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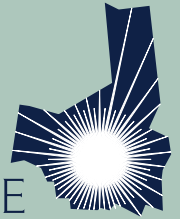
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THE COMMUNITY FOUNDATION OF HERKIMER & ONEIDA COUNTIES, INC.

Where a gift gives forever

Foundation LETTER

VOLUME XVIII | ISSUE I
SPRING 2008

Community Foundation "Invests in Vision" of Combating Autism at Kelberman Center

Most of us have heard of autism and probably known one or more persons with it. Our knowledge of the puzzle of autism continues to increase every day.

Autism is a complex developmental disability resulting from a neurological disorder that affects the functioning of the brain. Although it usually appears during the first three years of life, adults as well as children can have autism.

Its symptoms present themselves in a variety of combinations, from mild to severe. Communication challenges are often an area of great concern, since so much of our daily interaction depends on appropriate conversational and social skills.

Because people with autism process and respond to information in unique ways, they can have difficulty initiating or maintaining a conversation. In some cases aggressive or self-injurious behavior might be present.

Continued on page 4

Designed to bring out the potential in each child, the programs and services of The Kelberman Center also bring out the smiles.



From Peggy O'Shea, President & CEO

A Year of Remarkable Events!



Dear Friends,
I am pleased to have this opportunity to offer profound thanks to all of you who sent words and gifts of congratulations for our 55th

anniversary year. Just a year ago we were involved with creating **Keeping the Promise**, our wonderful history book that we unveiled in May and presented as our gift to the community.

Many thoughtful folks helped celebrate The Community Foundation's 55th anniversary with special donations. This newsletter includes a thank-you section acknowledging their generosity. Our trustees and staff join me in offering our heartfelt appreciation for these acts of kindness.

Perhaps the most remarkable "happening" of 2007 occurred in December with the creation of the M&T Bank/Partners Trust Bank Charitable Fund. When the two banks merged, they decided to create a philanthropic legacy for Partners Trust Bank and a vehicle to expand M&T Bank's continued commitment to the region. The \$4.1 million gift was third largest in The Foundation's history and pushed our total assets past the \$80 million mark.

It must be remembered that Partners Trust Bank, formerly the Savings Bank of Utica, and The Community Foundation have intertwined in the past. Three of the bank's presidents were Foundation trustees and our first executive director was a bank trustee.

*The Community Foundation of Herkimer & Oneida Counties, Inc.
Extends Its Appreciation to the Following Donors
Whose Special Gifts in 2007, Our 55th Anniversary Year,
Honored the Vision of Our Founders to
Provide for the Well-Being of This Community in Perpetuity.
Thank You for Helping Us Keep The Promise!*



LEADERSHIP GIFTS — ANNIVERSARY GIFTS

*Donations of \$5,500 and above received for
unrestricted grantmaking in recognition of our 55th year*

Adirondack Bank	David Griffith
G.W. Canfield & Son/ Anne Kuhn & Mark Canfield	William Locke
Joseph & Inez E. Carbone Foundation/ Don Carbone & Family	Linda Macartney
Charles & Elaine Constantino	Theodore & Melva Max
Patricia P. Couper	Mazloom Family Charitable Gift Fund/ Albert Mazloom
John W. Crego	Staffworks, Inc./ Anita A. Vitullo
Francis W. Darling*	Strategic Financial Services, LLC
	Trainor Associates, Inc.

NEW FUNDS

*We gratefully acknowledge the families and donors who created
a named fund and lasting legacy during our 55th anniversary year*

CCSD Foundation Fund	M&T Bank/Partners Trust Bank Charitable Fund
Charles A. Kaplan Family Fund	Mohawk Valley Community Action Agency Fund
Christopher & Virginia Kelly Family Fund	Pugliese Society Charitable Fund
F. J. Pugliese Family Fund	Richard Alexander Fund For The Boy Scouts of America
Family Planning & Education Fund	Stephen & Judy Sweet Family Fund
Give Back To Utica Fund	Thomas M. Lindsey Memorial Fund
J.K. & Hedy Anne Hage Family Fund	
John B. & Margaret T. Stetson Fund	
Keller Family Fund	
Nicholas & Susan Matt Family Fund	

