



Susan Denaro, **Board Chair** 

#### Welcome!

Welcome to Berks County Community Foundation's Annual Report for 2023.

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 the community, we've been able to take part in important local initiatives and distribute more than 6.2 million in grants and scholarships for the benefit of residents this year.

Sincerely,



Susan N. Denaro, **Board Chair** 

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mini-grants to **Berks County Schools** 



2,702

donations in 2023



charitable funds managed

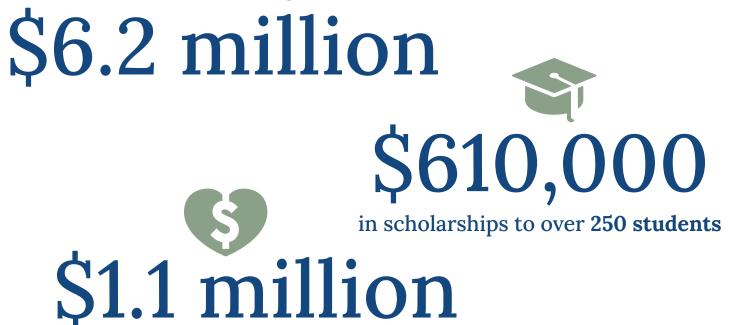


new funds created



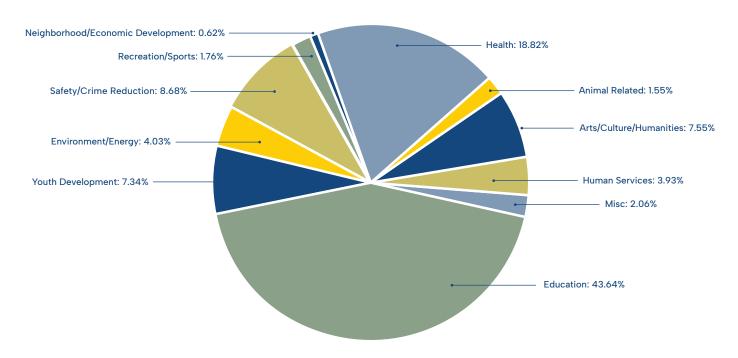


**635 Grants** totaling over



total amount of donations for the West Reading Disaster Recovery Fund

### 2023 Grantmaking Program Areas





Kevin K. Murphy,
President

## Dear Friends,

2023 was a year of growth at Berks County Community Foundation. We expanded our team in a variety of ways, specifically with the addition of expert program officers in each of our community initiatives.

This strategic move is not only about growing our organization, but also about enhancing our ability to make a lasting difference in our community. Having dedicated program officers enables us to implement our mission with precision, create a more profound and positive impact, and promote philanthropy as a spark for change.

At the Community Foundation, we do three things: help people create charitable funds, manage those charitable dollars, and distribute grants and scholarships. To do this, we've added experts to our team in the following community initiative areas:

- Environment and Energy
- Health and Human Services
- Lifelong Learning

In January, we welcomed Cindy Milian as the health and human services program officer and Emily Smedley as the environment and energy program officer. These program officers will help to ensure charitable dollars are put to the best use for the community. They join Kim Sheffer, our lifelong learning program officer, and Monica Reyes, our vice president for programs and initiatives, who leads the team.

In addition to our new program officers, last fall, we welcomed Erica Caceres, our communication manager, in anticipation of the launch of our new website. Designed with the user in mind, the new site offers a fund directory, bigger and bolder images, and an easy-to-navigate homepage. The new site is located at the same address, bccf.org.

We believe this expansion is a significant step forward in our journey to kindle the flame of change and growth. As we continue to evolve and adapt to the challenges and opportunities in our community, our commitment to making Berks County a better place for all residents remains unwavering.

This year, through the generosity of the community, 11 new funds were created at

the foundation including the West Reading Disaster Recovery Fund, which raised more than one million dollars in donations over a three-month period. That brings the total number of funds we now manage to 346. We distributed 635 grants to individuals and organizations from those funds this year.

We remain excited about the possibilities and look forward to working together to address the needs of our community in the coming year. We hope you enjoy reading this report, which highlights just a few of the many stories made possible by the charitable funds we manage.

Finally, we are grateful for the 2,702 donations we received this year. We are honored by your support and belief in our mission. Together, we are creating a brighter future for Berks County.

