



**Community Giving**  
FOUNDATION™

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.*

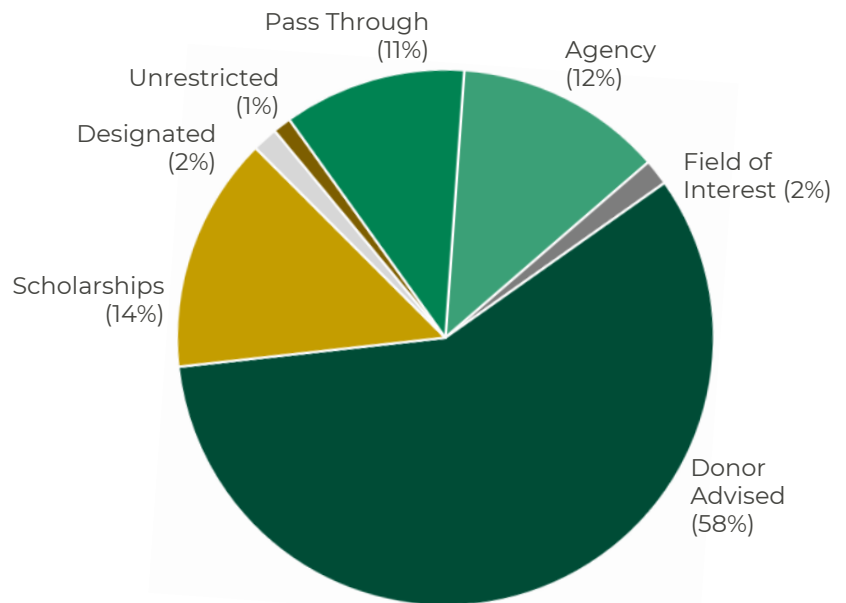
*The financial information on the dashboard may change if any revenue or expense activity is received after the date the information was prepared but is related to that specific reporting period. Learn more at [csgiving.org/dashboard](http://csgiving.org/dashboard).*

## Programs

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

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

## Gifts by Fund Type



## Development

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

### 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*)



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



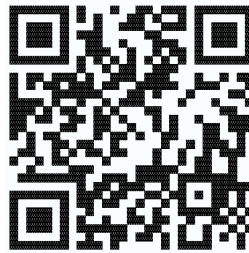
# 2023 Board

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  
Sen. Lynda Schlegal Culver  
Mrs. Julie Eriksson  
Mr. Michael Goresh  
Mr. John Grabusky  
Mr. Jeff Hollenbach  
Mrs. Nancy Marr  
Mr. Ryan McNally  
Mrs. Angela Motto  
Mrs. Wendy Tripoli

# 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](https://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](https://csgiving.org)