*Deceased

THANK YOU

ANNIVERSARY GIFTS

Individual and corporate gifts received from the Annual Appeal celebrating our anniversary

Ann P. Allen
George F. Aney
Miriam Z. Balutis
Rabbi and Mrs. Henry Bamberger
Michael and Carol Bannigan
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Dr. William L. Boyle, Jr.
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Mark and Marcia Elias
Estate Planning Law Center
David Esterly and Marietta Von Bernuth
Express Systems Integration
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First Source Federal Credit Union
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Charles and Norma Lee Haskin
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Joseph G. Karam
Miriam D. Kashiwa
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Philip Klinker and Honorine Wallack
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Brian and Peggy O'Shea
Justin and Laura O'Shea & Family
Gavan and Molly O'Shea
Rory O'Shea
O'Shea, McDonald, Panzone & Stevens, LLP
Douglas and Karen Pirnie
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Corinne Ribble and Robert Simpson
Alice Root and John Dahlin
Denise and Carmen Salvatore
Faye Short
Robert and Sadieann Spear
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David and Patricia Smalley
William and Elizabeth Stevens
Strategic Investment Advisors, Inc.
Christopher Surace
Richard and Elizabeth Tantillo
Terrill Tolles
Utica First Insurance Company/
Richard Zick
Utica National Group Foundation
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Robert B. Wallace, M.D.
The Wallen Family
Eleanor W. Wertimer
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Elizabeth Williams
Richard and Jean Williams
Mark and Elaine Woroby

"The Community Foundation stepped up and said 'yes, we believe this has the potential to meet a community need. We're investing in your vision!'"

Helen Stepowany, Executive Director | The Kelberman Center

Kelberman Center

Continued from page 1

Sensory integration problems are common, with the senses being over- or under-active, resulting in different reactions to things seen, heard, tasted or touched.

Early Intervention Works Best

It is estimated that as many as 1.5 million Americans have autism today, with the condition affecting one out of every 150 children, including hundreds in Herkimer and Oneida counties. Yet each one is unique, having his or her own personality, needs, strengths and potential. The good news is that with proper diagnosis and treatment, many individuals see significant improvements. The earlier the intervention starts, the better.

Until recently, however, local individuals with the disorder and their families had to travel 100 miles or more to obtain such services, often waiting months just for the initial appointment. In 2005 that changed forever with the establishment of the Kelberman Center, an affiliate of Upstate Cerebral Palsy. The operation is based in the Annie P. Tilton Center at Upstate Cerebral Palsy's 1601 Armory Drive campus in Utica.

Stepping Up

A \$100,000 grant from The Community Foundation's Frank W. Baker Fund was instrumental in establishing the center. Executive Director Helen Stepowany calls it an "investment in a dream," which turned what had been a virtual center that she and others had only imagined, into reality.

Recounted Stepowany, "The Community Foundation stepped up and said 'yes, we believe this has the potential to meet a community need. We're investing in your vision!'"



She explained that The Foundation's support bolstered the development efforts of the center's committed board and within six months of receiving the grant, the agency was able to recruit the first two members of its professional staff — Beth A. Myers, director, and Robert E. Myers, director of consultation and behavioral services.

Stepowany also credits much of the center's initial success to the leadership of board chair Dr. Michael Kelberman, an area cardiologist whose family was touched by autism. The center was named in his honor.

Still young but now well-established, professionally focused and highly energized, the center is fighting autism on three fronts: with diagnosis, evaluation and consultation; programs and services; and community education and training.

Just as everyone it serves has the potential to make a difference in the world, the center is making a difference in the lives of local children and adults who are living in the world of autism.



EIGHT NEW FUNDS JOIN

*Our Family of Philanthropy*The “Give Back To Utica Fund” —
Inspired and Visionary

It is with much excitement that The Community Foundation announces the launching of the innovative and promising “Give Back To Utica Fund” that was recently featured in the *Observer-Dispatch*. The initiative is now a component fund of The Foundation.

Unique Purpose

The fund’s unique purpose is to support programs that will promote the Greater Utica area to young people, encouraging them to view Utica as a desirable place to work and live through a network of internships and sampling of opportunities.

The vision for the fund began with former Utica resident and 1967 graduate of Utica Free Academy Steve Oram, now a practicing attorney in Chevy Chase, Maryland. In his words, “Give Back To Utica is a concept wherein those of us who have left the community as well as those who remain can work together to strengthen the allegiance of future generations to the city of Utica.”