Sincerely,

Kevin K. Murphy,

President

#### Meet Our Program Officers



Cindy Milian: Cindy oversees grants for individuals, public health initiatives, and human services initiatives. Cindy has a Bachelor of Arts Degree in psychology and over 25 years of experience in various roles related to family support and intervention. For the past two decades, she worked at Berks County Children

and Youth Services, where she served as an Intake/Screening Caseworker, Quality Assurance Specialist, and Intake/Screening Casework Supervisor, also providing training for community agencies in Berks County. She has a strong background in diversity and community involvement, and as a first-generation American-born Latina with a diverse life experience, she is well-equipped for her work in health and human services.



Emily Smedley: Emily manages programs and grants related to the environment, sustainable energy, land use, and neighborhood vitality. She manages the Metropolitan Edison Company Sustainable Energy Fund and advocates for energy efficiency and renewable energy projects in the community. Emily has a background

in environmental and social advocacy, including work with Lancaster Clean Water Partners and a Baltimore-based communications firm focused on social change. She holds a bachelor's degree in communication and Digital Media Studies and enjoys exploring craft breweries, hiking, reading, and spending time with her dogs in her free time.



Kim Sheffer: Kim, a Berks County native, manages the Community Foundation's scholarship and education grant funds. She graduated from Exeter Township Senior High and Alvernia University with a Bachelor of Arts in early childhood and elementary education. Kim initially worked as a teacher for five years before

spending a decade at the Reading Public Library, starting as a Children's Library Assistant, and eventually becoming the Senior Outreach Coordinator. During her time there, she was involved in various library committees and programs, including organizing senior programs at Berks Encore, and winning multiple bake-off competitions among library staff.



#### **FOCUS AREAS**

Our mission is to promote philanthropy and improve the quality of life for the residents of Berks County. We do this by helping people create charitable funds, managing the money in those funds, and distributing grants and scholarships to benefit the community.

Much of our grantmaking falls within the following focus areas:

#### Arts, Culture, and Humanities

Our funds and programs celebrate the humanities and connect local residents to the many artistic and cultural activities that take place in our community.

#### **Environment and Energy**

Our funds support projects and programs that recognize the value of our farmland and open space, promote energy efficiency, and reduce our impact on the planet.

#### Health and Human Services

We work to ensure our community members have access to the health information and quality of life services they need to function at their best.

#### Lifelong Learning

We're here to help build a community of life-long learners through a variety of professional development programs and scholarships.

#### Neighborhoods and Economic Development

We manage funds to enhance the places people care about in Berks County.

# A Community Conversation on the Future of Wellness

A New Study Unveils Key Recommendations for Improving Public Health

In March 2023, the Berks County
Commissioners released a study
about public health in our community.
The study was conducted by Health
Management Associates and listed four
recommendations:

- Create a Berks County Health
   Director position to lead public health collective action and coordination and serve as a trusted communicator about public health information.
- Establish a Public Health Advisory
   Panel and appoint members who can
   advise on public health assessment,
   assurance, and policy activities.
- Support the establishment of a
   "Healthy Berks" Coalition to serve as
   a coordinating body for public health
   efforts in the county.
- 4. Create a Berks County Health Data Analyst position to improve Berks County-specific public health data completeness and accuracy.

The county-level health data in the report highlights significant areas of concern within Berks County.

Throughout the report, a consistent trend indicates that Berks County residents tend to exhibit poorer health behaviors and outcomes across most indicators when adjusting for population differences.

After reviewing the results of the study, the Berks County Medical Society hosted a community conversation to give residents a chance to ask questions about the health study. The Community Conversation was funded by the Community General Hospital Healthcare Fund of Berks County Community Foundation.

The goal of the Community

Conversation was to review the
report and have an open discussion

on the future of public health in our community.

"A community that is focused on public health strives to guarantee that every resident has equal access to the resources needed to lead healthy and productive lives," said Jeanne E. Franklin, MPH, PMP, Public Health Director in Chester County.

The Community General Hospital Healthcare Fund was established in 2004 to support health-related initiatives in Berks County. The fund honors the legacy of the former Community General Hospital, which was based in Reading.

