

EXTENSION GRANTED TO MAY 15, 2018

Form 990-PF

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public.

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning JUL 1, 2016, and ending JUN 30, 2017

Name of foundation
PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
821 GAY STREET

City or town, state or province, country, and ZIP or foreign postal code
PHOENIXVILLE, PA 19460

6 Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 50,635,762.**
J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify)

A Employer identification number
23-2912035

B Telephone number
6109179890

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	12,825.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,282,446.	1,282,446.	1,282,446.	STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	883,586.			
	b Gross sales price for all assets on line 6a	3,478,787.			
	7 Capital gain net income (from Part IV, line 2)		883,586.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	2,178,857.	2,166,032.	1,282,446.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	167,004.	33,401.	0.	133,603.
	14 Other employee salaries and wages	234,898.	46,980.	0.	187,918.
	15 Pension plans, employee benefits	60,345.	12,069.	0.	48,276.
	16a Legal fees STMT 2	15,568.	3,114.	0.	12,454.
	b Accounting fees STMT 3	48,055.	9,611.	0.	38,444.
	c Other professional fees STMT 4	21,895.	4,379.	0.	17,516.
	17 Interest				
	18 Taxes STMT 5	45,922.	9,184.	0.	36,738.
	19 Depreciation and depletion	29,285.	0.	29,285.	
	20 Occupancy	66,656.	13,494.	0.	53,978.
	21 Travel, conferences, and meetings	13,080.	2,616.	0.	10,464.
	22 Printing and publications	2,580.	516.	0.	2,064.
	23 Other expenses STMT 6	166,127.	33,227.	0.	132,900.
	24 Total operating and administrative expenses. Add lines 13 through 23	871,415.	168,591.	29,285.	674,355.
	25 Contributions, gifts, grants paid	2,136,108.			2,136,108.
	26 Total expenses and disbursements. Add lines 24 and 25	3,007,523.	168,591.	29,285.	2,810,463.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-828,666.				
b Net investment income (if negative, enter -0-)		1,997,441.			
c Adjusted net income (if negative, enter -0-)			1,253,161.		

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	359,581.	866,166.	866,165.	
	2 Savings and temporary cash investments				
	3 Accounts receivable ▶ 30,000.				
	Less: allowance for doubtful accounts ▶		30,000.	30,000.	
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges	5,022.	13,409.	13,409.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock STMT 9	37,761,316.	36,874,794.	36,874,794.	
	c Investments - corporate bonds STMT 10	8,597,519.	12,213,344.	12,213,344.	
Liabilities	11 Investments - land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment: basis ▶ 954,246.				
	Less: accumulated depreciation STMT 8 ▶ 295,668.	688,394.	658,578.	638,050.	
	15 Other assets (describe ▶ STATEMENT 11)	2,822,620.	2,235,293.	0.	
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	50,234,452.	52,891,584.	50,635,762.	
	17 Accounts payable and accrued expenses	64,784.	12,182.		
	18 Grants payable	389,500.	285,000.		
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
	23 Total liabilities (add lines 17 through 22)	454,284.	297,182.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31				
	24 Unrestricted	47,711,656.	50,526,990.		
	25 Temporarily restricted	1,180.	80.		
	26 Permanently restricted	2,067,332.	2,067,332.		
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg., and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
	30 Total net assets or fund balances	49,780,168.	52,594,402.		
	31 Total liabilities and net assets/fund balances	50,234,452.	52,891,584.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	49,780,168.
2 Enter amount from Part I, line 27a	2	-828,666.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	3,642,900.
4 Add lines 1, 2, and 3	4	52,594,402.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	52,594,402.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a VANGUARD 2 CENTURY	P	11/11/11	06/30/17
b VANGUARD FOUNDATION	P	11/11/11	06/30/17
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 343,097.		264,172.	78,925.
b 3,135,690.		2,331,029.	804,661.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			78,925.
b			804,661.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	883,586.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	0.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	3,088,507.	49,384,493.	.062540
2014	3,065,085.	53,224,698.	.057588
2013	2,731,013.	54,064,852.	.050514
2012	2,180,044.	52,311,646.	.041674
2011	1,960,878.	45,750,056.	.042861

2 Total of line 1, column (d)	2	.255177
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.051035
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	49,926,032.
5 Multiply line 4 by line 3	5	2,547,975.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	19,974.
7 Add lines 5 and 6	7	2,567,949.
8 Enter qualifying distributions from Part XII, line 4	8	2,810,463.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.
Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 **Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2016 estimated tax payments and 2015 overpayment credited to 2016

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 **Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

11 Enter the amount of line 10 to be: **Credited to 2017 estimated tax** **Refunded**

1	19,974.
2	0.
3	19,974.
4	0.
5	19,974.
6a	21,920.
6b	
6c	
6d	
7	21,920.
8	
9	
10	1,946.
11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions) STATEMENT 12 STMT 13	11 X	
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.PCHF1.ORG	13 X	
14 The books are in care of ► LOUIS J. BECCARIA, PHD Telephone no. ► 6109179890 Located at ► 821 GAY STREET, PHOENIXVILLE, PA ZIP+4 ► 19460		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

☒

5b

X

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LOUIS BECCARIA 821 GAY STREET PHOENIXVILLE, PA 19460	PRESIDENT 40.00	167,004.	9,241.	11,802.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CAROL POINIER - 821 GAY STREET, PHOENIXVILLE, PA 19460	VP OF ADMINISTRATION 40.00	98,775.	5,400.	9,249.
LYNN PIKE HARTMAN - 821 GAY STREET, PHOENIXVILLE, PA 19460	VP OF PROGRAMS 40.00	96,266.	5,181.	9,121.

Total number of other employees paid over \$50,000

0

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Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A**Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B**Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	47,345,294.
b	Average of monthly cash balances	1b	403,752.
c	Fair market value of all other assets	1c	2,937,281.
d	Total (add lines 1a, b, and c)	1d	50,686,327.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	50,686,327.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	760,295.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	49,926,032.
6	Minimum investment return. Enter 5% of line 5	6	2,496,302.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	2,496,302.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	19,974.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	19,974.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,476,328.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,476,328.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,476,328.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,810,463.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,810,463.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	19,974.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,790,489.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				2,476,328.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				45,333.
d From 2014				477,178.
e From 2015				663,056.
f Total of lines 3a through e	1,185,567.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 2,810,463.				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				2,476,328.
e Remaining amount distributed out of corpus	334,135.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	1,519,702.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	1,519,702.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				45,333.
c Excess from 2014				477,178.
d Excess from 2015				663,056.
e Excess from 2016				334,135.

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ACADEMIC SCHOLARSHIP GRANTS SEE ATTACHED SEE ATTACHED, PA 19460	NONE		ACADEMIC SCHOLARSHIP GRANTS	47,000.
AED PURCHASE MINI GRANT SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR AED PURCHASE	4,500.
CAPACITY BUILDING MINI GRANT SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR DEVELOPMENT OF STRATEGIC PLAN	3,000.
CHAMPIONS OF THE COMMUNITY GRANTS SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR PHOENIXVILLE OUTREACH	8,000.
GENERAL GRANTS SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR GENERAL OPERATING EXPENSES	2,137,103.
Total SEE CONTINUATION SHEET(S) ▶ 3a				2,242,908.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HEALTH EDUCATION MINI GRANT SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR HEALTH EDUCATION	5,152.
INTERNET TECHNOLOGY CAPACITY BUILDING GRANTS SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR IT CAPACITY BUILDING	10,000.
L.L. BEAN OUTDOOR EXPERIENCE MINI GRANT SEE ATTACHED SEE ATTACHED, PA 19460	NONE		SUPPORT FOR OUTDOOR EDUCATION TRIPS	1,100.
MATCH CONTRIBUTION SEE ATTACHED SEE ATTACHED, PA 19460	NONE		MATCH CONTRIBUTIONS	27,053.
Total from continuation sheets				43,305.