Grateful

Oram is grateful for the lessons he learned growing up locally and explained that they were his inspiration for creating the fund. Noting the role the city’s diversity played in his own education, he said, “It provided the small-town character. It taught me about community and accepting people who were not completely identical to me.”

He realizes that many professionals have left the area in search of bigger opportunities and that this trend continues to be a critical threat to the community’s future.

It is Oram’s hope that the fund will

have widespread appeal to both local donors who are frustrated by the constant drain of vibrant young talent as well as to former area residents who might contribute toward helping the city in a strategic way.

In fact, the response was immediate. The Foundation has already received numerous calls from people asking how to give. One young woman, now a Boston attorney, called to say, “I have always wanted to do something, but I didn’t know what.”

The “Give Back To Utica Fund,” which Oram will oversee initially, will work with a steering committee in concert with Mohawk Valley EDGE and others.

Oram feels strongly that ultimately the leadership must be developed locally, but that encouragement and financial backing from nonresidents will drive the fund and provide the stimulus to keep to it “on mission.”

Donations, large and small, have already built the fund to over \$15,000. Oram’s goal is \$1 million. In his words, “By addressing the Utica ‘brain drain’ and by providing real opportunities for young people to stay in Utica, future generations will come back to their home city.”

The Community Foundation expresses its gratitude to Steve Oram for sharing his dream through the creation of this fund. His vision is sure to be embraced by many who have similar feelings about this area. If you are among them, we encourage you to consider a gift that will help this fund grow. Contact The Foundation office to support the initiative, ask a question or share any thoughts you might have about the “Give Back To Utica Fund.”

In the last few months of 2007, The Community Foundation welcomed several new funds reflecting a wide range of interests.

J.K. & Hedy Anne Hage Family Fund

A donor-advised fund created by a dynamic, community-minded couple to pursue their strategic giving, supporting a variety of causes and organizations to which they feel committed and connected.

John B. & Margaret T. Stetson Fund

A donor-advised fund established by a caring couple who wish to continue to provide support for worthy causes and vital nonprofits that do meaningful work to help others within the community.

Mohawk Valley Community Action Agency Fund

An agency fund created by this nonprofit to build an ongoing stream of income for its programs and services through the development of a permanent endowment.

Stephen & Judy Sweet Family Fund

A donor-advised fund created by an active couple through which they will focus their charitable giving to foster the growth and enrichment of the area in which they live, work and are raising their family.

Nicholas & Susan Matt Family Fund

A donor-advised fund created by a Community Foundation trustee and her husband which will serve as their springboard to address critical issues within the community and support charities having real impact today and in the future.

F. J. Pugliese Family Fund

This acorn fund is being established through family gifts and memorials to Francis J. Pugliese as a lasting legacy to a man who is widely remembered within the community. A donor-advised fund, it will bear the family name forever and one day make grants to support causes about which this family cares deeply.

M&T Bank/Partners Trust Bank Charitable Fund

This new and very large advised fund came to The Community Foundation as a result of the acquisition of Partners Trust Financial Group, Inc., and Partners Trust Bank by M&T Bank. The assets, in excess of \$4 million, created our largest donor-advised fund and represented the largest single gift ever received by The Foundation outside of those that have come through an estate as a bequest. Its impact will be expansive. (For more information, see “Year of Remarkable Events” starting on page 2.)

“What About Me?” Assures Kids They Are Not Forgotten

Anthony and Mary were the only ones present when their father died of a heart attack. Already coping with a learning disability, Mary withdrew even more. Anthony showed his pain through behavioral problems.

Shawna stood alone at her graduation, scanning the audience for someone who might be there for her. Her mom, a drug addict, was not present, nor were any siblings. Shawna never knew her father, she only thinks “she knows who he is.”

Mirela, a young Bosnian girl, had seen her brother shot in the war. Fearful for their lives, the family was forced to flee with nothing but the clothes on their backs, leaving their young son dying on the ground behind them. Mirela was never allowed to express her horror and grief. She developed an eating disorder and came close to death.