#### Quality of Life Ranking, 2020

INDICATOR	BERKS COUNTY	PENNSYLVANIA	UNITED STATES
Poor or Fair Health	20%	18%	17%
Poor Physical Health Days	4.2	3.9	3.9
Poor Mental Health Days	4.6	4.6	4.5

 $County\ Health\ Rankings\ and\ Roadmap,\ Berks\ County,\ 2022,\ https://www.countyhealthrankings.org/explore-health-rankings/pennsylvania/berks?year=2022$ 



# We Nurturing Education Through a Gardening Grant

aking care of the earth's soil to grow vegetables, plants, and flowers is a beneficial and enjoyable activity that teaches a variety of life skills. Many schools use gardening to educate students about the environment, plant biology, agriculture, and more. Students from the Tulpehocken Area School District recently dug up an educational garden of their own with the help of a \$500 Teacher Mini-Grant from Berks County Community Foundation.

Teacher Mini-Grants are available for schoolteachers who think outside of the box, or in this case, the garden.

The mini-grant program is supported by the Berks County Association of School Retirees Scholarship and Grant Fund, the Public Education Foundation Fund for Instructional Innovation, the Ben Franklin Trust Fund, and one of the Community Foundation's donoradvised funds. The program supports classroom educators in public schools throughout Berks County, enabling

them to acquire specialized materials, engage in enriching activities, execute innovative projects, and implement valuable programs.

Life Skills teachers at Tulpehocken
Area High School recognized the
potential benefit of creating an
educational garden for their students.
The garden, called Harvesting Hope,
was planted to teach students about
healthy living through gardening while
cultivating other important lessons
throughout the process.

Harvesting Hope provided six months' worth of lessons in subjects that included:

- · Research and purchasing products
- · Building planters
- · Planting seeds
- · Transferring seedlings
- Harvesting vegetables and flowers
- Cooking vegetables
- Selling extra produce to staff
- Composting

The school purchased gardening sets, a garden planter, a wooden raised bed, seeds, potting soil, a compost bin and starter kit, and a gardening tool organizer.

"If fifty percent of the plants can be harvested, we will consider ourselves successful growers," said Kristen Parsons, Life Skills teacher.

With the program sprouting in January, it followed the Whole Kids Foundation School Gardening Lesson Plan provided



by the American Heart Association. The plan consists of 35 cross-curricular lessons that help students learn the importance of healthy eating. Throughout the process, students

documented the journey of the garden through journals.

This program is expected to repeat the harvest each year.

#### Welcome New Funds 🦇



Bill Woolworth Memorial **Fund for Berks Teens** 

This fund support's Co-County Wellness Service's Berks Teens Program.

Reading Pride Celebration Gives Back Fund

This fund supports projects and programs that affirm and enhance the lives of LGBTQ youth in Berks County.

America 250 PA Berks County Fund

Distributions from the fund will underwrite the cost of the America 250 PA Berks County celebration.

Michael Kostzewa Study Abroad Scholarship Fund

The purpose of this fund is to award study abroad scholarships for graduating seniors from the Governor Mifflin School District who excelled in social studies in high school.

Woman's Exchange of Reading Fund

This fund assists local artisans in the pursuit of perfecting their art, trade or craft.

Mr. and Mrs. George R. Weidner Scholarship Fund

This fund provides an annual scholarship to the best all-around and best liked male and female graduating senior from Oley Valley High School as selected by the Senior Class.

Olivia L. Barres Memorial Scholarship Fund

This fund provides an annual scholarship to a graduating senior from Oley Valley High School who is entering the medical profession.

West Reading Disaster Recovery Fund

This fund provides aid to members of the community who were affected by the March 24, 2023 explosion in West Reading.

