



A Year of Transition

2022 Annual Report



BERKS COUNTY
COMMUNITY
FOUNDATION



—
Al Weber,
Board Chair

Welcome!

Welcome to Berks County Community Foundation's Annual Report for 2022.

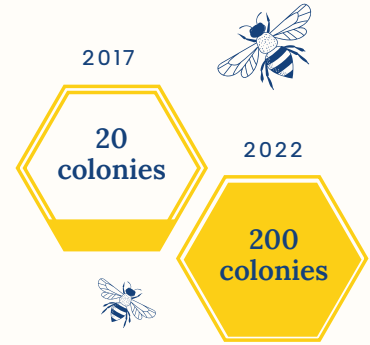
As Chair of the Board, I would like to thank the Community Foundation's staff and board members for their hard work, dedication, and long-range view of the foundation's mission to promote philanthropy and improve the quality of life in Berks County. Thanks to the support of our community, we've been able to take part in important local initiatives and distribute more than \$5.6 million in grants and scholarships for the benefit of local residents this year.

Sincerely,

Al Weber,
Board Chair

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200

organic honeybee colonies supported through a grant from the Jay and Elaine Rosenson Fund to Rodale Institute's Honeybee Conservancy, up from 20 colonies in 2017.



374

charitable funds managed



\$73,478,686

total grants and scholarships
awarded since 1994

At a Glance

\$781,984

in scholarships to 270 students

 **40** 

youth advisory board members in 2022 – local high school students who participate in community service projects to inform \$15,000 in annual grant distributions

Grants to 300 organizations totaling

\$4.8 million



—
Kevin K. Murphy,
President

Dear Friends,

Like the rest of the world, 2022 marked a year of transition for the Community Foundation. The first day of the fiscal year, July 1, 2021, was also the first day our staff returned to the office after working remotely for sixteen months. I had been proud of our team's ability to pivot to remote work. They'd excelled at the day-to-day functions of the foundation – accepting donations, creating new funds, and processing grants and scholarships – while gearing up to meet the unprecedented challenges our community faced in both the earliest days of the pandemic and its aftermath.

During that time, we discovered that much of our work is easily accomplished remotely, yet something was missing. As it turns out, the comradery of spontaneous conversations and brainstorming sessions is difficult to replicate in a virtual world.

So when the Commonwealth's work-from-home mandate expired, we knew it was time to get back to the office. To be honest, we were a bit awkward at first. The days felt long and in-person meetings required more energy than we remembered. But we soon fell into a new groove, combining the best of the technology we'd mastered remotely with the power of in-person convening. We were growing and changing, and we had work to do.

Over the course of the pandemic, Berks County Community Foundation's assets had grown substantially, from \$80 million to \$120 million, and we expect that growth to continue. While we've prided ourselves on maintaining a small, highly professional staff, we realized that to continue to have a significant impact in the community, we needed to rethink the way we were structured.

Fortunately, the seed for change had been planted a few years earlier, with the addition of Monica Reyes to our staff as our first specialized program officer. Monica joined us as the health and human services program officer in 2017, and proved through her excellent work that expanding our staff to include subject matter experts specific to our program areas would allow us to go

deeper to ensure the funds donors created for those areas would be put to the best use. Monica's role during the pandemic was exceptionally important: She represented us on the Berks County Covid-19 Task Force and in conversations about the need for a local public health department.

Last fall, we added two additional subject matter experts – an energy and the environment program officer and a lifelong learning program officer. Then, in January, we promoted long-time employee Heidi Williamson to chief strategy officer. In this newly created position, Heidi is building and overseeing the implementation of an external strategy that strengthens the Community Foundation's brand, attracts new assets, and elevates awareness of the foundation's community leadership activities.

The new positions represent the start of a staffing transition that will, over time, allow us to grow in lockstep with our endowment so we can expand the way we address the critical needs our community faces.

The remainder of the year was spent reconnecting – our board of directors began to meet in person again, business lunches popped up more often on the calendar, and nonprofit events once again began to run.

In June, we held our first scholarship luncheon in more than two years, and the excitement of the students, their parents, and the donors who made the scholarships possible was palpable.