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Name of the organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

23-2912035

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line-2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization	Employer identification number
PHOENIXVILLE COMMUNITY HEALTH FOUNDATION	23-2912035

Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	PHOENIXVILLE HOSPITAL 140 NUTT ROAD PHOENIXVILLE, PA 19460	\$ 6,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION**23-2912035****Part II Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION**23-2912035****Part III**

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SECURITIES	1,282,446.	0.	1,282,446.	1,282,446.	1,282,446.
TO PART I, LINE 4	1,282,446.	0.	1,282,446.	1,282,446.	1,282,446.

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	15,568.	3,114.	0.	12,454.
TO FM 990-PF, PG 1, LN 16A	15,568.	3,114.	0.	12,454.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	48,055.	9,611.	0.	38,444.
TO FORM 990-PF, PG 1, LN 16B	48,055.	9,611.	0.	38,444.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER PROFESSIONAL FEES	21,895.	4,379.	0.	17,516.
TO FORM 990-PF, PG 1, LN 16C	21,895.	4,379.	0.	17,516.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAXES	29,441.	5,888.	0.	23,553.	
REAL ESTATE TAXES	9,354.	1,871.	0.	7,483.	
FEDERAL EXCISE TAX	7,127.	1,425.	0.	5,702.	
TO FORM 990-PF, PG 1, LN 18	45,922.	9,184.	0.	36,738.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADOPT A FAMILY	2,513.	503.	0.	2,010.	
BANK FEES	160.	32.	0.	128.	
BOARD MEETING EXPENSES	8,974.	1,795.	0.	7,179.	
COMMUNITY RELATIONS	16,874.	3,375.	0.	13,499.	
DUES AND SUBSCRIPTIONS	2,493.	499.	0.	1,994.	
GRANT ANALYSIS	12,045.	2,409.	0.	9,636.	
INSURANCE	7,274.	1,455.	0.	5,819.	
MANAGEMENT FEES	48,536.	9,707.	0.	38,829.	
MEMBERSHIP DUES	4,019.	804.	0.	3,215.	
MISCELLANEOUS EXPENSES	275.	55.	0.	220.	
OFFICE SUPPLIES	15,066.	3,013.	0.	12,053.	
PAYROLL SERVICES	1,824.	365.	0.	1,459.	
POSTAGE	2,796.	559.	0.	2,237.	
PROGRAM EVALUATION	7,914.	1,583.	0.	6,331.	
PROGRAM SUPPORT	8,170.	1,634.	0.	6,536.	
REPAIRS AND MAINTENANCE					
EQUIPMENT	10,000.	2,000.	0.	8,000.	
SECURITY	240.	48.	0.	192.	
STAFF DEVELOPMENT	2,782.	556.	0.	2,226.	
TELEPHONE & INTERNET	6,053.	1,211.	0.	4,842.	
TRASH, WATER, SEWER	936.	187.	0.	749.	
UTILITIES	6,593.	1,319.	0.	5,274.	
CLERICAL SUPPORT	590.	118.	0.	472.	
TO FORM 990-PF, PG 1, LN 23	166,127.	33,227.	0.	132,900.	

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 7

DESCRIPTION	AMOUNT
UNREALIZED GAINS	3,446,226.
INCOME FROM SUBSIDIARY - UNREALIZED	196,674.
TOTAL TO FORM 990-PF, PART III, LINE 3	3,642,900.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
BUILDING	725,000.	156,475.	568,525.	568,525.
LANDSCAPING-SCHNATZ & ROHRER	2,691.	716.	1,975.	1,975.
CURBING-PAUL R. SAVILLE	8,500.	2,268.	6,232.	6,232.
NEW ROOF-GSM ROOFING	33,300.	6,660.	26,640.	26,640.
DIAMOND QUALITY BUILDERS SPECTRUM	13,519.	2,704.	10,815.	10,815.
OFFICE FURNITURE	622.	622.	0.	0.
OFFICE DESK SET	558.	558.	0.	0.
RT WORK-DESIGN OF PCH	1,109.	1,109.	0.	0.
ART WORK	8,500.	8,500.	0.	0.
DESKS	450.	450.	0.	0.
ART WORK	2,869.	2,869.	0.	0.
ART WORK	2,760.	2,760.	0.	0.
ART WORK	370.	370.	0.	0.
ART WORK	574.	574.	0.	0.
OFFICE FURNITURE	2,168.	2,168.	0.	0.
REFRIGERATORS	457.	457.	0.	0.
OFFICE FURNITURE	315.	315.	0.	0.
FILING CABINET	777.	777.	0.	0.
DESK & TABLE ED OFFICE CHAIR	1,993.	1,993.	0.	0.
FILE CABINET	504.	504.	0.	0.
AED	622.	622.	0.	0.
CONFERENCE ROOM TABLE, RUG	1,595.	1,595.	0.	0.
WINDOW TREATMENT DEPOSIT	12,312.	12,312.	0.	0.
CHAIR DEPOSIT	4,500.	4,500.	0.	0.
LAMP PURCHASE	3,100.	3,100.	0.	0.
RUG PURCHASE	1,075.	1,075.	0.	0.
RUG PURCHASE	3,356.	3,356.	0.	0.
WINDOW TREATMENTS	1,194.	1,194.	0.	0.
RUG PURCHASE	7,927.	7,927.	0.	0.
PRESIDENTS OFFICE, PROGRAM OFFICER OFFICE	985.	985.	0.	0.
TELEPHONE SYSTEM	8,902.	8,902.	0.	0.
	5,135.	5,135.	0.	0.

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

23-2912035

OFFICE COPIER	6,145.	6,145.	0.	0.
RUGS, LAMPS	6,863.	6,863.	0.	0.
FILING CABINET	1,558.	1,558.	0.	0.
2 FILE CABINETS	994.	994.	0.	0.
RUGS	1,734.	1,734.	0.	0.
SECURITY CAMERA	1,303.	1,303.	0.	0.
BOOK CASE	789.	789.	0.	0.
LJB WINDOW TREATMENTS	1,100.	1,100.	0.	0.
SIGNAGE	4,025.	4,025.	0.	0.
ELAND GALLERY				
PAINTING-DOWNSTAIRS				
BATHROOM	300.	300.	0.	0.
SHADE FOR PRES OFFICE	1,088.	1,088.	0.	0.
OFFICE COPIER 2ND FLOOR				
XPO	1,298.	1,298.	0.	0.
COMPUTER EQUIP	1,525.	1,525.	0.	0.
COMPUTER EQUIP	1,343.	1,343.	0.	0.
COMPUTER EQUIP	3,426.	3,426.	0.	0.
COMPUTER EQUIP	1,791.	1,791.	0.	0.
LATERAL FILES	1,866.	1,866.	0.	0.
LATERAL FILES	1,749.	1,749.	0.	0.
FLAG POLE	1,355.	1,355.	0.	0.
LED OUTDOOR PATHWAY				
LIGHTS	6,050.	6,050.	0.	0.
OVERHEAD PROJECTOR	2,969.	2,969.	0.	0.
DELL OFFICE COMPUTERS &				
INSTALLATION	11,761.	11,761.	0.	0.
LED PATH LIGHTS	4,719.	4,719.	0.	0.
RESEOURCE PARTNERS	1,968.	1,772.	196.	196.
RUG-CHES-MONT CARPET ONE	2,296.	1,607.	689.	689.
SHELVING FOR BASEMENT	688.	688.	0.	0.
SHUTTERS (CAROLS OFFICE	3,010.	1,104.	1,906.	1,906.
DELL COMPUTER (CAROL)	863.	173.	690.	690.
HP PRINTER	530.	106.	424.	424.
NEW ROOF-GSM ROOFING				
(FINAL)	14,606.	1,785.	12,821.	12,821.
HVAC SYSTEM	7,325.	188.	7,137.	7,137.
TO 990-PF, PART II, LN 14	954,776.	316,726.	638,050.	638,050.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCK	36,874,794.	36,874,794.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	36,874,794.	36,874,794.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	12,213,344.	12,213,344.
TOTAL TO FORM 990-PF, PART II, LINE 10C	12,213,344.	12,213,344.