#### 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.

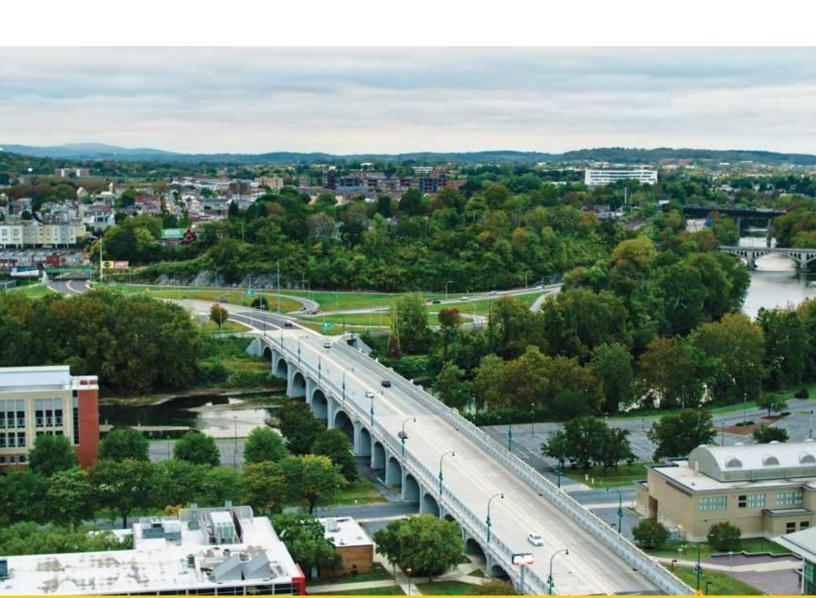


# West Reading Disaster Recovery Fund Helps Community Cope with Loss

At the Community Foundation, we help people who want to do something charitable in the community. That often means working with them after a significant life change – like the loss of a loved one – or when they're considering how to structure their will.

We help them determine the best way to have their money make a difference in the community and support the causes or organizations they care about.

Most often, we're working with private individuals or couples, but we also help businesses structure their community giving, and are here to help when the community as a whole needs us.



We had the honor of serving that role in March 2023 when a tragedy at a chocolate factory in West Reading occurred. While the circumstances were somewhat more intense than they tend to be when we're helping someone add a charitable bequest to a will, the process we followed was the same.

In this case, the people who wanted to do something charitable were the Borough Council members in West Reading, who were fielding calls almost immediately from those who wanted to give money to support the victims of the tragedy. The Borough Council reached out to the Community Foundation and we worked with them – and in collaboration with the United Way of Berks County – to quickly establish the West Reading Disaster Recovery Fund, which we had online less than twenty-four hours after the explosion.

First, we helped the Borough Council members determine the guidelines for how any donations would be spent to help those in need.

Next, we collected the donations – more than \$1 million total – and sent acknowledgements to everyone who gave.

Then, we distributed the grants according to those guidelines, putting nearly a quarter-of-a-million dollars in the hands of those most affected by the tragedy less than a week later, ensuring they had cash on hand for funeral expenses and to take the first steps to rebuild their lives. We made additional distributions as more donations came in, all with the goal of helping families cope with their loss.



Finally, we've been accountable to the people who gave and to West Reading Borough Council who started the fund, reporting back to them about how the grants were distributed.

We were honored to help steward the community's philanthropy during this

tragic event. In addition to donations from hundreds of local families, businesses, and individuals, we received donations from people in every state and from nations around the world. The outpouring of support for our community was truly incredible.

#### Grant Priorities for West Reading

Based on the level of donations received, the West Reading Disaster Recovery Fund provided grants in the following order of priority:

- 1. Grants to organizations providing support to the families of individuals killed in the explosion for immediate financial losses.
- 2. Grants to organizations providing support to individuals displaced from their homes as a result of the explosion.
- 3. Grants to organizations providing support to individuals displaced from employment as a result of the explosion.
- 4. Support to the Borough of West Reading for planning and/or implementation of historical commemoration of the explosion (including but not limited to the creation of a memorial to those lost).



Kim Sheffer, Lifelong Learning Program Officer, sits with students to learn about the books they are reading through the trading cards program.

# Sparking Excitement for Reading Through Trading Cards

I nnovative classroom projects can serve as a catalyst for strong academic performance. Librarians at Brecknock Elementary School wanted to enhance the conventional reading curriculum by introducing a project that would excite children about reading and promote collaboration and creative thinking.

To ensure students would enjoy the project and meet their required goals,

the library staff tapped into a preexisting student interest in trading cards. The project allowed students to learn about different book genres while collecting unique trading cards they helped to design.

The students worked with the library staff to brainstorm book categories and genres. These categories later corresponded to characters on the trading cards. Within each category, graphic design students at Governor Mifflin Senior High School designed fantasy characters that were then printed on the cards. Students could collect different sets of character cards by reading books in a variety of genres.