We celebrated successes, too, including the announcement that an initiative led by Co-County Wellness - Berks Teens - had exceeded its goal of reducing teen pregnancy in Berks County by 40 percent by 2022. As you'll read on page 5, several of our funds contributed to that important initiative.

While 2022 marked a year of transition, it also marks the beginning of a new era for the Community Foundation. The growth of our endowment ensures that we'll be here for the long term, continuing to promote philanthropy and improve the quality of life for generations to come.

Thank you for being part of that growth.

Sincerely,



Kevin K. Murphy,
President



A BRIGHTER FUTURE For All

A decade ago, a local nonprofit called Co-County Wellness Services set out to reduce teen pregnancy in Berks County. It was no easy task, and the leaders of the organization knew they could not accomplish it alone.

They created a coalition of nonprofit, governmental, educational, and philanthropic organizations, including **Berks County Community Foundation**, to help.



Berks Teens shared medically sound information about avoiding unwanted pregnancies with teens and their parents at events throughout the year.

There is no more reliable indicator of poor educational and economic outcomes, and bad health, than teenage pregnancy,” said Monica Reyes, vice president for programs and initiatives at the Community Foundation. “Co-County Wellness Services approached this issue with methods that evidence shows are most effective. We knew that supporting this initiative would mean long-lasting, positive outcomes for our community.”

With the coalition at its side, Co-County Wellness Services launched the initiative Berks Teens Matter, now called “Berks Teens.” Their goal was to reduce teen pregnancy in Berks County by 40 percent by 2022. Berks Teens is an education and outreach campaign that engages young people to work with their peers. Armed with reliable, well-accepted information and data about the impact of teenage pregnancy and medically sound information about avoiding unwanted pregnancy, the campaign

fanned out across the county through social media, youth ambassadors, and outreach to parents.

“Sexuality is a fundamental aspect of being human, and sexual activity is a basic part of human development for young people in the United States,” said Carolyn Bazik, executive director at Co-County Wellness. “As they develop, adolescents and young adults need access to evidence-based, holistic, and non-stigmatizing information, education, and services that support their lifelong sexual and reproductive health and well-being.”

According to Co-County Wellness Services, recent data about teen pregnancy shows that:

- Three in ten American girls will get pregnant at least once before age 20. That’s nearly 750,000 teen pregnancies every year.
- Parenthood is the leading reason that teen girls drop out of school. More than half of teen mothers never graduate from high school.

Funds Making an Impact

Since 2014, the following funds at Berks County Community Foundation have provided more than \$420,000 to support Berks Teens’ effort to reduce teen pregnancy in Berks County.

- ▶ Community General Hospital Healthcare Fund
- ▶ Hawley and Myrtle Quier Fund
- ▶ Home Health Care Foundation Fund
- ▶ Kim and Kevin Murphy Fund
- ▶ Power of the Purse in Berks County Fund

- Less than two percent of teen moms earn a college degree by age thirty.
- About a quarter of teen moms have a second child within two years of their first baby.
- The United States has one of the highest teen pregnancy rates in the western industrialized world.
- A sexually active teen who doesn't use contraceptives has a 90 percent chance of becoming pregnant within a year.
- Almost 50 percent of teens have never considered how a pregnancy would affect their lives.

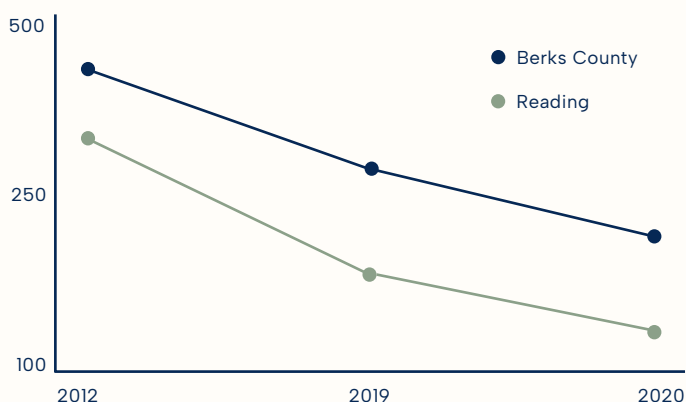
Working with dozens of local partners, Carolyn and her team developed and implemented a coordinated plan to sustain programs and practices to reduce teen pregnancy, leading to improved educational outcomes and long-term well-being.