FORM 990-PF	OTHER ASSETS	STATEMENT	11
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN SUBSIDIARY	2,822,620.	2,235,293.	0.
TO FORM 990-PF, PART II, LINE 15	2,822,620.	2,235,293.	0.

FORM 990-PF TRANSFERS FROM CONTROLLED ENTITIES STATEMENT 12
PART VII-A, LINE 11

NAME OF CONTROLLED ENTITY

EMPLOYER ID NO

CHES-MONT VALLEY VENTURES, INC.

23-2508198

ADDRESS

821 GAY STREET
PHOENIXVILLE, PA 19460

DESCRIPTION OF TRANSFER

DIVIDEND ON PREFERRED STOCK

AMOUNT
OF TRANSFER

52,250.

NAME OF CONTROLLED ENTITY

EMPLOYER ID NO

PHOENIXVILLE MEDICAL BUILDING ASSOCIATES

23-2545718

ADDRESS

824 MAIN STREET, SUITE 350
PHOENIXVILLE, PA 19460

DESCRIPTION OF TRANSFER

NO TRANSFERS WERE MADE TO OR FROM THIS ENTITY DURING THE YEAR.

AMOUNT
OF TRANSFER

0.

TOTAL AMOUNT OF TRANSFERS FROM CONTROLLED ENTITIES

52,250.

FORM 990-PF

LIST OF CONTROLLED ENTITIES
PART VII-A, LINE 11

STATEMENT 13

NAME OF CONTROLLED ENTITY

EMPLOYER ID NO

CHES-MONT VALLEY VENTURES, INC.

23-2508198

ADDRESS

EXCESS BUSINESS HOLDING [] YES [X] NO

821 GAY STREET
PHOENIXVILLE, PA 19460

NAME OF CONTROLLED ENTITY

EMPLOYER ID NO

PHOENIXVILLE MEDICAL BUILDING ASSOCIATES

23-2545718

ADDRESS

EXCESS BUSINESS HOLDING [] YES [X] NO

824 MAIN STREET, SUITE 350
PHOENIXVILLE, PA 19460

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTEDCAROL POINIER
821 GAY STREET
PHOENIXVILLE, PA 19460TELEPHONE NUMBER

610-917-9890

FORM AND CONTENT OF APPLICATIONSTHE FOUNDATION HAS DEVELOPED A GRANT APPLICATION FORM WHICH MAY BE
REQUESTED OR DOWNLOADED FROM THE INTERNET.ANY SUBMISSION DEADLINESGRANT REQUESTS MUST BE RECEIVED AT LEAST 6 WEEKS PRIOR TO SCHEDULED GRANT
MAKING MEETINGS.RESTRICTIONS AND LIMITATIONS ON AWARDSTHE FOUNDATION SERVES 501(C)(3) ORGANIZATIONS/PUBLIC CHARITIES WHICH
SUPPORT COMMUNITY OR PERSONAL HEALTH AND IS LIMITED TO 19 MUNICIPALITIES IN
THE GREATER PHOENIXVILLE AREA.

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	BUILDING	01/01/10	SL	39.00	MM	16	725,000.				725,000.	137,885.		18,590.	156,475.
2	LANDSCAPING-SCHNATZ & ROHRER	06/05/08	SL	15.00		16	2,691.				2,691.	537.		179.	716.
3	CURBING-PAUL R. SAVILLE	10/14/11	SL	15.00		16	8,500.				8,500.	1,701.		567.	2,268.
4	NEW ROOF-GSM ROOFING	12/30/14	SL	15.00		16	33,300.				33,300.	4,440.		2,220.	6,660.
5	DIAMOND QUALITY BUILDERS	12/30/14	SL	15.00		16	13,519.				13,519.	1,803.		901.	2,704.
6	SPECTRUM	10/13/06	SL	5.00		16	622.				622.	622.		0.	622.
7	OFFICE FURNITURE	12/15/98	SL	7.00		16	558.				558.	558.		0.	558.
8	OFFICE DESK SET	10/02/98	SL	7.00		16	1,109.				1,109.	1,109.		0.	1,109.
9	RT WORK-DESIGN OF PCH	06/30/98	SL	5.00		16	8,500.				8,500.	8,500.		0.	8,500.
10	ART WORK	09/30/98	SL	5.00		16	450.				450.	450.		0.	450.
11	DESKS	10/30/98	SL	7.00		16	2,869.				2,869.	2,869.		0.	2,869.
12	ART WORK	10/30/98	SL	5.00		16	2,760.				2,760.	2,760.		0.	2,760.
13	ART WORK	11/12/98	SL	5.00		16	370.				370.	370.		0.	370.
14	ART WORK	12/15/98	SL	5.00		16	574.				574.	574.		0.	574.
15	OFFICE FURNITURE	04/15/99	SL	7.00		16	2,168.				2,168.	2,168.		0.	2,168.
16	REFRIGERATORS	10/15/99	SL	5.00		16	457.				457.	457.		0.	457.
17	OFFICE FURNITURE	05/31/11	SL	7.00		16	315.				315.	315.		0.	315.
18	FILING CABINET	10/18/04	SL	5.00		16	777.				777.	777.		0.	777.

828111 04-01-16

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2016 DEPRECIATION AND AMORTIZATION REPORT

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Asset No	Description	Date Acquired	Method	Life	Convention	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
19	DESK & TABLE ED OFFICE	07/25/06	SL	5.00		16	1,993.				1,993.	1,993.		0.	1,993.
20	CHAIR	08/04/06	SL	5.00		16	504.				504.	504.		0.	504.
21	FILE CABINET	08/04/06	SL	5.00		16	622.				622.	622.		0.	622.
22	AED	12/14/06	SL	5.00		16	1,595.				1,595.	1,595.		0.	1,595.
23	CONFERENCE ROOM TABLE, RUG	07/13/07	SL	7.00		16	12,312.				12,312.	12,312.		0.	12,312.
24	WINDOW TREATMENT DEPOSIT	07/13/07	SL	7.00		16	4,500.				4,500.	4,500.		0.	4,500.
25	CHAIR DEPOSIT	07/25/07	SL	7.00		16	3,100.				3,100.	3,100.		0.	3,100.
26	LAMP PURCHASE	08/08/07	SL	7.00		16	1,075.				1,075.	1,075.		0.	1,075.
27	RUG PURCHASE	08/08/07	SL	7.00		16	3,356.				3,356.	3,356.		0.	3,356.
28	RUG PURCHASE	08/31/07	SL	7.00		16	1,194.				1,194.	1,194.		0.	1,194.
29	WINDOW TREATMENTS	08/31/07	SL	7.00		16	7,927.				7,927.	7,927.		0.	7,927.
30	RUG PURCHASE	08/31/07	SL	7.00		16	985.				985.	985.		0.	985.
31	PRESIDENTS OFFICE, PROGRAM OFFICER OFFICE	07/19/07	SL	7.00		16	8,902.				8,902.	8,902.		0.	8,902.
32	TELEPHONE SYSTEM	09/05/07	SL	5.00		16	5,135.				5,135.	5,135.		0.	5,135.
33	OFFICE COPIER	09/14/07	SL	5.00		16	6,145.				6,145.	6,145.		0.	6,145.
34	RUGS, LAMPS	09/26/07	SL	5.00		16	6,863.				6,863.	6,863.		0.	6,863.
35	FILING CABINET	09/26/07	SL	5.00		16	1,558.				1,558.	1,558.		0.	1,558.
36	2 FILE CABINETS	09/30/07	SL	5.00		16	994.				994.	994.		0.	994.