Both the elementary students and high school students imagined the specific details of the land the characters lived in, making for a much more collaborative and personalized project. They printed the cards in-house at the Governor Mifflin Print Shop.

"The cards motivated third and fourth grade library users to thoughtfully explore new books that represent diverse characters, topics, and genres, and promote a sense of belonging and connection," said Rachel Sebastian, Learner-Centered K-4 Teacher Librarian.

The cards often encouraged children to pick books outside of their comfort zones. Teachers sometimes find it challenging to get children to develop an interest in nonfiction work, specifically nonfiction that is not about animals. This trading card project tackled this challenge by rewarding students for reading books outside of their comfort zone, as children collected different cards by checking out books of various genres from the library.

In May, the library held a trading card convention, where students set up booths to share their favorite cards.

The Literacy Trading Card program at Brecknock Elementary School breathed new life into the world of reading. By mixing the joys of reading and collecting, the initiative has succeeded in creating excited readers who view books as more than just words on paper. This innovative project shows students the magic that lies within every page and the endless possibilities that words can unlock.

Funding for this project came from the Teacher Mini-Grants program of Berks County Community Foundation.





A Teacher Mini-Grant Program allowed library staff to tap into student's pre-existing interest in trading cards to encourage students to pick books outside of their comfort zone.



# Addressing the Pressing Mental Health Needs of Youth with VOiCEup Berks

OicEup Berks has developed the Youth Mental Health Education Initiative, which addresses the need for accessible mental health resources for local youth while recognizing that young people have an easier time communicating with others their own age. VOicEup educates youth about mental health issues and the support systems available to them.

As part of the initiative, fifteen student participants, also known as Youth Mental Health Ambassadors (YMHA), work directly with the National Alliance on Mental Illness (NAMI), which teaches them about mental health topics, resources for support, and suicide prevention efforts. Once the YMHAs complete these learning requirements, they assist VOiCEup Berks staff. This project was funded by the Home Healthcare Foundation Fund.

VOiCEup Berks promotes individual and community growth by connecting different sectors of Berks County through volunteer opportunities. The organization hopes to reach thousands of youths and adults in our community with this initiative.

For example, to address the need for youth education on suicide prevention, VOiCEup Berks will educate local youth through "Question, Persuade, Refer" (QPR) training, a professional form of suicide prevention training. Certified VOiCEup Berks staff will train students on properly identifying and addressing a suicide crisis. Upon completion of the training, students should be able to persuade and refer someone to get help effectively. Young Mental Health Ambassadors, students at Yocum Institute, students from the VOiCEup Berks advisory board, and students from

local high schools will receive training from the staff of VOiCEup Berks.

In addition, the Yocum Institute will partner with VOiCEup to complete the "Suicide Prevention Through Art Collaboration" project. Yocum performers will bring a suicide awareness play called "Between Apt. 2B and the End Zone" to different high schools in Berks County. The primary goal of the play is to spark hope in the students watching while simultaneously reducing the stigma behind suicide.

To reach as many Berks County residents as possible, Youth Mental Health Ambassadors will work alongside the Muhlenberg Aevidum Club and a marketing professional to create a suicide prevention marketing campaign. This campaign will be youth-driven and focused on normalizing discussions and treatment related to mental health. Promotions will include social media campaigns, printed content, an awareness video, t-shirts, and billboard advertising.

Finally, to help parents handle mental health crises, there will be a workshop for parents to learn about the mental health needs of youth.

More information about the program can be found on the VOiCEup Berks website at www.voiceupberks.org.

#### The Home Healthcare Foundation Fund

**(** 

The Home Healthcare Foundation Fund supports:

- ▶ Programs and educational activities that promote the general health and wellness of Berks County residents or its contiguous counties;
- ▶ Organizations and programs that help the residents of Berks County or its contiguous counties recover from illness or disability at home;
- ▶ Organizations that provide health-related charity care for the residents of Berks County or its contiguous counties;
- ▶ Programs and activities that support preventative healthcare and community health.