In June 2022, Co-County Wellness Services announced that it exceeded its goal of reducing teen pregnancy, according to the latest report from the Pennsylvania Department of Health. The data in the report is from 2020, which means the goal was achieved two years early.

Births among teens ages 15 to 19 in Berks County decreased by 49.9 percent - from 455 to 228 births - between 2012 and 2020. Births among teens age 15 to 19 in Reading decreased by 44 percent - from 277 to 155 births - during the same period.

"As we celebrate the success of Berks Teens," Monica said, "it's important to remember that we can't afford to relax our combined efforts to ensure teens continue to receive the information they need to make healthy decisions."

Berks Teens is an education and outreach campaign that engages young people to work with their peers to share reliable, well-accepted information and data about the impact of teenage pregnancy.



Reduction in Number of Teen Births

Teen births decreased by **49.9%** in Berks County from 455 to 228 births.



Berks Community Health Center Celebrates Decade of Growth

In June 2022, Berks Community Health Center celebrated its tenth anniversary, marking a milestone not only for the center, but also for the many community members who volunteered thousands of hours of time to ensure there is a medical home for everyone who wants one in Berks County.

In 2004, the Community Foundation's Community General Hospital Healthcare Fund provided a grant to conduct the first ever community health needs assessment in Berks County. That assessment identified "access to healthcare" as a need, so the Community Foundation convened an advisory committee of local nonprofit and healthcare organizations to study the issue. The resulting research, conducted on behalf of the committee by the Drexel University School of Public Health, showed a difficult, yet achievable, path to creating Berks County's first federally qualified health center.

The advisory committee continued to work with Drexel to develop and submit a proposal to the federal government, which was ultimately approved and funded. Some members of the advisory committee stayed on to become members of the first board of directors for what would become Berks Community Health Center.

Opened in June 2012 on Penn Street, the center now has four locations in Reading and a "Wellness on Wheels" mobile unit. Each location provides health care services to community members regardless of their ability to pay. Over the past decade, Berks Community Health Center provided services to more than 65,000 patients who've completed 371,191 appointments, including well visits and treatments by specialists to whom they may not have had access before the center opened.



🌟 The Spark of Generosity

People create funds at the Community Foundation to make the world a better place.



—
Benches and wind chimes greet walkers in a special section of the museum grounds. Images taken by Susan L. Angstadt Photography.

A Walk in the Park

A man's love for his sister preserves a beautiful place for everyone at the Reading Public Museum

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The Trudy's Garden Fund is one of many charitable funds the Community Foundation manages to honor the memory of a local resident. Each year the fund provides a grant to the Foundation for the Reading Public Museum to maintain and preserve Trudy's Garden, a 25,000 square foot plot of land located on the museum grounds between Parkside Drive South and the Wyomissing Creek.

The fund was created in 2009 by the late Matthew Boland, whose sister Gertrude Anne "Trudy" Boland was the namesake of the peaceful green space on the museum grounds. Within the garden, walkers are often called to rest on benches that sit on a circular walkway, as finely tuned wind chimes create a melody in the trees above them.

Over the years, the annual grant has supported the general pruning and planting of the garden, and occasionally assisted with larger maintenance projects, including replacing worn benches and a bridge that had been damaged by storms.



Grants from the Fund for Ednannia support Ukrainian community foundations for programs like “Let’s Build Ukraine Together,” a youth movement that received a grant from the Community Foundation of Voznesensk to rebuild liberated villages and towns.



Help for Ukrainian Communities

A unique request leads to help for communities affected by war

In March 2022, the City University of New York Center on Philanthropy and Civil Society called Berks County Community Foundation with a request: Could a U.S. community foundation create a fund to support Ednannia, the Ukrainian network of community foundations?

Our answer, of course, was yes. Within twenty-four hours, we established the Fund for Ednannia and began accepting donations online.