Even before their mom’s body was found, Ashley and Adam had been uprooted to a father who was incapable of caring for them. Although their grandmother is doing the best she can to care for them, she faces numerous challenges of her own. Their baby sister lives in yet another home.

These heart-wrenching stories might seem to come from the imagination of a Hollywood scriptwriter. But they are, in fact, very real accounts of losses that boys and girls in Utica have experienced. They are only examples of countless, similar tragedies that continue to tear at the hearts of many children in the region’s largest city.

In 2007, the “What About Me?” program served 485 children, and conducted 836 group sessions and 653 individual sessions.

While nothing can undo the losses these youngsters feel, the “What About Me?” program of Hospice and Palliative Care, Inc., is helping them deal with their grief and move on in their lives. The program has been supported by two grants from The Community Foundation, \$20,000 in 2006 and \$17,000 last year, both from the Willis A. & Nettie Robinson Payne Fund, an unrestricted endowment.

Delivering Comfort

Social worker Judy Tastor explained that although Hospice & Palliative Care had always offered bereavement services for children, the agency’s location in New Hartford made it difficult or impossible for inner-city children and their families to access the service. A visit from a woman who took a cab to the agency to get help for a child in Utica underscored the need for such service. Hence, “What About Me?” was developed and launched.

Tastor and a colleague deliver the services on-site to elementary and junior-high-school students at 10 Utica schools. From drawings to dreamcatchers, arts and crafts are vehicles through which the youngsters express their grief and emotions. They also create personalized squares that are woven into quilts, which provide both literal and symbolic comfort.

The kids meet in groups of about eight,



The loss of a parent or loved one is a life-changing event at any age but it is especially devastating for children. The “What About Me?” program of Hospice and Palliative Care helps youngsters in the Utica City Schools cope with these losses and move forward in their lives. Consoling each other and expressing their feelings through drawings and other arts and crafts activities are among the most powerful healing tools.



getting together weekly or every other week, for an 8-10 week period. They are referred by school personnel, social workers or family members. There is a waiting list for the program.

Addressing the Pain

“When these kids first meet, their reaction is always to console each other,” says Tastor. “Sometimes they are surprised to learn that others are experiencing the same feelings they are.”

In one instance, a group included a child whose father had been killed, as well as the child of the man who had gone to jail for the killing. Both had lost a parent, one to death, the other to incarceration.

“What has surprised me the most about the need for this service is the multiplicity of losses these children have undergone,” Tastor said. “Some have lost a parent, relative or friend through death; others, a parent through divorce; and still others, their home or country. The losses have come in a variety of ways and often a single loss impacts several lives.

“We try to help by encouraging them to express their pain and letting them know they are not alone. Our hope is that if they can express their feelings in positive ways, they will be less likely to grow up to inflict similar pain on others — by committing violence, for instance. For some of these kids, their role models have not addressed this pain well.”

Remarkable Events

Continued from page 2

The new fund will be The Foundation’s largest corporate donor-advised fund, with the advisors comprised of representatives from M&T Bank and the former Partners Trust Charitable Foundation. The advisors will work closely with Community Foundation staff to earmark the best projects in which to place their charitable investment dollars.

Donor-advised funds allow individuals, families and corporations to make gifts to The Community Foundation and then remain actively involved in suggesting uses for the gift. Donor-advised funds help build a tradition and

culture of giving while maintaining a very personal approach. Establishing a fund also creates a legacy vehicle, a way for people to *give forever* to the community they have called home.

2007 was a remarkable year for your community foundation — The Community Foundation of Herkimer & Oneida Counties. We are grateful to all of those who helped make it so and who continue to participate in The Foundation’s ongoing growth and service to our community.

My best to you — always,

Peggy



Officials gathered at The Community Foundation office in December to announce the establishment of the M&T Bank/Partners Trust Bank Charitable Fund. At \$4.1 million, it was third largest gift ever to The Foundation. Pictured are, from the left, first row, John Livingston, Community Foundation board chair; John Zawadzki, former president & CEO of Partners Trust Bank; Peggy O’Shea, Community Foundation president & CEO; Alan J. Naples, president, central New York Division of M&T Bank; and David Manzelmann, Utica market president of M&T Bank. In the top row is Gordon M. Hayes, Jr., former Partners Trust Bank director and the first executive director of The Community Foundation.