828111 04-01-16

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2016 DEPRECIATION AND AMORTIZATION REPORT

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Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
37	RUGS	10/03/07	SL	5.00		16	1,734.				1,734.	1,734.		0.	1,734.
38	SECURITY CAMERA	10/31/07	SL	5.00		16	1,303.				1,303.	1,303.		0.	1,303.
39	BOOK CASE	11/02/07	SL	5.00		16	789.				789.	789.		0.	789.
40	LJB WINDOW TREATMENTS	11/16/07	SL	5.00		16	1,100.				1,100.	1,100.		0.	1,100.
41	SIGNAGE	11/08/07	SL	5.00		16	4,025.				4,025.	4,025.		0.	4,025.
42	ELAND GALLERY	12/10/07	SL	5.00		16	300.				300.	300.		0.	300.
43	PAINTING-DOWNSTAIRS BATHROOM	01/09/08	SL	5.00		16	1,088.				1,088.	1,088.		0.	1,088.
44	SHADE FOR PRES OFFICE	07/25/08	SL	5.00		16	1,298.				1,298.	1,298.		0.	1,298.
45	OFFICE COPIER 2ND FLOOR XPO	07/31/08	SL	5.00		16	1,525.				1,525.	1,525.		0.	1,525.
46	COMPUTER EQUIP	08/05/08	SL	5.00		16	1,343.				1,343.	1,343.		0.	1,343.
47	COMPUTER EQUIP	08/05/08	SL	5.00		16	3,426.				3,426.	3,426.		0.	3,426.
48	COMPUTER EQUIP	08/05/08	SL	5.00		16	1,791.				1,791.	1,791.		0.	1,791.
49	LATERAL FILES	01/11/10	SL	5.00		16	1,866.				1,866.	1,866.		0.	1,866.
50	LATERAL FILES	06/23/10	SL	5.00		16	1,749.				1,749.	1,749.		0.	1,749.
51	FLAG POLE	07/10/10	SL	5.00		16	1,355.				1,355.	1,355.		0.	1,355.
52	LED OUTDOOR PATHWAY LIGHTS	06/30/14	SL	5.00		16	6,050.				6,050.	6,050.		0.	6,050.
53	OVERHEAD PROJECTOR	07/07/10	SL	5.00		16	2,969.				2,969.	2,969.		0.	2,969.
54	DELL OFFICE COMPUTERS & INSTALLATION	08/06/12	SL	5.00		16	11,761.				11,761.	10,585.		1,176.	11,761.

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(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

2016 DEPRECIATION AND AMORTIZATION REPORT

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Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
55	LED PATH LIGHTS	02/07/13	SL	5.00		16	4,719.				4,719.	4,248.		471.	4,719.
56	RESEOURCE PARTNERS	10/23/13	SL	5.00		16	1,968.				1,968.	1,378.		394.	1,772.
57	RUG-CHES-MONT CARPET ONE	07/01/14	SL	5.00		16	2,296.				2,296.	1,148.		459.	1,607.
58	SHELVING FOR BASEMENT	06/30/13	SL	5.00		16	688.				688.	688.		0.	688.
69	SHUTTERS (CAROLS OFFICE	08/20/15	SL	5.00		16	3,010.				3,010.	502.		602.	1,104.
70	DELL COMPUTER (CAROL)	06/24/16	SL	5.00		16	863.				863.			173.	173.
71	HP PRINTER	06/23/16	SL	5.00		16	530.				530.			106.	106.
72	NEW ROOF-GSM ROOFING (FINAL)	09/14/15	SL	15.00		16	14,606.				14,606.	811.		974.	1,785.
73	HVAC SYSTEM	06/27/16	SL	39.00	MM16		7,325.				7,325.			188.	188.
	* TOTAL 990-PF PG 1 DEPR						954,776.				954,776.	289,726.		27,000.	316,736.

828111 04-01-18

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

MAJOR GRANTS CASH VERSION
July 1, 2016 - June 30, 2017

Grantee and/or Program		Grant Purpose	Amount of Grant(s) Paid
ACT - Association of the Colonial Theatre	227 Bridge Street Phoenixville, PA	4th of 5 payments toward renovation/construction	50,000
Adult Care of Chester County	201 Sharp Lane Exton, PA	Support for client subsidies and fund development capacity building	15,000
Alianzas de Phoenixville	148 Church Street Phoenixville, PA	General operating support	32,000
ALS Assoc. Greater Philadelphia Chapter	321 Norristown Rd. Suite 260 Ardmore, PA	Support for patient services in Phoenixville	5,000
Ann's Heart	502 S. Main St. Phoenixville, PA	General operating support and support for Code Blue Shelter initiative	15,000
Arc of Chester County	900 Lawrence Drive West Chester, PA	Support for education advocacy	15,000
Astral Artists	230 S. Broad Street Phila., PA	Support for Classroom and Community Classics programs in Phoenixville area	11,000
Baker Industries	184 Pennsylvania Ave. Malvern, PA	Workforce development program support	20,000
Bethany Christian Services of Greater Delaware Valley	7827 Old York Road Elkins Park, PA	Support for Safe Families program for at-risk children in Phoenixville area	45,000
Bethel Baptist Church	412 Fairview Street Phoenixville, PA	Support for installation of elevator	10,000
Bethel United Methodist Church	952 Bethel Church Road Spring City, PA	Support for installation of elevator	30,000
Borough of Phoenixville	351 Bridge St., 2nd Floor Phoenixville, PA	Support for installation of Borough Hall mural	5,000
Camphill Special School, Inc.	1784 Fairview Road Glenmoore, PA	Support for massage therapy program	5,000
Camphill Village Kimberton Hills	PO Box 1045 Kimberton, PA	Support for healthcare component of Aging in Community program	12,000
CareLink Community Support Services	1520 Chester Pike, Suite 600 Eddystone, PA	Support for mental health care, quality of life issues for the fragile and disabled	20,000
Chester County Community Foundation	28 West Market Street West Chester, PA	Support for the leadership programs	13,450
		Support for the Community Needs Assessment	35,400
Chester County Economic Development Council	737 Constitution Drive Exton, PA	Support for the GETT initiative	1,000
Chester County Health Department	601 Westtown Road West Chester, PA	Support for the Cribs for Kids program	2,000
Chester County Opportunities Industrialization Center	790 E. Market Street West Chester, PA	Support for the Phoenixville Youth Initiative	10,000
Chester County Public Safety Training Foundation	737 Constitution Drive Exton, PA	Capital grant - Public Safety Training Facility	60,000
Citizen Advocacy of Chester County	205 Church Street Phoenixville, PA	General operating support	6,000
Clinic, The	143 Church Street Phoenixville, PA	General operating support	180,000
Community Volunteers In Medicine	300B Lawrence Drive West Chester, PA	General operating support for Phoenixville area residents	15,000
Crime Victims Center of Chester County	PO Box 738 West Chester, PA	General operating support for Phoenixville work	30,000

