



Community Giving Foundation

# Dashboard

Enhancing the Quality of Life in the Central Susquehanna Valley—Achieving Donors' Intentions

DATA REPRESENTS JAN-FEB 2023 UNLESS NOTED

## Financials

Total Assets: \$66,326,077  
 Total Net Income: \$1,875,329  
 YTD Return on Investments: 3.50%  
 2022 Return on Investments: -16.78%

- Investment Management Fees: 0.39%
- Administration Fee for Endowed Funds: 1.5%
- 2023 Spending Policy: 4.5%
- Program Service Expenses: 83.37%

Asset Manager: Wilmington Trust

*We invest to protect your charitable giving. With an experienced investment team and asset manager and a wide variety of investment types, we operate on a 16-quarter rolling average to protect your giving in the good and bad times.*

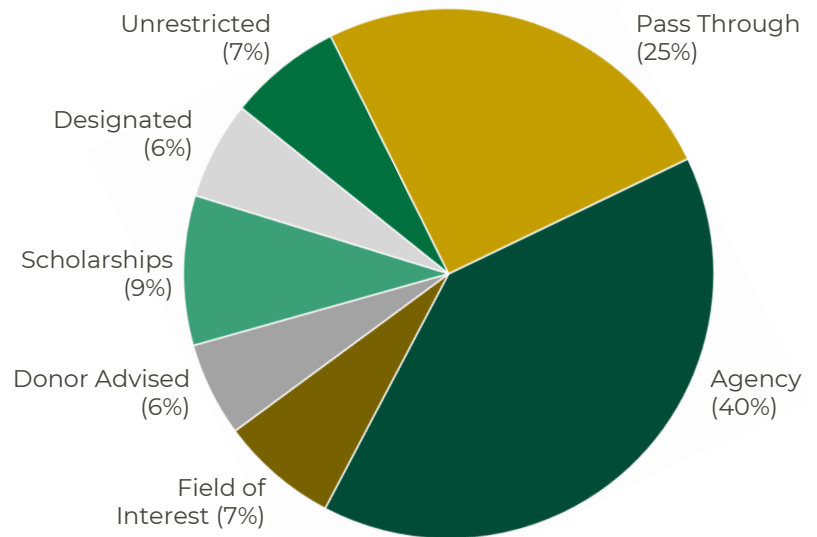
*The financial information on the dashboard may change if any revenue or expense activity is received after the date the information was prepared but is related to that specific reporting period. Learn more at [csgiving.org/dashboard](http://csgiving.org/dashboard).*

### Youth in Philanthropy:

In February, groups representing 13 school districts participated in regional meetings held in Berwick and Selinsgrove. Students designed their grant round processes including needs assessment, application, and review. They are accepting grant applications online through March 16th.



## Gifts by Fund Type



## Development

Total Gifts Received: 166 • Total Gifts: \$180,611  
 Total Funds: 342 • New Funds in 2023: 2

### New Funds Established in Jan/Feb:

- Bill and Ann Roll Charitable Fund (*designated*) (*Sunbury*)
- Dale Baker Endowment Fund (*designated*) (*Berwick*)

## Programs

Total Grants Awarded: 24  
 Total Grants: \$160,548

# Upcoming Events

**Youth in Philanthropy: Year-End Celebration**  
April 18th, 8:30am, Danville High School

**Selinsgrove: Annual Breakfast**  
April 19th, 8:30am, Susquehanna University

**Berwick: Annual Breakfast**  
May 31st, 8:30am, Rolling Pines

Visit [csgiving.org/events](https://csgiving.org/events) for more event details, updates, and online registration.



# 2023 Board

Dr. John Kurelja  
*board chair*

Mr. Harry Mathias  
*board vice-chair*

Mrs. Marissa Marshall Golla  
*board secretary*

Mr. John Thompson  
*board treasurer*

Dr. Robert Albertson

Hon. Richard Cashman

Rep. Lynda Schlegal Culver

Mrs. Julie Eriksson

Mr. Michael Goresh

Mr. John Grabusky

Mr. Jeff Hollenbach

Mr. Greg Martz

Mrs. Nancy Marr

Mr. Ryan McNally

Mrs. Angela Motto

Mrs. Wendy Tripoli

# Annual Report

Each of our staff, board members, fundholders, grant recipients, and community partners bring their own passions and motivations to the work that we do. When we come together, our loyalty to community and desire to help others connects us to create a philanthropic network of good. Read some of these stories and highlights in our new 2022 Annual Report at [csgiving.org/annualreport](https://csgiving.org/annualreport).



The Community Giving Foundation is a 501(c)(3) organization that develops, manages, and distributes funds for charitable purposes in communities across the Central Susquehanna region.

# Affiliates & Programs

- Community Giving Foundation: Berwick
- Community Giving Foundation: Bloomsburg
- Community Giving Foundation: Danville
- Community Giving Foundation: Selinsgrove
- Community Giving Foundation: Sunbury
- Nonprofit Leadership Series
- Women's Giving Circle
- Youth in Philanthropy



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