THE COMMUNITY FOUNDATION OF HERKIMER & ONEIDA COUNTIES, INC.

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Foundation Partners with Excellus BlueCross BlueShield, United Way in Board Leadership Program

Central to the performance of a nonprofit organization is an effective board — and at the heart of an effective board is strong leadership.

While today nonprofit board members can include some of the community's most capable and committed leaders, fulfilling the role brings such challenges as transitioning one's professional skills to the nonprofit arena and being effective while balancing an already demanding workload and schedule.

Helping these individuals optimize their effectiveness as board leaders is the focus of the Partnership for Nonprofit Enterprise Excellence. Established in the Rochester, New York, area in 2002 as a coordinated effort of the Center for Governmental Research, The Lifetime Healthcare Companies, Rochester Area Community Foundation and United Way of Greater Rochester, it expanded into the Greater Utica area last fall — with an inaugural eight-month program that began in October and will run through June.

The Community Foundation of Herkimer & Oneida Counties is a partner in the expansion, along with the United Way of Greater Utica and Excellus BlueCross BlueShield of the Utica Region.

The syllabus of the program encompasses a series of eight seminars, each of which features a presentation and discussion on a specific nonprofit leadership topic.

Subjects being covered include corporate structure and responsibilities, financial oversight, development, strengthening missions, and planning and performance management.



The Next Level

Approximately a dozen members from area nonprofit boards are participating in the 2007-2008 program. Harrison J. Hummel IV, 1st vice president of the Herkimer Area Resource Center, is one of them.

"Often, board members learn about being on a board as they serve," he said. "The Board Leadership Program develops board members into board leaders and grooms them to take their organizations to the next level."

Clarifying Duties and Responsibilities

Lisa Miller, board president of The Peacemaker Program, is similarly

enthusiastic. "The board leadership seminar has enhanced not only my own leadership skills, but it has made our board stronger than ever. The tools that I take back to our board meetings have made us more effective, more productive, and most of all, have clarified our duties and responsibilities as board members.

"This information helps us to govern more effectively, which helps our organization perform at optimal levels — and that means more people get the help they need. I see this program as a great benefit to the community as a whole."

"In a time of shrinking resources and growing demands for services, community-based nonprofit organizations are facing the unavoidable reality of having to do more with less," noted Eve Van de Wal, vice president for administration of Excellus BCBS.

"Through this program, we're providing nonprofit board leaders with the education and tools they need to successfully lead their organizations."

"The Partnership for Nonprofit Enterprise Excellence is not only a wonderful concept, it is a very engaged and very committed group that is building strong nonprofit board leadership for the future," added Community Foundation President & CEO Peggy O'Shea. "We are delighted to be part of it."

Fun for Inner-City Youngsters

Thomas M. Lindsey Fund Grant Supports Boys & Girls Club Skating Program



The days and nights of winter can grow cold and long for everyone, especially youngsters in Utica's inner-city. For them, recreational opportunities are not only scarce, they can be difficult to access.

The Boys and Girls Club of Utica is changing that with an innovative ice skating program being made possible in part by a grant from The Community Foundation's Thomas M. Lindsey Memorial Fund.

The \$1,000 grant has provided 25 pairs of ice skates that participants can use on a rink created in the Club's F. Eugene Romano Court within the Field of Dreams complex at its Lansing Street center. The facility is illuminated, allowing for both daytime and evening skating.

"The Court is a beehive of activity during the nice weather," explained Executive Director Wayne Baran, "so we thought, why not put it to a great use in the winter as well.

"The skating program is designed to provide an attractive, safe, fun place where kids can be active and enjoy themselves during the winter. Not only can they learn to skate, they exercise, share, work together and build friendships."

They also enjoy refreshments and, on Friday nights, teens can stay for a movie after skating. There is no cost for the program.



The Boys and Girls Club's Ryan Box (left) shares tips for properly lacing up and adjusting ice skates with Xavier Ross. An experienced skater, Ryan helps supervise the program, making sure the youngsters learn safety as well as such fundamentals as maintaining balance, and basic forward and backward movements. "Most of these kids have never been on skates before," said Ryan, "so we emphasize safety precautions before going out to have a good time on the ice."