MAJOR GRANTS CASH VERSION
July 1, 2016 - June 30, 2017

Grantee and/or Program		Grant Purpose	Amount of Grant(s) Paid
Daemion Counseling Center	PO Box 77 Berwyn, PA	Support for mental health care for Phoenixville area residents	4,000
Delaware County Community College	901 South Media Line Road Media, PA	Support for tuition assistance for Phoenixville Healthcare students	25,000
Diakon Adult Day Services at Manatawny	30 Old Schuylkill Road Pottstown, PA	Support for Phoenixville area client subsidies and capacity building	6,000
Domestic Violence Center of Chester County	PO Box 832 West Chester, PA	Support for Phoenixville area counselor advocate	10,000
		Phoenixville Incentive for Endowment grant	25,000
Exponent Philanthropy	Washington, DC	General operating support	250
Family Service of Chester County	310 North Matlack Street West Chester, PA	Matching grant in support of general operating expenses for Phoenixville work	5,000
Free Clinic Association of PA	980 E. Penn Drive West Chester, PA	Support for Performance Measures Phase II	5,000
Freedoms Foundation at Valley Forge	1601 Valley Forge Rd. Valley Forge, PA	Service learning and public policy program support - Phoenixville area students	8,000
Friends Association for the Care and Protection of Children	113 West Chestnut St. West Chester, PA	Support for outreach case management for homeless families in Phoenixville area	3,000
		Phoenixville Incentive for Endowment grant	25,000
Gateway Housing Group	704 Haywood Drive Exton, PA	General operating support for housing assistance for Phoenixville people in mental health recovery	20,000
Good Samaritan Shelter	PO Box 514 Phoenixville, PA	General operating support	15,000
		General operating support for Nourish Mobile Market	5,000
Good Works, Inc.	PO Box 1441 Coatesville, PA	Support for work in Phoenixville area	12,000
Grace Crossing Community Church	248 Church Street Phoenixville, PA	Support for food pantry	7,500
Grantmakers In Health	1100 Connecticut Ave. NW Washington, DC	Support as a funding partner	2,500
Health Care Access	PO Box 591 Phoenixville, PA	General operating support awarded 7/2016	450,000
		General operating support awarded 7/2015	50,000
Holcomb Behavioral Health Systems	224 Hall Street Phoenixville, PA	Support for Cornerstone Clubhouse Day Program	12,000
Hope Springs Equestrian Therapy	PO Box 156 Chester Springs, PA	General operating support	12,000
		Matching grant in support of scholarship assistance for Phoenixville disabled children	3,000
Housing Authority of Chester County	30 West Barnard Street West Chester, PA	Support for housing locator and case management programs	31,000
Limerick Cornerstone Outreach, Inc.	PO Box 935 Royersford, PA	Support for Cornerstone Picnic Park in Linfield for Give & Take Project	5,000
Meals On Wheels	510 East Barnard Street West Chester, PA	Support for meals for homebound Phoenixville, Spring City and East Pikeland residents	5,000

MAJOR GRANTS CASH VERSION
July 1, 2016 - June 30, 2017

Grantee and/or Program		Grant Purpose	Amount of Grant(s) Paid
Methacton Community Education Foundation	1001 Kriebble Mill Road Eagleville, PA	Support for Youth & Philanthropy program	6,500
Mission First Housing Group, Inc.	2042-48 Arch St., 2nd Floor Phila., PA	Support for capital and programs for Whitehall Veterans Housing Complex	25,000
Mom's House	152 Church Street Phoenixville, PA	Match grant in support of emergency needs fund	2,500
		General operating support	5,000
Open Hearth	101 North Main Street Spring City, PA	Support for development of The Help Book	78,700
		General operating support	10,000
Operation Warm	6 Dickerson Drive Chadds Ford, PA	Support for winter coats for Phoenixville area residents	4,000
Orion Communities, Inc.	247 Bridge Street Phoenixville, PA	General operating support	15,000
Owen J. Roberts Education Foundation	PO Box 127 St. Peters, PA	Support for Youth & Philanthropy program	8,000
People's Light and Theatre Company	39 Conestoga Road Malvern, PA	Program support for Community Matters and Community Conversation Projects	10,000
Petra Community Housing	201 S. Main Street Spring City, PA	Support for SteelTown affordable housing initiative	50,000
Philanthropy Network Greater Philadelphia	230 S. Broad Street , Suite 402 Phila., PA	Support as a funding partner	3,500
Phoenixville Area Children's Learning Center	310 Main Street Phoenixville, PA	Tuition subsidy support for low-income Phoenixville area families	35,000
Phoenixville Area Community Services	228 Church Street Phoenixville, PA	Match grant in support of emergency fund	7,803
		Phoenixville Incentive for Endowment grant - final installment	25,000
		General operating support	30,000
Phoenixville Area Positive Alternatives	400 Franklin Avenue Phoenixville, PA	Match grant in support of general operations	10,000
		General operating support and community mobilizer salary	15,000
Phoenixville Community Education Foundation	PO Box 348 Phoenixville, PA	Support for the mental health initiative for Phoenixville Area School District Youth and Philanthropy program and Phantom Food Packs	30,000
			26,000
Phoenixville Jaycees Foundation	PO Box 416 Phoenixville, PA	Support for Activate Phoenixville Area Community Wellness Program	38,000
Phoenixville Public Library	182 Second Avenue Phoenixville, PA	General operating support	9,000
Phoenixville Women's Outreach	313 Church Street Phoenixville, PA	General operating support for The House	25,000
Renaissance Academy	70 Renaissance Academy Phoenixville, PA	Support for Youth & Philanthropy program	8,000
Ronald McDonald House of Delaware	1901 Rockland Road Wilmington, PA	Support for Adopt A Room for Phoenixville area families	5,000
Royersford Outreach aka Open Door	350 Main Street Royersford, PA	General operating support	15,000
Schuylkill River Heritage Center at Phoenixville	2 North Main Street Phoenixville, PA	Operating support and program upgrades	8,000

MAJOR GRANTS CASH VERSION
July 1, 2016 - June 30, 2017

Grantee and/or Program		Grant Purpose	Amount of Grant(s) Paid
Schuylkill Township Police Department	111 Valley Park Road Phoenixville, PA	Support for automatic license plate reader	6,000
Senior Adult Activity Center	153 Church Street Phoenixville, PA	General operating support and fund development capacity building	60,000
Spring City Free Public Library	245 Broad Street Spring City, PA	Capital grant for new library building	25,000
Spring Ford Counseling Services, Inc.	210 North 4th Street Spring Ford, PA	General operating support	25,000
St. Peter's Episcopal Church	121 Church Street Phoenixville, PA	Support for hot lunch program	1,500
Stepping Stone Education Center	400 Franklin Avenue Phoenixville, PA	Scholarship support for low-income families	8,000
Support Center for Child Advocates	1900 Cherry Street Philadelphia, PA	Support for professional training services re: trauma/resiliencies	8,000
The Daniel Foundation	323 Drummers Lane Phoenixville, PA	Support for renovation of Center for Non-Profit Excellence	1,500
Transportation Management Association of Chester County	7 Great Valley Parkway Malvern, PA	Support for Ride for Health initiative	15,000
United Way of Chester County	2 West Market Street West Chester, PA	Support for Financial Stability Center	5,000
Variety - The Children's Charity	PO Box 609 Worcester, PA	Support for camp scholarships for Phoenixville area children with disabilities	5,000
Victims Service Center of Mont. Co.	325 Swede Street, 2nd Floor Norristown, PA	Phoenixville Incentive for Endowment grant	25,000
Volunteer English Program in Chester County	790 East Market Street West Chester, PA	General operating support for work in Phoenixville and fund development capacity building	45,000
Wings for Success	PO Box 1184 Frazer, PA	Support for work with Phoenixville women	3,000
Women's Resource Center	PO Box 596 Wayne, PA	Support for Single Mother Parenting program and Veterans' outreach in Phoenixville area	10,000
			2,137,103