Although Berks County Community Foundation is in southeastern Pennsylvania, we’ve had a long relationship with the community foundation movement in Eastern

Europe. More than twenty years ago, Kevin Murphy, the foundation’s president, was selected as a German Marshall Foundation Transcontinental Fellow. He traveled to Russia for the first time in 2001 to work with the Togliatti Community Foundation, unaware that he’d return again and again over the coming years. He soon met fellow community philanthropy leaders in Ukraine as well, and formed friendships in both countries. During a visit in 2019 to Kyiv, Kevin had a chance to meet with Ukrainian colleagues from Ednannia and the Ukrainian Philanthropists Forum. They spent a few hours together, which served as a master class in Ukrainian philanthropy.

When the crisis in Ukraine began, we gladly accepted the challenge of setting up a charitable fund to support Ednannia, with some encouragement and technical support from our friends at the Charles Stewart Mott Foundation in Flint, Michigan. To date,

nearly \$200,000 has been donated to the fund, much of it from other community foundations across the United States. Every dollar Ednannia receives from our fund is distributed directly to Ukrainian community foundations in towns and cities across their country to provide relief to Ukrainians affected by the war.

Our hearts are broken for our colleagues in Ukraine and in Russia. All across the world, those of us who are focused on community philanthropy work to improve the quality of life in the regions we serve – to strengthen schools, increase access to food and medicine, bring the arts to life, and more. That our colleagues are doing this work under crippling economic conditions, or worse, in a bomb shelter, is beyond our imaginations.

So we did what any community foundation would do: We stepped up to help.

Hop on the Bus

A pilot project gives local students access to public transit to get to summer programs, jobs, and wherever else they may need to go

In 2018, the Community Foundation released a report entitled *Afterschool and Summer Programs in Reading, Pennsylvania: A Supply and Demand Analysis*. It included several findings and recommendations, including the need to improve transportation options for families.

To address the issue, the Community Foundation reached out to representatives from the Berks Area Regional Transportation Authority (BARTA) and local government, who agreed to consider participating in a pilot project in summer 2019. With guidance from an out-of-school

time working group and the Reading School District, the Community Foundation developed a proposal for the pilot project, which was ultimately accepted by the Community Foundation, the school district, and BARTA.

The proposal allowed students in grades eight through eleven who had completed a bus ridership training program - and whose parents approved - to receive free bus passes for summer 2019. During the pilot, BARTA would track ridership and be reimbursed \$1 per ride by the Community Foundation's Hawley and Myrtle Quier Fund.

The purpose of the pilot project was to determine whether free access to public transportation would increase the number of students who rode buses on a regular basis. The hope was that more ridership would lead to greater participation in out-of-school-time activities and employment/ internship opportunities.

The pilot was initially scheduled to run once during summer 2019 for thirteen weeks. Based on the results from that first summer, the three partners agreed to run a second pilot during summer 2020. That second pilot happened during the height of the pandemic. Due to those unusual circumstances, the partners agreed to extend the pilot for one more summer in 2021.

Access to free public transportation proved to be an increasingly popular option for students based on ridership numbers.

Based on the outcome of the pilot project, in 2022 the school district and BARTA decided to continue to work together to fund free transportation for middle and high school students during the summer, helping to eliminate the transportation barrier to work and activities for students.

2019

2020

2021



130 students enrolled in the program, resulting in 1,879 trips taken

168 students enrolled in the program

391 students enrolled in the program, resulting in 4,305 trips taken



Welcome New Funds

Albert Boscov Memorial Scholarship Fund

Provides scholarships to Berks County high school seniors to study performing arts, entertainment, or sports management.

Bruce and Renee Dietrich Family Fund

Supports a variety of causes that are important to the Dietrich Family.

Clayton Schannauer Memorial Fund

Provides a scholarship to a graduating senior who played Wilson football and who possesses the qualities exemplified by Clayton Schannauer.

Forest Crigler, Jr. Memorial Fund in Support of Youth Swimming

Supports programs that develop, encourage and promote youth swimming in Berks County.

Friends of Berks County Emergency Response Team Fund

Supports the mission of the Berks County Emergency Response Team.