#### Counting Raptors: How a Hawk's-Eye View Benefits Our Ecosystem and Community

awk Mountain Sanctuary's mission is to conserve birds of prey worldwide by providing leadership in raptor conservation science and education, and by maintaining Hawk Mountain Sanctuary as a model observation, research, and education facility. This year, a \$20,000 grant to Hawk Mountain from an anonymous fund at the Community Foundation supported raptor counting - which is exactly what it sounds like. People sit and watch raptors (birds of prey), count how many they see, and record that information. The information is then used and accessed by organizations along the Kittatinny Ridge. This ridge skirts the northern tier of Berks County and is a mountain range that raptors follow for migration.

"The counting of raptors is important because understanding the migration patterns and numbers of raptors gives us insight into ecosystem health. In the past, when counters saw fewer raptors, scientists figured out that it was caused by poor farming practices and an increase in developed areas. Scientists spoke with local developers and farmers about healthier practices. They later saw an uptick in raptors again," said Emily Smedley, the Community Foundation's environment and energy program officer.

Since the spring, Hawk Mountain's Director of Conservation Science, Dr.



Laurie Goodrich, has been working to recruit raptor identification experts, including some who have completed Hawk Mountain's trainee program. With help from the grant, Goodrich set up an on-site workshop for the group and oversaw the design and printing of new educational outreach posters and materials that can be used at each counting site.

During the workshop, Jamie Dawson, Hawk Mountain's director of education, modeled raptor counting behavior and shared talking points to successfully engage the public in an informal but approachable way.

Counting raptors isn't just about observing the birds in the sky, it's about safeguarding the environment and strengthening communities. By investing in monitoring these birds of prey, we help to protect farmland and implement healthier environmental practices in the community as a whole.



A \$20,000 grant to Hawk Mountain from a fund at the Community Foundation helped support recruiting and training of raptor identification experts.



#### Spark of Compassion: An Animal Welfare Fund Honors a Teacher's Legacy

In his will, Gregory Heid created a fund for his late wife, Pamela A. "Pam" (Barrell) Heid. Pam was a lifelong resident of Kutztown and a local elementary school teacher. She was well-loved in the community, and when she passed, Gregory, who was a constable, created the fund in her memory.

one person's compassion can have on a community. Pam's legacy of love, kindness, and education continues to touch the hearts and lives of animals and individuals in Berks County, reminding all of us of the enduring power of a spark.

Health and Human Services Program
Officer, Cindy Milian, meets with one of the
beneficiaries of the Pamela A. and Gregory
W. Heid Fund for Animals at the Animal
Rescue League of Berks County.

Gregory knew that Pam's passion for animals was inseparable from her identity as a teacher, and he wanted to find a way to honor her memory while making a difference in the lives of animals in need. Gregory established the Pamela A. and Gregory W. Heid Fund for the Animals. This fund provides grants to animal welfare organizations for the direct support of animal care, food, or medicine.

For the past two years, the grant from this fund was awarded to the Animal Rescue League of Berks County (ARL). ARL's mission is to protect animals, provide a haven, and promote innovative programs and services to help both people and animals in need throughout Berks County.

"Our staff members are immensely grateful that this grant allowed us to save many more lives than we could have otherwise," said Ashley Mikulsky, Chief Development Officer of the Animal Rescue League.

The Pamela A. and Gregory W. Heid Fund for the Animals stands as a testament to the incredible impact





# Scholarship Funds Honor Legacies and Make a Difference for Local Students

ore than a century ago, Marie Hidell, Eleanor Cassidy, and Mary J. Scheirer lost their lives while serving as nurses during World War I. All three were graduates of Reading Hospital's nursing program. Today, the Alumni Association of The Reading Hospital School of Health Sciences -Nursing Program Scholarship Fund honors their legacy, and the legacies of countless alumni, by helping students continue their education. This year, the fund awarded scholarships to nine nurses who are members of the Alumni Association of The Reading Hospital School of Nursing or who graduated from the School of Nursing.

"This scholarship helped me further my education without having an extra financial burden," reported a scholarship recipient from Kutztown.

The Alumni Association scholarship fund is one of more than 125 the Community Foundation manages to honor legacies and support local students. Since its inception in 1994, the Community Foundation has awarded \$12,955,378 in scholarships to Berks County students, including this year's total of \$610,000.

To learn more about creating a fund or applying for a scholarship, visit www.bccf.org.





Each spring, the Community Foundation hosts a luncheon that brings together student recipients with those who made the scholarships possible.