Along with expressing his appreciation to The Community Foundation for the Lindsey Fund grant, Baran acknowledged the interest and helpfulness of Utica Fire Chief Russell Brooks and his department for their efforts to form the ice rink.

In addition to the Lindsey Fund grant for the skates, The Community Foundation supported construction of the Field of Dreams complex with a \$25,000 grant from the Brigham Family Fund in 2005.

Many Ways To Show You Care

Basics of Giving to The Community Foundation

Gift Date — The day The Foundation receives your donation, regardless of its type.

Thank-You — All gifts are acknowledged in writing, usually within 48 hours.

Cash — Please do not send cash in the mail. Cash gifts, however, may be delivered to The Foundation office. We will verify the amount and provide an immediate receipt.

Checks — Should be made payable to "The Community Foundation," with the fund, if any, for which it is earmarked indicated on the memo line, gift envelope or in a simple note. The same applies to money orders. Year-end checks must be dated, mailed and postmarked on or before December 31 and received within seven business days to be counted in that gift year.

Credit Cards — Visa, MasterCard and American Express are accepted. Account numbers are kept secure and never entered into The Foundation's computer system. The charge receipt is mailed to you in the acknowledgement.

Online Gifts — Can be made at www.foundationhoc.org. Select "Online Giving" and follow the instructions. A receipt is e-mailed to you.

Stock — Can be wired from your broker to ours within 48 hours for commonly traded securities. To expedite the transaction we must give your broker the transfer and account numbers and find out what stock is coming. The gift date is when the stock is received into our account electronically. Stock in certificate form requires a stock power and more time. Mutual funds require 2-3 weeks to be transferred. (Allow ample time for year-end giving.)

Non-Cash Gifts — Gifts of real estate, vehicles, personal property and business interests may be accepted pending their review and compliance with special policies and procedures, as well as pertinent IRS regulations and applicable law.

Planned Gifts — Through a trust, life insurance, IRA, retirement account or bequest, planned gifts can be effective giving vehicles. The Foundation would be happy to assist you and your financial advisor in determining their value. Our assistance is always provided at no cost.

Gifts OF TRIBUTE

The following donors have honored special people in their lives through a gift of tribute. These contributions were received between September 1 and December 31, 2007. The donor is listed below the honoree.

In Honor Of

Ann P. Allen

Georgiana Roberts Ide

Sebastian Cuccaro Alamin

Ronald & Sheila Cuccaro

Miriam Z. Balutis

Robert & Sadieann Spear

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C. Millar & Barbara Brace

Margaretta Millar Brace

Maxwell Brace III

Mary Louise G. Millar

Florence K. Millar

Maxwell Brace III

Brian O'Shea

Gavan & Molly O'Shea & Family

Rory O'Shea

Gavan & Molly O'Shea & Family

Justin & Laura O'Shea & Family

Rory O'Shea

Peggy O'Shea

Gavan & Molly O'Shea & Family

Rory O'Shea

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Nick & Trudy Menzento

Dr. Patricia Sullivan

Christopher Cline

Terrill Tolles

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Brett & Michelle McCarrick Truett

Peggy O'Shea

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In Memory Of

D. Nelson Adams, Esq.

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Bernuth

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Alfred J. Audi

Glory Rasi

Ruth Sackett Baxter

Donovan Middle School -

Social Club

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Virginia Carey

Thomas W. Carey

Classmates of UFA 1964 who

served in Vietnam

Judith A. Burkett

A. Richard & Judith Cohen

Albert & Isabella Worthen

Father Edwin T. Comeskey

Patrick & Margaret Comeskey

Roderick Coupe

James & Diana O'Looney

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Steven & Carole Brown

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Bukzin & Associates, Inc./Jay Bukzin

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John L. Curry, Jr.

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Michael Donalty & Lynne Minisce

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Walter & Mary Austin Pratt

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Joseph & Evelyn Tierno

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Donna M. Vitagliano

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Jeffrey & Melissa Voivoda

Esther R. Donovan

John & Mary Ashwell

The Boilermaker Road Race

Edward & Barbara Byrnes

Richard & Andrea Dinerstein

Bernadette Eichler & Carol Fox

Jim & Norma Gemza

Tom & Mary Harowski

Colonel James G. Hill

MetLife Unit 14

Cathy M. Newell & Rick Walters

NY Newspaper Publishers Assn., Inc.