Friends of the West Reading Police Department and K9 Unit Fund

Promotes public engagement through community policing and supports innovative, emerging law enforcement needs and public safety gains.

Fund for Ednannia

Provides support for Ednannia, the Ukrainian network of community foundations, to provide emergency assistance in communities impacted by war.

Guenter Family Memorial Scholarship Fund

Provides scholarships to well-rounded graduating male and female athletes from Wilson School District who are dedicated to education and athletics.

Happy Birthday Reading Fund

Collects contributions to underwrite the cost of the City of Reading's 275th Anniversary celebration.

Jeffrey S. Waltman, Sr. Legacy Fund

Improves recreational spaces and supports recreational programs in the City of Reading.

John A. and Suzanne C. Funk Scholarship Fund

Provide scholarships to Reading High School seniors who were active members of the high school basketball team and who are pursuing post-secondary education.

Michael Constantine Film Education Fund

Supports ReadingFilmFEST to educate students and emerging filmmakers on how to develop and display their craft.

Reading Area Firefighters Museum Fund

Supports the Reading Area Firefighters Museum.

Reading Muhlenberg Career & Technology Center Education Fund

Supports student needs at Reading Muhlenberg Career & Technology Center.

Interested in
starting a fund?

We can help. To learn more about starting a charitable fund to support a cause you care about, call us at 610-685-2223 or email give@bccf.org.

Year in Review

Board

Officers*

Alfred J. Weber, Chair
President,
Tweed-Weber-Danks, Inc.

Kevin K. Murphy, President
Berks County Community Foundation

Frances A. Aitken, CPA, Treasurer**
Chief Operating Officer,
Berks County Community Foundation

Directors*

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Former Wealth Management Advisor,
Merrill Lynch

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Attorney, Georgeadis | Setley

Vicki O. Ebner, Esq.
Senior Counsel, East Penn
Manufacturing

Stephen M. Fritz
Former President, VF Outlet Inc.

Elaine McDevitt
Former CEO, The Rose Corporation

Michael L. Mixell, Esq.
Of Counsel, Barley Snyder

Kevin K. Murphy
President, Berks County Community
Foundation

Michael L. Mixell, Esq.,
Assistant Treasurer
Of Counsel, Barley Snyder

Jay R. Wagner, Esq., Secretary**
Shareholder, Stevens & Lee

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Senior Staff Engineering Lead,
WarnerMedia

Gabriela Raful, Esq.
Senior Partner,
Galfand Berger, LLP

Michael J. Rowley
Partner, Chairman of Board,
Herbein+Company, Inc.

Douglas F. Smith
Vice President/Commercial Loan
Officer, Mid Penn Bank

Ramona Turpin
Instructor, Literacy Council of
Reading-Berks Inc.

Alfred J. Weber
President,
Tweed-Weber-Danks Inc.

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Lyn Camella-Rich
Stephen M. Fritz
Kevin K. Murphy
Jay R. Wagner, Esq.

Governance Committee

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Julia H. Klein
Kevin K. Murphy
Ramona Turpin
Gabriela Raful, Esq.
Susan N. Denaro, Esq.

Audit Committee

Stephen M. Fritz, Chair
Alfred J. Weber
Charles E. Lumis
J. William Widing III, Esq.
Vicki O. Ebner, Esq.
Douglas F. Smith
Michael J. Rowley

Finance Committee

Stephen M. Fritz, Chair
Alfred J. Weber
Kevin K. Murphy
J. William Widing III, Esq.
Vicki O. Ebner, Esq.
Douglas F. Smith
Michael J. Rowley

Investment Committee

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Alfred J. Weber
Stephen M. Fritz
Charles E. Lumis
Kevin K. Murphy
P. Sue Perrotty
Douglas F. Smith
Michael L. Mixell, Esq.
J. William Widing III, Esq.