Match Contributions
7/1/2016– 6/30/2017

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
12/15/2016	ACT / Assn. of Colonial Theater	Phoenixville	Kunsch	500
11/22/2016	ACT Colonial Theatre	Phoenixville	Beccaria	50
4/6/2017	ACT Colonial Theatre	Phoenixville	Reading	150
7/29/2016	ACT/Assn. of Colonial Theatre	Phoenixville	Benz	125
11/30/2016	ACT/Association for the Colonial Theatre	Phoenixville	McCracken	100
11/15/2016	ACT/Colonial Theatre	Phoenixville	Galbraith	35
8/3/2016	Aid for Friends	Philadelphia	Beccaria	50
11/8/2016	Aid for Friends	Philadelphia	Beccaria	50
8/17/2016	Alianzas de Phoenixville	Phoenixville	Beccaria	250
3/15/2017	American Cancer Society	Philadelphia	Kunsch	100
9/2/2016	Ann's Heart	Phoenixville	Gautreau	50
11/22/2016	Barnstone Art for Kids	Phoenixville	Beccaria	100
12/8/2016	Brandywine Health Fdn.	Coatesville	Poinier	100
12/20/2016	Bridge of Hope	Coatesville	Downs	1,000
5/22/2017	Camphill Special School	Glenmoore	Eustis	500
7/25/2016	ChesCo POPS	West Chester	Beccaria	50
11/22/2016	ChesCo Pops	West Chester	Beccaria	50
6/19/2017	ChesCo POPS	West Chester	Beccaria	50
6/19/2017	Chester County Christian Chorale	New Holland	Beccaria	50
10/6/2016	Chester County Community Fdn.	West Chester	Giardina	137.50
11/8/2016	Chester County Community Foundation	West Chester	Beccaria	100
12/30/2016	Chester County Hospital Foundation	West Chester	Poinier	100
1/5/2017	Citizen Advocacy	Phoenixville	Giardina	25
4/19/2017	Citizen Advocacy	Phoenixville	Kunsch	100
11/30/2016	Citizen Advocacy of Chester County	Phoenixville	McCracken	100
10/12/2016	Community Coalition	Phoenixville	Beccaria	50
6/19/2017	Community Coalition	Phoenixville	Beccaria	50
12/20/2016	Daniel Foundation	Phoenixville	Downs	500
11/8/2016	Domestic Violence Center of Chester Co.	West Chester	Beccaria	300
2/6/2017	Four Diamonds – Cancer support	Hershey	Gautreau	50
10/5/2016	Good Samaritan Shelter	Phoenixville	Eustis	250
11/2/2016	Good Samaritan Shelter	Phoenixville	Giardina	500
12/20/2016	Good Samaritan Shelter	Phoenixville	Eustis	300
6/12/2017	Good Samaritan Shelter, Inc.	Phoenixville	Giardina	167
12/19/2016	Green Valleys Association	Pottstown	Eustis	100
4/19/2017	Green Valleys Watershed Assoc.	Pottstown	Kunsch	100
7/11/2016	Health Care Access	Phoenixville	Kunsch	500
8/17/2016	Health Care Access	Phoenixville	Hartman	50
11/15/2016	Health Care Access	Phoenixville	Galbraith	71.20
11/15/2016	Health Care Access	Phoenixville	Galbraith	52.55
11/22/2016	Health Care Access	Phoenixville	Beccaria	100
11/30/2016	Health Care Access	Phoenixville	McCracken	100
12/15/2016	Health Care Access	Phoenixville	Frees	150
11/8/2016	Historical Society of Phoenixville	Phoenixville	Beccaria	50
2/25/2017	Historical Society of Phoenixville	Phoenixville	Hartman	50
12/15/2016	Historical Society of Phoenixville Ara	Phoenixville	Frees	1,000
11/10/2016	Historical Society of Phoenixville Area	Phoenixville	Kunsch	75
11/10/2016	Historical Society of Phoenixville Area	Phoenixville	McCracken	250
11/30/2016	Holiday Hope Chest	Collegeville	Polin	250

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
8/3/2016	Kelly Anne Dolan Memorial Fund	Ambler	Beccaria	100
8/17/2016	Kelly Anne Dolan Memorial Fund	Ambler	Beccaria	175
11/22/2016	Kelly Anne Dolan Memorial Fund	Ft. Washington	Beccaria	100
11/15/2016	Lower Providence Community Ctr. Ambulance	Eagleville	Galbraith	100
11/15/2016	Lower Providence Community Library	Eagleville	Galbraith	100
11/15/2016	Lower Providence Fire Department	Eagleville	Galbraith	50
12/20/2016	Main Line Animal Rescue	Chester Springs	Eustis	1,000
11/22/2016	Mom's House	Phoenixville	Beccaria	50
2/15/2017	Mom's House	Phoenixville	Giardina	50
9/28/2016	Montgomery County Foundation	Norristown	Giardina	162.50
11/30/2016	Open Hearth, Inc.	Spring City	McCracken	100
7/11/2016	Orion	Phoenixville	Beccaria	100
8/17/16	Orion Communities	Phoenixville	Kunsch	100
3/15/2017	Orion Communities, Inc.	Phoenixville	Kunsch	100
12/7/2016	PA Assistive Technology Fdn.	King of Prussia	Beccaria	50
11/15/2016	Perkiomen Watershed Conservancy	Schwenksville	Galbraith	100
11/15/2016	Perkiomen Watershed Conservancy	Schwenksville	Galbraith	100
9/2/2016	Phoenix Hose Hook & Ladder	Phoenixville	Gautreau	25
11/10/2016	Phoenixville Area Children's Learning Center	Phoenixville	McCracken	250
12/7/2016	Phoenixville Area Children's Learning Center	Phoenixville	McCracken	250
8/3/2016	Phoenixville Area Community Services	Phoenixville	Beccaria	50
10/5/2016	Phoenixville Area Community Services	Phoenixville	Colarusso	500
11/8/2016	Phoenixville Area Community Services	Phoenixville	Beccaria	50
11/30/2016	Phoenixville Area Community Services	Phoenixville	McCracken	100
12/15/2016	Phoenixville Area Community Services	Phoenixville	Kunsch	50
2/6/2017	Phoenixville Area Community Services	Phoenixville	Kunsch	100
11/2/2016	Phoenixville Area Police Athletic League	Phoenixville	Giardina	700
12/20/2016	Phoenixville Area Police Athletic League	Phoenixville	Beccaria	50
12/20/2016	Phoenixville Area Police Athletic League	Phoenixville	Downs	500
11/30/2016	Phoenixville Area Positive Alternatives	Phoenixville	Beccaria	50
8/3/2016	Phoenixville Area Senior Center	Phoenixville	Beccaria	50
11/30/2016	Phoenixville Area Senior Center	Phoenixville	McCracken	100
12/19/2016	Phoenixville Area Senior Center	Phoenixville	Frees	50
12/20/2016	Phoenixville Area Senior Center	Phoenixville	Beccaria	50
4/19/2017	Phoenixville Area Senior Center	Phoenixville	Kunsch	100
5/22/2017	Phoenixville Area Senior Center	Phoenixville	McCracken	195
4/12/2017	Phoenixville Ares Senior Center	Phoenixville	Beccaria	200
3/15/2017	Phoenixville Community Education Fdn	Phoenixville	Giardina	62.50
10/18/16	Phoenixville Fire Department	Phoenixville	Beccaria	100
11/30/2016	Phoenixville Fire Department	Phoenixville	McCracken	100
11/15/2016	Phoenixville Hospital - Nursing Ed Fund	Phoenixville	Galbraith	50
11/30/2016	Phoenixville Jaycees Foundation	Phoenixville	Giardina	65
12/30/2016	Phoenixville Jaycees Foundation	Phoenixville	Beccaria	100
4/12/2017	Phoenixville Jaycees Foundation	Phoenixville	Giardina	750
12/15/2016	Phoenixville Police Athletic League	Phoenixville	Kunsch	210
10/5/2016	Phoenixville Public Library	Phoenixville	Beccaria	100
10/18/2016	Phoenixville Public Library	Phoenixville	McCracken	250
4/6/2017	Phoenixville Public Library	Phoenixville	Reading	100
6/19/2017	Phoenixville Public Library	Phoenixville	Beccaria	50
1/5/2017	Phoenixville Regional Chamber of Commerce	Phoenixville	Polin	2,000
11/15/2016	Phoenixville Senior Center	Phoenixville	Galbraith	35
12/20/2016	Phoenixville Women's Outreach	Phoenixville	Downs	1,000

