Community Giving Foundation Dashboard
Enhancing the Quality of Life in the Central Susquehanna Valley—Achieving Donors' Intentions

Data represents Jan-Jun 2023 unless noted

Financials

Total Assets: $69,476,067
Total Net Income: $5,024,964
YTD Return on Investments: 9.86%
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: 79.94%

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.

Gifts by Fund Type

Donor Advised (58%)
Designated (2%)
Field of Interest (2%)
Agency (12%)
Unrestricted (1%)
Scholarships (14%)
Pass Through (11%)

Programs

Total Grants Awarded: 296
Total Grants: $1,169,435

Completed Grantrounds:
Youth in Philanthropy, Selinsgrove, Berwick, Danville

New Funds Established in May/June:
- Ernest Harold Bogert Science Scholarship Fund (scholarship)
- Jeffrey Erdly Fund (donor advised)
- Mifflinburg Supporting All Students Fund (pass through)

Development

Total Gifts Received: 675 • Total Gifts: $1,021,733
Total Funds: 347 • New Funds in 2023: 7
Upcoming Events

**Bloomsburg: Annual Breakfast**
September 6th, 8:30am, The Links

**Women’s Giving Circle: Lucky Last One**
October 5th, 6:30pm, Pine Barn Inn

**Sunbury: Annual Breakfast**
October 18th, 8:30am, Susquehanna Valley Country Club

Visit csgiving.org/events for more event details, updates, and online registration.

Discover Your Story

Discover your giving story in partnership with the Foundation. Whether you are just learning about community foundations or are ready to take the next step in establishing a legacy through a name fund or planned gift, we can help!

Scan the QR code or visit csgiving.org for a digital version of our Giving Workbook. Contact our office for more information.

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

725 West Front Street • Berwick, PA 18603 • 570-752-3930 • csgiving.org