, we are making good progress. We are living in our home and are very thankful we have such wonderful support from our family, friends and especially our newfound friends from the greater Phoenixville area. All of you have helped with restoring our home and livelihood. We will be forever grateful.*

*Thank you,*

*Dan & Betsy Daley*

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July 13, 2022

Dear [redacted]  
Today we celebrate eight weeks of being back home! Reflecting on our "adventure" we want to thank all who helped us get here. Our thank you is simply a card + this small gift, although you deserve so much more!

Thank you for being our emotional support, & we appreciated your guidance during the chaos. Thank you for helping with our massive amount of clothes! You introduced us to [redacted] + [redacted] - they also are great to us!

Most helpful was getting our truck repaired so we felt safe to drive it.

May God bless you for all the good you did for us, but also for the good

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You do for our community  
Thank you. [redacted]

I want to add to [redacted] remarks by saying we are very blessed you entered our lives. The support and encouragement you have and are giving us is wonderful. I hope also you get a kick out of my cartoon book. One we are settled I plan to begin a new book and market my cartoon strip.

Our gratitude,

[redacted]  
Woof! Woof!

[redacted]  
[redacted]

# PCHF Financial

PCHF was formed in 1997 after the sale of the Phoenixville Hospital to Penn Medicine. The endowment, formed from the sale, is invested and carefully managed. The endowment provides PCHF with grant dollars and operating funds. We do not fundraise. With the onset of COVID in 2020, and the significant job loss that followed, no one knew what the economic impact would be. However, with additional unemployment funds and stimulus checks, the economy boomed, and our investments grew. On July 1, 2021, PCHF investments had grown significantly, which left PCHF with a healthy grant budget. When Hurricane Ida severely flooded Mont Clare and Port Providence, the Foundation had emergency grant funds of more than \$300,000 available for immediate assistance.

Jeanette Hall  
Director of Finance and Operations

Grant Summary 2021-2022	
Total Number of Grants Made	214
Major Grants Paid	\$ 2,353,960
Health Care Scholarships	\$ 36,000
Health Education Mini-Grants	\$ 4,500
Capacity Building Mini-Grants	\$ 12,400
AED Mini-Grants	\$ 4,421
IT Capacity Building Grants	\$ 29,206
Champions of the Community Grants (a)	\$ -
Board and Staff Matching Grants	\$ 20,629
<b>Total Grant Paid</b>	<b>\$ 2,461,116</b>

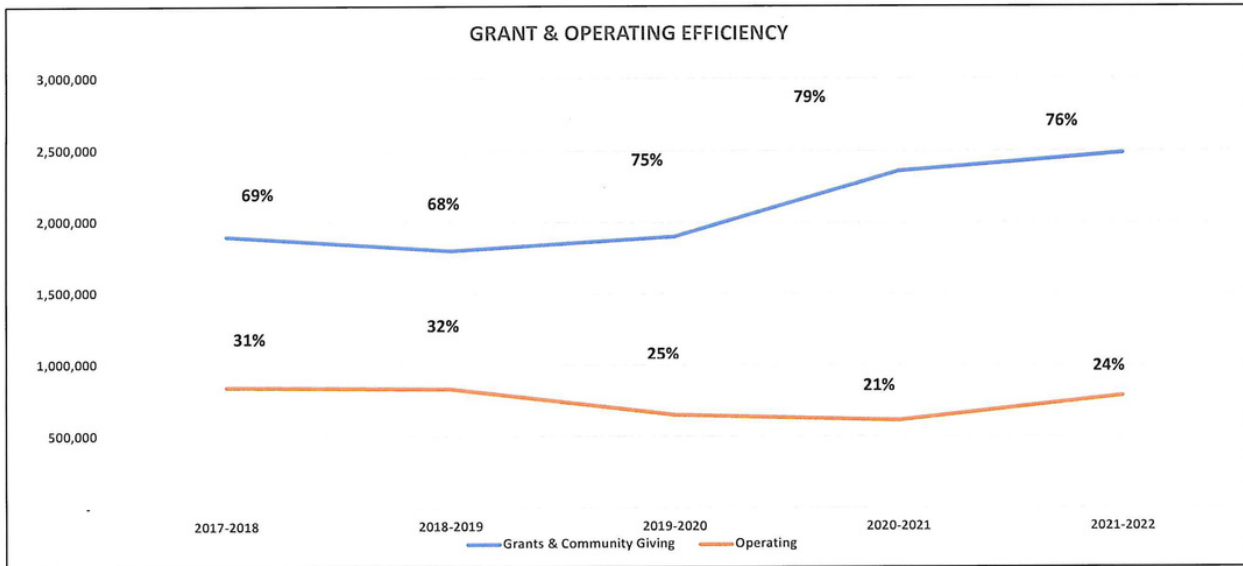
Consolidated Statements of Financial Position			Consolidated Statements of Activities		
June 30, 2021 and 2022			June 30, 2021 and 2022		
	2022	2021		2022	2021
<b>Assets</b>			<b>Revenues</b>		
Cash & Cash Equivalents	\$ 435,462	\$ 480,700	Investment Income	\$ (10,683,029)	\$ 15,744,519
Marketable Securities	\$ 52,415,587	\$ 66,325,790	Other	\$ 13,250	\$ 72,730
Property & Equipment, net	\$ 537,971	\$ 563,823	Total Revenue	<u>\$ (10,669,779)</u>	<u>\$ 15,817,249</u>
Other	\$ 11,002	\$ 6,504			
Total Assets	<u>\$ 53,400,022</u>	<u>\$ 67,376,817</u>	<b>Expenses</b>		
<b>Liabilities and Net Assets</b>			Grants (b)	\$ 2,461,116	\$ 2,355,171
Total Liabilities	\$ 21,967	\$ 30,500	Administrative & General	\$ 837,367	\$ 654,926
<b>Net Assets</b>			Total Expenses	<u>\$ 3,298,483</u>	<u>\$ 3,010,097</u>
Unrestricted	\$ 51,310,723	\$ 65,278,985	Revenues Over (Under) Expenses	<u>\$ (13,968,262)</u>	<u>\$ 12,807,152</u>
Temporarily Restricted	\$ -	\$ -			
Permanently Restricted	\$ 2,067,332	\$ 2,067,332			
Total Net Assets	<u>\$ 53,378,055</u>	<u>\$ 67,346,317</u>			
Total Liabilities & Net Assets	<u>\$ 53,400,022</u>	<u>\$ 67,376,817</u>			

(a) There was no Champions of the Community event due to COVID

(b) Dollar amount of grants awarded from July 1, 2021 through June 30, 2022.



# PCHF Financial



In accordance with IRS regulations, the Foundation must spend 5% of the value of its assets each year in grants and grantmaking activity, which includes our operating expenses. Following the IRS guidelines also keeps the Foundation on target for existence through perpetuity. Grant making activity includes the costs of programs, grant review and processing, community support, and administration. PCHF makes a conscious effort toward lowering administrative costs, which increases funds for grants and community giving.

