Berkshire Taconic Community Foundation
FACT SHEET

OUR MISSION: To build stronger communities and improve the quality of life for all residents of the region we serve.

REGION SERVED: Berkshire County, MA; Columbia and northeast Dutchess County, NY; and northwest Litchfield County, CT. In all, we serve 247,800 people in 3 cities and 70 towns within a 2,200 square mile area.

HISTORY: Established in 1987 in Salisbury, CT, moved to Great Barrington, MA, in 1998.

WHAT WE DO: Berkshire Taconic Community Foundation is a 501(c)(3) nonprofit organization that serves donors, nonprofit organizations and the communities of the tri-state region. Berkshire Taconic accomplishes its work by:

- Offering donors tools and expertise that enable them to achieve their financial goals and charitable vision
- Strengthening local nonprofit organizations
- Developing permanent community resources
- Providing leadership in addressing changing issues and needs in the community

ASSETS: Berkshire Taconic manages more than $85 million in assets, of which $31 million are endowed, permanent resources that will support the community in perpetuity.

INVESTMENT PERFORMANCE: Managed Pool average return:
5-year: 12.5% 2007: 9.9%

FUNDS: Approximately 500 funds, including 149 donor advised funds, 141 field of interest funds, 11 area funds, 24 educational enrichment funds

GRANTMAKING: In 2007, Berkshire Taconic distributed $7.4 million in grants and scholarships. Since 1987, Berkshire Taconic has distributed more than $70.4 million in grants and scholarships.

KEY FUNDING AREAS:
- Arts and Culture
- Education
- Environment
- Human Services
- Health

GOVERNANCE: Berkshire Taconic is led by its Board of Directors, 20 regional residents of diverse backgrounds from throughout the region:

Carmi Rapport, *Chair*	Sia Arnason	Sally W. Berg
Lo-Yi Chan	J. Williar Dunlaevy	Joan Dunlop
Thomas P. Falus	Ann Goodbody	Edward Hoe
Christopher Kennan	David Klausmeyer	Neil M. McCarthy
Charles P. O'Brien	Arthur S. Rosenblatt	J. Anthony Sheldon
Virginia Stanton Smith	Sarah S. Stack	Nancy I. Stahl
John Hoyt Stookey	John P. Tuke	Andrew C. Vickery

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