## Year in Review

#### Board

#### Officers\*

Susan N. Denaro, Esq., Chair Attorney, Georgeadis | Setley

Kevin K. Murphy, President, Berks County Community Foundation

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

#### Directors\*

Lyn Camella-<mark>Rich</mark> Former Wealth Management Advisor, Merrill Lynch

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

Dr. Thomas F. Flynn Former President of Alvernia University

Carissa Johnson, MBA Magisterial District Judge District Court 23-1-02

Kevin K. Murphy President, Berks County Community Foundation

Gabriela Raful, Esq. Senior Partner, Galfand Berger, LLP Douglas F. Smith, Assistant Treasurer Vice President, Mid Penn Bank

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

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

Michael J. Rowley, CPA/ABV, CVA, CFF Senior Director, Herbein

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

Rick L. Stoudt, Jr.

Executive Vice President,
High Construction Company

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

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

#### Committees

#### **Executive Committee**

Susan N. Denaro, Esq., Chair Lyn Camella-Rich Michael J. Rowley, CPA/ABV, CVA, CFF Kevin K. Murphy Jay R. Wagner, Esq. Alfred J. Weber Ramona Turpin

#### Governance Committee

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

#### Audit Committee

Michael J. Rowley, CPA/ABV, CVA, CFF, Chair Stephen M. Fritz Vicki O. Ebner, Esq. Susan N. Denaro, Esq. Charles E. Lumis, CPA Douglas F. Smith J. William Widing III, Esq.

#### Finance Committee

Michael J. Rowley, CPA/ABV, CVA, CFF, Chair Susan N. Denaro, Esq. Vicki O. Ebner, Esq. Stephen M. Fritz Kevin K. Murphy Douglas F. Smith J. William Widing III, Esq.

#### **Investment Committee**

Lyn Camella-Rich, Chair Stephen M. Fritz Charles E. Lumis, CPA Susan N. Denaro, Esq. Kevin K. Murphy P. Sue Perrotty Douglas F. Smith J. William Widing III, Esq.

#### Staff

Frances A. Aitken, CPA Chief Operating Officer

Vivi Anthony Executive Assistant

Erica M. Caceres Communication Manager

Sally Cox Finance and Operations Administrator

Daniel Gombar Grants Management Administrator

Zoraida Gonzalez Receptionist

Julie Hartman Senior Accountant

Cindy Milian Health and Human Services Program Officer

Karen A. Miller Senior Fellow

Kevin K. Murphy President

Monica Reyes Vice President for Programs and Initiatives

William R. Sheeler Senior Fellow

Kim Sheffer Lifelong Learning Program Officer

Emily A. Smedley Environment and Energy Program Officer

Heidi Williamson Chief Strategy Officer

Staff as of July 1, 2023.

<sup>\*</sup> Officers and Directors as of July 1, 2023.

<sup>\*\*</sup> Serves as an officer, not a board member.

#### **Financial Position**

Berks County Community Foundation, Inc. and Supporting Organizations Combined Statements of Activities I Years Ended June 30, 2023 and 2022