Staff

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Chief Operating Officer

Vivi Anthony
Executive Assistant

Erica M. Caceres
Communication Manager

Sally Cox
Finance and Operations
Administrator

Daniel Gombar
Grants Management
Administrator

Karen A. Miller
Senior Fellow

Kevin K. Murphy
President

Monica Reyes
Vice President for
Programs and Initiatives

Jeffrey Krick
Senior Accountant

William R. Sheeler
Senior Fellow

Kim Sheffer
Lifelong Learning
Program Officer

Heidi Williamson
Chief Strategy Officer

* Officers and Directors as of July 1, 2022.

** Serves as an officer, not a board member.
Staff as of December 5, 2022.

Financial Position

Berks County Community Foundation, Inc. and Supporting Organizations
Combined Statements of Activities 1 Years Ended June 30, 2022 and 2021

Investment Policy

The investment policy of Berks County Community Foundation is similar to that of most community foundations. The Foundation has a diversified and balanced portfolio. The objective of the investment policy is to provide a return that will preserve and grow the Community Foundation's assets, while providing a consistent stream of revenue to issue grants and scholarships. Annual distributions by the Community Foundation are generally calculated at 4.5 percent of the fair market value of each grant and scholarship fund. When annual earnings exceed a year's distribution from a fund, the excess is retained in endowment principal.

This strategy is intended to grow fund assets, thereby ensuring that the funds will fulfill their purpose in perpetuity.

For a copy of the Community Foundation's investment policy, audited financial statements, and our tax return, please visit www.bccf.org or call 610-685-2223.

Assets	2022	2021
Cash and cash equivalents	\$ 4,388,737	\$ 3,335,252
Accounts receivable	37,489	2,875
Contributions receivable, net	48,054	126,907
Beneficial interest in trusts	927,481	1,090,827
Property and equipment, net	47,623	43,090
Building, net	4,126,937	4,283,983
Land	243,754	243,754
Loans and interest receivable, net	315,067	416,314
Investments, at fair value	109,998,232	124,883,576
Total assets	<u>\$ 120,133,374</u>	<u>\$134,426,578</u>

Liabilities and Net Assets		
Accounts payable	\$ 78,194	\$ 51,052
Grants payable, net	1,696,056	2,029,141
Accrued expenses	189,402	110,910
Notes payable	1,707,386	1,772,845
Annuity payment liabilities	39,671	70,117
Funds held as agency endowments	3,144,088	514,763
Total liabilities	<u>6,854,797</u>	<u>4,548,828</u>
Net assets without donor restriction	112,351,096	128,786,923
Net assets with donor restriction	927,481	1,090,827
Total net assets	<u>113,278,577</u>	<u>129,877,750</u>
Total liabilities and net assets	<u>\$ 120,133,374</u>	<u>\$134,426,578</u>

Revenue and Other Support		
Contributions	\$ 5,249,395	\$ 29,933,092
Investment income	1,772,175	1,295,456
Net realized gains on investments	8,040,329	2,319,286
Net unrealized (loss)/gain on investments	(23,603,429)	20,036,593
Net unrealized (loss)/gain from beneficial interest in trusts	(163,346)	207,526
Other income	77,574	96,660
Total revenue and other support	<u>(8,627,302)</u>	<u>53,888,613</u>

Expenses		
Program services	6,907,705	4,213,474
General and administrative	649,646	590,355
Fundraising	414,520	310,391
Total expenses	<u>7,971,871</u>	<u>5,114,220</u>
Change in net assets before forgiveness of indebtedness	(16,599,173)	48,774,393
Forgiveness of indebtedness	-	154,670
Change in net assets	(16,599,173)	48,929,063
Net assets at beginning of year	<u>129,877,750</u>	<u>80,948,687</u>
Net assets at end of year	<u>\$ 113,278,577</u>	<u>\$ 129,877,750</u>

About Berks County Community Foundation

Berks County Community Foundation is a nonprofit corporation that serves as a civic leader for our region by developing, managing, and distributing charitable funds aimed at improving the quality of life in Berks County, Pennsylvania.



BERKS COUNTY
COMMUNITY
FOUNDATION

The official registration and financial information of Berks County Community Foundation may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1.800.732.0999. Registration does not imply endorsement.

Contact Us Or Visit Us Online

237 Court Street
Reading, PA 19601

610-685-2223
www.bccf.org