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
3/17/2017	Rotary Club	Phoenixville	Colarusso	150
6/19/2017	Rotary Club	Phoenixville	Benz	100
7/11/2016	Rotary Club of Phoenixville	Phoenixville	Kunsch	100
1/16/2017	Rotary Club of Phoenixville	Phoenixville	Polin	300
1/18/2017	Rotary Club of Phoenixville	Phoenixville	Beccaria	150
1/25/2017	Rotary Club of Phoenixville	Phoenixville	McCracken	300
1/25/2017	Rotary Club of Phoenixville	Phoenixville	Kunsch	150
1/30/2017	Rotary Club of Phoenixville	Phoenixville	Benz	50
2/10/2017	Rotary Club of Phoenixville	Phoenixville	McCracken	50
2/15/2017	Rotary Club of Phoenixville	Phoenixville	Giardina	75
10/6/2016	Salvation Army	Coatesville	Kunsch	100
11/30/2016	Schuylkill River Heritage Center	Phoenixville	McCracken	100
12/19/2016	Schuylkill River Heritage Center	Phoenixville	Eustis	150
2/15/2017	Schuylkill River Heritage Center	Phoenixville	Giardina	125
5/22/2017	Schuylkill River Heritage Center	Phoenixville	Eustis	250
10/5/2016	Soroptimist Intl. of Phoenixville	Phoenixville	Giardina	180
3/15/2017	Special Olympics PA	Norristown	Kunsch	100
6/26/2017	Sr. Adult Activity Center	Phoenixville	Hartman	50
3/15/2017	St. Jude Research Hospital	Memphis TN	Kunsch	100
8/3/2016	St. Mary's Franciscan Shelter	Phoenixville	Beccaria	50
11/30/2016	St. Mary's Franciscan Shelter	Phoenixville	Beccaria	50
11/14/2016	St. Peter's Episcopal Church	Phoenixville	Mathews	3000
7/11/2016	The Clinic	Phoenixville	Kunsch	100
12/8/2016	The Clinic	Phoenixville	McCracken	100
12/20/2016	The Clinic	Phoenixville	Eustis	250
1/18/2017	The Clinic	Phoenixville	Beccaria	100
2/6/2017	The Clinic	Phoenixville	Beccaria	50
2/6/2017	The Clinic	Phoenixville	Poinier	100
11/30/2016	United Way of Chester County	West Chester	McCracken	455
11/30/2016	University of Valley Forge	Phoenixville	McCracken	100
3/15/2017	USO	Philadelphia	Kunsch	100
4/19/2017	Valley Forge Fire Company	Valley Forge	Kunsch	100
				27,053.25

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
SCHOLARSHIP GRANT LIST
7/1/16 – 6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Battista, Alexandra	404 Picket Post Lane Phoenixville, PA 19460	Academic Scholarship to Temple University	None	7/29/16 #1030	1,000
Battista, Alexandra	404 Picket Post Lane Phoenixville, PA 19460	Academic Scholarship to Temple University	None	9/2/16 #1039	1,000
Battista, Alexandra	404 Picket Post Lane Phoenixville, PA 19460	Academic Scholarship to Temple University	None	1/5/17 #1052	1,000
Belmonte, Jessica	108 Pine Tree Road Paoli, PA 19301	Academic Scholarship to Aria Health School of Nursing	None	8/29/16 #1037	1,000
Belmonte, Jessica	108 Pine Tree Road Paoli, PA 19301	Academic Scholarship to Aria Health School of Nursing	None	12/19/16 #1047	1,000
Belmonte, Jessica	108 Pine Tree Road Paoli, PA 19301	Academic Scholarship to Aria Health School of Nursing	None	4/24/17 #1070	1,000
Byram, Katelyn	737 Gilbert Place Trappe, PA 19426	Academic Scholarship to Stevenson University	Non	7/6/16 #1024	1,000
Byram, Katelyn	737 Gilbert Place Trappe, PA 19426	Academic Scholarship to Stevenson University	None	1/5/17 #1057	1,000
Cohen, Karen	3 Stuart Drive Malvern, PA 19355	Academic Scholarship to University of Pittsburgh	None	7/29/16 #1031	1,000
Cohen, Karen	3 Stuart Drive Malvern, PA 19355	Academic Scholarship to University of Pittsburgh	None	1/5/17 #1050	1,000
Collins, Moira	80 Ferry Lane Phoenixville, PA 19460	Academic Scholarship to Franciscan University	None	2/24/17 #1068	1,000
Dinh, Amanda	108 Picket Post Lane Phoenixville, PA	Academic Scholarship to Temple University	None	2/24/17 #1067	1,000
Ferrizzi, Xavier	1349 Sheep Hill Road Pottstown, PA 19467	Academic Scholarship to Rider University	None	7/26/16 #1026	1,000
Flores, Veronica Perez	31 Bridge Street Phoenixville, PA 19460	Academic Scholarship to Alvernia University	None	12/7/16 #1046	1,000
Flores, Veronica Perez	31 Bridge Street Phoenixville, PA 19460	Academic Scholarship to Alvernia University	None	5/8/17 #1072	1,000
Gallina, Emily	1028 Balley Drive Phoenixville, PA 19460	Academic Scholarship to University of Minnesota	None	9/15/16 #1044	1,000
Gallina, Emily	1028 Balley Drive Phoenixville, PA 19460	Academic Scholarship to University of Minnesota	None	1/17/17 #1062	1,000
Gehret, Marlaina	01 Cheyenne Road Royersford, PA 19468	Academic Scholarship to Cornell University	None	7/26/16 #1028	1,000
Gehret, Marlaina	01 Cheyenne Road Royersford, PA 19468	Academic Scholarship to Cornell University	None	1/5/17 #1049	1,000
Halloran, Fiona	222 Main Street Phoenixville, PA 19460	Academic Scholarship to Salisbury University	None	7/26/16 #1027	1,000
Hoffman, Malcolm Connor	660 Doe Court Limerick, PA 19468	Academic Scholarship to University of Pittsburgh	None	8/12/16 #1034	1,000
Hoffman, Malcolm Connor	660 Doe Court Limerick, PA 19468	Academic Scholarship to University of Pittsburgh	None	1/5/17 #1048	1,000
Komar, Chad	219 First Avenue Phoenixville, PA 19460	Academic Scholarship to University of Pennsylvania	None	9/2/16 #1041	1,000
Komar, Chad	219 First Avenue Phoenixville, PA 19460	Academy Scholarship to University of Pennsylvania	None	1/25/17 #1064	1,000

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Little, Erin E.	1206 Chestershire Place Pottstown, PA 19465	Academic Scholarship to Widener University	None	9/15/16 #1045	1,000
Lowery, Andrew	1032 Blacksmith Lane Collegeville, PA 19426	Academic Scholarship to University of Pittsburgh	None	7/26/16 #1029	1,000
Lowery, Andrew	1032 Blacksmith Lane Collegeville, PA 19426	Academic Scholarship to University of Pittsburgh	None	1/5/17 #1056	1,000
McEvoy, Valerie	309 Gumbers Road Collegeville, PA 19462	Academic Scholarship to Penn State University	None	9/2/16 #1040	1,000
Patel, Assihilkumar	2821 Colony Drive Audubon, PA 19403	Academic Scholarship to Penn State University	None	8/17/16 #1035	1,000
Patel, Assihilkumar	2821 Colony Drive Audubon, PA 19403	Academic Scholarship to Penn State University	None	1/5/17 #1058	1,000
Pham, Ngan	626 New Street Spring City, PA 19475	Academic Scholarship to Immaculata University	None	8/29/16 #1038	1,000
Pham, Ngan	626 New Street Spring City, PA 19475	Academic Scholarship to Immaculata university	None	1/5/17 #1053	1,000
Pinelli, Michael Jack	228 Coldstream Road Phoenixville, PA 19360	Academic Scholarship to University of Pittsburgh	None	8/17/16 #1036	1,000
Pinelli, Michael Jack	228 Coldstream Road Phoenixville, PA 19360	Academic Scholarship to University of Pittsburgh	None	1/5/17 #1059	1,000
Pompizzi, Nicholas James	4 Fieldcrest Drive Collegeville, PA 19426	Academic Scholarship to Penn State University	None	9/15/16 #1043	1,000
Pompizzi, Nicholas James	4 Fieldcrest Drive Collegeville, PA 19426	Academic Scholarship to Penn State University	None	1/26/17 #1065	1,000
Roberts, Rosalyn	610 Valley Forge Road Phoenixville, PA 19460	Academic Scholarship to Temple University	None	9/2/16 #1042	1,000
Roberts, Rosalyn	610 Valley Forge Road Phoenixville, PA 19460	Academic Scholarship to Temple University	None	1/17/17 #1063	1,000
Romano, Nicole	105 Ashley Road Phoenixville, PA 19460	Academic Scholarship to Gwynedd Mercy University	None	8/3/16 #1032	1,000
Romano, Nicole	105 Ashley Road Phoenixville, PA 19460	Academic Scholarship to Gwynedd Mercy University	None	3/1/17 #1069	1,000
Sanchez, Mayra	214 Buchanan Street Phoenixville, PA 19460	Academic Scholarship to Widener University	None	2/23/17 #1066	1,000
Sellers, Jordan	1042 Kulp Road Pottstown, PA 19465	Academic Scholarship to Gettysburg College	None	8/12/16 #1033	2,000
Westerman, Ashley	418 South 2 nd Avenue Phoenixville, PA 19460	Academic Scholarship to University of Delaware	None	7/12/16 #1025	1,000
Westerman, Ashley	418 South 2 nd Avenue Phoenixville, PA 19460	Academic Scholarship to University of Delaware	None	1/5/17 #1055	1,000
Westlake, Jonathan George	2290 St. Peter's Road Pottstown, PA 19465	Academic Scholarship to Penn State University	None	1/5/17 #1051	1,000
Barber	c/o Technical College High School – Pickering 1580 Charlestown Road Phoenixville, PA 19460	Academic Scholarship to Delaware County Community College	None	5/10/17 #1073	1,000
Total Academic Scholarship Grants					47,000

