

Community Giving Foundation - Berwick

Q1

Our Community Foundation's MISSION STATEMENT:

Achieving donors' intentions to enhance the quality of life in the Central Susquehanna region.

Q2

Our community foundation works in these areas to GROW PHILANTHROPY:

| | |
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| Emerging Philanthropists: Youth Philanthropy (high school) | Yes. Have been for a while. We are experts. |
| Emerging Philanthropists: Young Adults (college) | No. Not at all. |
| Next Gen Philanthropists: Millennials (age @21-45) | No. Not at all. |
| Family & Individual Philanthropy | Yes. Have been for a while. Doing OK. |
| Women & Girls' Fund | Yes. Have been for a while. Doing OK. |
| Giving Circles | Yes. Recently initiated. |
| Due Diligence / Smart Grantmaking Training | Yes. Have been for a while. Doing OK. |

Q3

Our community foundation works in these SPECIALIZED areas to GROW PHILANTHROPY:

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|--|--|
| Giving Days / Extraordinary Give | No. Not at all. |
| Professional Advisor Outreach | Maybe. Considering. |
| Business & Corporate Charitable Funds | Yes. Have been for a while. Doing OK. |
| Private Foundation Services | No. Not at all. |
| PA EITC | Yes. Have been for a while. Doing OK. |
| Education / Focus On Our Future | Yes. Have been for a while. Doing OK. |
| Arts, Culture, Heritage / Culture Builds Community | Yes. Recently Initiated |
| Environment / Smart Growth / Sustainability | No. Not at all. |
| Community Economic Development | Yes. Recently Initiated |

Q4

Our community foundation works in these areas of NONPROFIT CAPACITY BUILDING:

| | |
|---|--|
| Grant funding for nonprofits to hire consultants | Yes. Recently initiated |
| Grant funding for nonprofits to partner, collaborate, reposition, merge | Yes. Recently initiated |
| Provide nonprofit management trainings, peer groups | Yes. Have been for a while. Doing OK. |
| Provide nonprofit board member training | Yes. Recently initiated |
| Help nonprofits + new potential board members connect | No. Not at all. |
| Train & support nonprofit planned giving | No. Not at all. |
| Train & support nonprofit endowment-building | No. Not at all. |

Q5

Our community foundation works in these areas of COMMUNITY LEADERSHIP:

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|---|--|
| Civic engagement | Yes. Have been for a while. Doing OK. |
| Democracy, voting rights, inclusion | No. Not at all. |
| Community needs assessments / Community report card | No. Not at all. |
| Community convening on specific pressing issues | No. Not at all. |
| Diversity, equity & inclusion initiatives | Yes. Recently initiated. |

Q6

Our Community Foundation #'s:

| | |
|------------------------------------|---------------|
| Year Founded | 1998 |
| # Staff FTE | 8 |
| # Board Members | 16 |
| # Volunteers (not including Board) | 0 |
| # Funds | 330 |
| Population # in Service Area | 270000 |

Q7

The DENSITY & CHARACTER of our geographic service area is approximately

| | |
|---------|-----------|
| % Rural | 48 |
| % Urban | 52 |

Q8

Our CF's AUM, Gifts in, Grants out, Operating \$, rounded to the nearest Millionth

| | |
|---|-------------------|
| \$MILLION Total Assets Under Management | 74,226,726 |
| \$MILLION Annual Donations/Gifts Received | 1,857,673 |
| \$MILLION Annual Grants & Scholarships/Paid Out | 4,003,606 |
| \$MILLION Annual Operating Budget | 1,028,180 |

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|--|--|------------------------------|-----------|
| Q9 | | % Donor Advised Funds | 11 |
| Our @proportion of entrusted FUNDS, by TYPE (product mix): | | % Nonprofit Designated Funds | 3 |
| | | % Discretionary Funds | 3 |
| | | % Other Funds | 83 |

| | | | |
|--|--|---|-----------|
| Q10 | | % Fully-endowed (invested to last for perpetuity) | 95 |
| The TIME HORIZON for our CF's entrusted funds is @ | | % Quasi-endowed (invested to spend down within several years) | 0 |
| | | % Provisional/Pass Through (100% granted out, at any time) | 5 |

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|--|--|---------------------------------|
| Q11 | | |
| We have experience with | | |
| Supporting Organizations | | Yes, a little. |
| Separately Managed Investment Accounts/Medallion Investment Partners | | None at all. |
| Socially Responsible Investment Offerings/Options (SRI, ESG) | | Maybe soon. Considering. |

| | | | |
|--------------------------------|--|----------------------------|-----------|
| Q12 | | % Fund Administration Fees | 97 |
| Our CF's OPERATING budget is @ | | % Other Revenue | 3 |

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| Q13 | | Council on Foundations - Community Fdtns Support Team |
| Our community foundation is a member of/participates in these PROFESSIONAL SERVICE ORGANIZATIONS: | | , |
| | | CF National Standards, |
| | | PA Community Foundation Association |

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| Q14 | |
| How our community foundation has fared during COVID: | |
| Partnerships with local government for disbursement of covid relief funding | |

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| Q15 | |
| What DISTINGUISHES our community foundation from others? | |
| 5 1/2 county service area, regional affiliate structure (5 affiliates) | |

Q16

Our PROUDEST initiatives, strategies, triumphs &/or learnings over the past few years:

Youth in Philanthropy, Women's Giving Circle, Stewardship of stakeholders, Foundant C-Suite transition, Communications for Rebranding

Q17

This is where our community foundation seeks HELP, learning from others' best practices in the field:

PACFA, Council on Foundations, Foundant, Attorneys

Q18

Contact info:

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|-----------|------------------------------------|
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