	Assets	2023	2022
	Cash and cash equivalents	\$ 4,183,198	\$ 4,388,737
nent Policy	Prepaid Expenses	64,309	37,489
J	Contributions receivable, net	20,730	48,054
	Beneficial interest in trusts	946,518	927,481
policy of Berks County	Property and equipment, net	67,116	47,623
ndation is similar to	Building, net	4,220,688	4,126,937
nmunity foundations.	Land	243,754	243,754
has a diversified and	Loans and interest receivable, net	278,954	315,067
io. The objective of	Investments, at fair value	113,953,383	109,998,232
policy is to provide	Total assets	\$123,978,650	\$ 120,133,374
l preserve and grow	Liabilities and Net Assets		
Foundation's assets,	Accounts payable	\$ 111,682	\$ 78,194
a consistent stream	Grants payable, net	1,493,698	1,696,056
sue grant <mark>s and</mark>	Accrued expenses	110,817	189,402
nual distributions	Notes payable	1,641,927	1,707,386
ty Foundation are	Annuity payment liabilities	31,585	39,671
ted at 4.5 percent of	Funds held as agency endowments	3,986,752	3,144,088
alue of each grant and	Total liabilities	7,376,461	6,854,797
. When annual earnings	Net assets without donor restriction	115,655,671	112,351,096
	Net assets with donor restriction	946,518	927,481
istribution from a fund,	Total net assets	116,602,189	113,278,577
nined in endowment	Total liabilities and net assets	\$123,978,650 	<u>\$ 120,133,374</u>
	Revenue and Other Support		
ntanded to grow fund			
	Contributions	\$ 4,844,852	\$ 5,249,395
nsuring that the funds	Contributions Investment income	\$ 4,844,852 1,925,764	\$ 5,249,395 1,772,175
nsuring that the funds			
nsuring that the funds	Investment income Net realized gains on investments Net unrealized (loss)/gain on investments	1,925,764	1,772,175
nsuring that the funds urpose in perpetuity. e Community	Investment income Net realized gains on investments Net unrealized (loss)/gain on investments Net unrealized (loss)/gain from beneficial	1,925,764 3,885,346	1,772,175 8,040,329
nsuring that the funds urpose in perpetuity. e Community	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial  interest in trusts	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346)
nsuring that the funds urpose in perpetuity.  e Community vestment policy,	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial  interest in trusts  Other income	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346) 77,574
nsuring that the funds urpose in perpetuity.  The Community vestment policy, al statements,	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial  interest in trusts	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346)
nsuring that the funds urpose in perpetuity.  e Community vestment policy, al statements, urn, please visit	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346) 77,574
nsuring that the funds urpose in perpetuity.  e Community vestment policy, al statements, urn, please visit	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial  interest in trusts  Other income	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346) 77,574
nsuring that the funds urpose in perpetuity.  The Community Evestment policy, al statements, urn, please visit	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial	1,925,764 3,885,346 1,381,661 19,037	1,772,175 8,040,329 (23,603,429) (163,346) 77,574
nsuring that the funds urpose in perpetuity.  The Community Evestment policy, al statements, urn, please visit	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial interest in trusts  Other income  Total revenue and other support  Expenses  Program services General and administrative	1,925,764 3,885,346 1,381,661 19,037  144,959 12,201,619	1,772,175 8,040,329 (23,603,429) (163,346) 77,574 (8,627,302)
entended to grow fund ensuring that the funds ourpose in perpetuity.  The Community estimate policy, all statements, urn, please visit estall 610-685-2223.	Investment income Net realized gains on investments Net unrealized (loss)/gain on investments Net unrealized (loss)/gain from beneficial interest in trusts Other income Total revenue and other support  Expenses Program services General and administrative Fundraising	1,925,764 3,885,346 1,381,661 19,037  144,959 12,201,619  7,352,540	1,772,175 8,040,329 (23,603,429) (163,346) 77,574 (8,627,302)
ensuring that the funds ourpose in perpetuity.  ne Community vestment policy, al statements, urn, please visit	Investment income  Net realized gains on investments  Net unrealized (loss)/gain on investments  Net unrealized (loss)/gain from beneficial interest in trusts  Other income  Total revenue and other support  Expenses  Program services General and administrative	1,925,764 3,885,346 1,381,661 19,037  144,959 12,201,619  7,352,540 919,312	1,772,175 8,040,329 (23,603,429) (163,346) 77,574 (8,627,302) 6,907,705 649,646
ensuring that the funds ourpose in perpetuity.  ne Community vestment policy, al statements, urn, please visit	Investment income Net realized gains on investments Net unrealized (loss)/gain on investments Net unrealized (loss)/gain from beneficial interest in trusts Other income Total revenue and other support  Expenses Program services General and administrative Fundraising	1,925,764 3,885,346 1,381,661 19,037  144,959 12,201,619  7,352,540 919,312 606,155	1,772,175 8,040,329 (23,603,429) (163,346) 77,574 (8,627,302) 6,907,705 649,646 414,520

Net assets at end of year

\$ 116,602,189

\$ 113,278,577

#### Investm

The investment p Community Foun that of most com The Foundation h balanced portfoli the investment pe a return that will the Community F while providing a of revenue to is: scholarships. Ann by the Communit generally calculate the fair market va scholarship fund. exceed a year's d the excess is reta principal.

This strategy is in assets, thereby en will fulfill their po

For a copy of the Foundation's inv audited financia and our tax retu www.bccf.org or

# 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.



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
 610-685-2223

 Reading, PA 19601
 www.bccf.org