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
HEALTH EDUCATION MINI-GRANT LIST
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Alianzas de Phoenixville	148 Church Street Phoenixville, PA 19460	Health education mini grant – support for Mindfulness Summer Camp	None	6/20/2017 #1196	500
Bon Homie Better Days Foundation	470 North Lewis Road Limerick, PA 19468	Health education mini-grant – in support of “The Shed” project	None	10/18/2016 #1100	500
Green Valleys Watershed Association	1368 Prizer Road Pottstown, PA 19465	Health education mini-grant – Little Sprouts Nature Classes at Phoenixville Library	None	12/7/2016 #1131	400
Kimberton Fire Company	PO Box 99 Kimberton, PA 19442	Health education mini-grant – fire education and prevention	None	7/26/16 #1028	500
Liberty Steam Fiore Engine Co. No. 1	20 South Main Street Spring City, PA 19475	Health education mini-grant – support for textbooks, lesson plans and reference materials for new teaching techniques or special one-time learning experience	None	10/26/2016 #1107	500
Methacton High School	1005 Kriebel Mill Road Eagleville, PA 19403	Health education mini grant – support for the Sharing Table initiative	None	3/10/2017 #1164	500
Owen J. Roberts High School	981 Ridge Road Pottstown, PA 19465	Health education mini-grant – support for hybrid PE fitness club	None	7/6/2016 #1019	500
Phoenixville Area Positive Alternatives / CTC	400 Franklin Avenue Suite 226 Phoenixville, PA 19460	Health education mini grant - support for ACES Creative Arts Festival in Reeves Park	None	5/8/2017 #1186	500
Phoenixville Area School District	386 City Line Avenue Phoenixville, PA 19460	Health education mini grant – TATU Safe Trick or Treat Night	None	10/14/2016 #12473	177.18
Phoenixville Ares School District	386 City Line Avenue Phoenixville, PA 19460	Health education mini grant – Paper Tigers for use in school and general community	None	3/15/2017 #13185	75
Ridge Fire Company	480 Ridge Road Spring City, PA 19475	Health education mini-grant - support for public education	None	7/11/2016 #1025	500
West Vincent Elementary School	2750 Conestoga Road Chester Springs, PA 19425	Health education mini-grant – support for social emotional learning	None	9/6/2016 #1037	500
					5152.18

Audit ... Grant list mini 2016 2017

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
CAPACITY BUILDING MINI-GRANT LIST
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Ann's Heart, Inc.	148 Church Street 2 nd Floor Phoenixville, PA 19460	Capacity building mini grant – strategic planning process	None	10/18/2016 #1091	500
Domestic Violence Center	PO Box 832 West Chester PA 19381	Capacity building mini grant – strategic planning process	None	10/3/2016 #1043	500
Family Service of Montgomery County	3125 Ridge Pike Norristown, PA 19403	Capacity building mini grant – Foundations Directory Online Professional version two-year contract	None	6/6/2017 #1193	1,000
Phoenixville Area Positive Alternatives	400 Franklin Avenue Suite 226 Phoenixville, PA 19460	Capacity building mini grant – strategic planning process	None	8/22/2016 #1035	1,000
					3,000

Audit ... Grant list capacity building mini 2016 2017

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MINI-GRANT LIST AED PURCHASE
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
East Coventry Township	855 Ellis Woods Road Pottstown, PA 19465	AED purchase	None	1/16/2017 #1153	1,500
Phoenixville Police Department	351 Bridge Street Phoenixville, PA 19460	AED purchase	None	4/24/2017 #1183	1,500
West Vincent Township Police Department	729 St. Matthews Road Chester Springs, PA 19425	AED purchase	None	9/13/2016 #1038	1,500
					4,500

Audit ... Grant list mini AED purchase 2016 2017

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
INTERNET TECHNOLOGY CAPACITY BUILDING GRANTS
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Triskeles	707 Eagleview Blvd. Suite 105 Exton, PA 19341	IT capacity building grant	None	11/30/2016 #1127	5,000
Volunteer English Program	790 East Market Street Suite 215 West Chester, PA 19382	IT capacity building grant	None	5/19/2017 #1189	5,000
					10,000

Audit ... Grant list Internet Technology Capacity Bldg. Grants 2016 2017

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
L. L. BEAN OUTDOOR EXPERIENCE MINI-GRANT LIST
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Green Valleys Watershed Association	1368 Prizer Road Pottstown, PA 19465	L.L. Bean Outdoor Experience – support for Explore Your Watershed Environmental Awareness Club activities	None	6/9/2017 #1195	500
Phoenixville Area Middle School	100 Purple Pride Parkway Phoenixville, PA 19460	L.L. Bean Outdoor Experience – support for Explore Your Watershed Environmental Awareness Club	None	11/30/2016 #1128	300
Ringing Rocks Elementary School	1401 Kauffman Road Pottstown, PA 19464	L.L. Bean Outdoor Experience – support for field trip to Althouse Arboretum	None	8/12/2016 #1033	300
					1,100

Audit ... Grant list L.L. Bean Outdoor Experience mini grant 2016 2017

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
CHAMPIONS OF THE COMMUNITY GRANT LIST
7/1/16-6/30/17**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Ann's Heart, Inc.	148 Church Street Phoenixville, PA 19460	At the request of Champion of the Community Marilyn Pennypacker	None	11/30/2016 #1120	2,000
ACT / Association for the Colonial Theatre	227 Bridge Street Phoenixville, PA 19460	At the request of Champion of the Community Jack Hall	None	11/30/2016 #1123	500
Citizen Advocacy	205 Church Street Phoenixville, PA 19460	At the request of Champion of the Community Jack Hall	None	11/30/2016 #1122	500
Good Works, Inc.	544 Lincoln Highway Coatesville, PA 19320	At the request of Champion of the Community Russ Herick	None	11/30/2016 #1119	2,000
Jennifer Lawrence Foundation	Community Foundation of Louisville 325 W. Main Street Suite 1110 Louisville, KY 40202	At the request of Champion of the Community Jack Hall	None	11/30/2016 #1124	500
Phoenixville Area Community Services	257 Church Street Phoenixville, PA 19460	At the request of Champion of the Community Jack Hall	None	11/30/2016 #1121	500
St. Mary's Shelter	209 Emmett Street Phoenixville, PA 19460	At the request of Mary Ann Bursich	None	11/30/2016 #1118	2,000
					8,000

Audit ... Grant List Champions 2016 2017