



**Community Giving**  
FOUNDATION™

# Community Giving Foundation

# Dashboard

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

DATA REPRESENTS JAN-OCT 2023 UNLESS NOTED

## Financials

Total Assets: \$66,285,682  
 Total Net Income: \$2,068,104  
 YTD Return on Investments: 3.96%  
 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.*

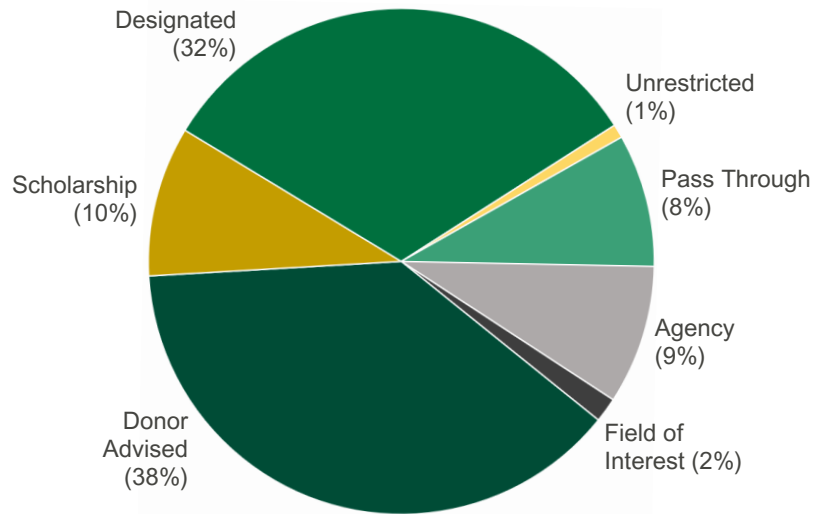
*The financial information on the dashboard may change if any revenue or expense activity is received after the date the information was prepared but is related to that specific reporting period. Learn more at [csgiving.org/dashboard](http://csgiving.org/dashboard).*

## Programs

Total Grants Awarded: 494  
 Total Grants: \$1,969,857  
 Total Scholarships Awarded: 316  
 Total Scholarships: \$449,478



## Gifts by Fund Type



## Development

Total Gifts Received: **1,200** • Total Gifts: **\$3,053,065**  
 Total Funds: **355** • New Funds in 2023: **15**

### New Funds Established in Sep/Oct:

- Bloomsburg Area School District Class of 1972 Fund ([Bloomsburg](#))
- Joanne McCall Spaid Simington and Paul F. Simington - Montour County Historical Society Fund ([Danville](#))
- Joanne McCall Spaid Simington and Paul F. Simington - Northumberland County Historical Society Fund ([Danville](#))
- Joanne McCall Spaid Simington and Paul F. Simington - Pennsylvania Forestry Association Fund ([Danville](#))
- Marlin K. Troutman Memorial Arts Award Fund
- Rudnitsky Susquehanna Valley Chorale Tenor 1 Fund ([Selingsgrove](#))

# Upcoming Events

## Foundation: Holiday Party

December 1st, 6pm, The Venue at Liberty Valley

## Save the Date!

## Foundation: 2024 Annual Meeting

March 6th, 8:30am, The Barn at Frosty Valley

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

Mr. Jeff Cerminaro

Rep. 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

# Local Stories ♥ Lasting Impact

Community Giving Foundation exists through the collective legacy of everyday people with a heart for the places they live, work, and play. Our work is only possible in a community where philanthropy is part of our culture. People like YOU continue to make the Foundation thrive across the region.

Watch your mail for our **2023 Storybook of Community Giving**, coming soon! The Storybook shares examples of people who have partnered with us, turning their passions into a lasting legacy of giving and impact.

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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