Irene Pugh

Earle C. Reed

Bonnie Sanderson

Robert & Catherine Santonastaso

United Way of the Greater Utica

Area/Memorials

David & Patricia Zehr

Senator James H. Donovan

Gannett Foundation Inc./Matching

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Elizabeth Eisengrein Meehan

Margaret R. Deande

Linda G. Allen

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Robert & Jeffrey Imobersteg,
Karen Calburn & Beth Dunlay
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Mark & Kathleen Rich
- Charles A. Fitzgerald**
Jean P. Fitzgerald
- Sophie Forlano**
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- Harriet Sonne Frankel**
Richard H. Frankel
- Peter D. Fraser**
Thomas & Sarah Fraser-Almeida
Richard Fraser
Robert B. Fraser
William & Jane Fraser
L. Patrick & Patricia Hanemann
- Richard H. Gates**
Dr. William L. Boyle, Jr.
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Frances K. Gilroy
- Dorothy Hackett**
Central Square Transportation Club
- Nancy Harrington**
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- Eloise Harrington Beerhalter**
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Gerald & Carole Freeman
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- Harold Heintz**
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Marilyn Hoffman Borg
- Antionette George Holland**
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Eileen G. Hubbard
- James W. Hyde, Jr.**
Leona Hyde
- John Jennings**
Joseph & Joan Romanow
- Andrew Kates**
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Barbara S. Kates
Jeffrey & Donna White
- George & Nellie Kazanjian**
Miriam Kazanjian
- Kenneth Kazanjian**
Miriam Kazanjian
- Warnick J. Kernan**
Mary Angela Kernan
Mr. & Mrs. Leslie W. Kernan
- Beatrice Kleek**
Violet Foucher Hapanowicz
- Barbara Kulik**
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- Peg Mark**
Marie C. Mark
- Howard A. Marsh, Jr. & Bradley E. Marsh**
Susan A. Korosec
- F.X. Matt II**
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F.X. III & Pamela Matt
- May & Costello Families**
Suzanne M. Bakiewicz
- Adele Sarah Mazloom**
Phillip & Lori Felice
Joseph & Madeline Hobika
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Brian & Peggy O'Shea
Agnes Rasi & Glory Rasi
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- Elaine Eisengrein O'Brien**
Elizabeth Eisengrein Meehan
- Raymond O'Dowd**
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An “E-Mail Conversation”

Why is The Community Foundation a Good Choice for a Donor-Advised Fund?

The Foundation is asked this question often. Recently, President & CEO Peggy O’Shea engaged in an enlightening e-mail exchange with a donor who was looking into creating an advised fund. We are pleased to offer these excerpts from it.

Donor: Candidly, my wife and I have been comparing your donor-advised fund with commercial funds from major financial institutions like Fidelity. Apparently, a donor-advised program through a financial institution requires no minimum balance and less control. We could pay the fund down to zero at any time. Your donor-advised fund requires The Foundation to retain \$10,000 in perpetuity. We are mulling over the differences — any advice?

O’Shea: Differences do indeed exist. Community foundations build endowments — community wealth. We do so in partnership with caring individuals who are in it for the long haul, often seeing our partnership as leading to a family legacy. The \$10,000 minimum is the permanent piece that “**gives forever**,” even after the original advisors are no longer there to make recommendations.

The Community Foundation is about building a relationship. It is about engaging in a dialogue about community needs and sometimes funding those needs in concert, so your giving is powerful and effective.

All that being said, and with every bias that you know I have, there are many wonderful people in our community who have elected to have their donor-advised fund with a commercial institution. Philanthropy is philanthropy! Whatever decision you elect to make will be the right one.

Donor: Thanks for your generous response. Since philanthropy is the overall goal, why keep \$10,000 in the fund...as a gift to yourself?

O’Shea: I do enjoy jousting over the finer points of community foundation philanthropy. By definition, a community foundation is a tax-exempt, nonprofit institution with a goal of building permanent, named component funds to benefit a defined geographic area. The fund in your family’s name will make grants forever because of this endowment piece — long after donations to it have ceased. Your family, no matter where its members reside as generations come and go, **will always be important here.**

Donor: One more — other institutions do not assert the right of ultimate authority over grants from the fund, only that the recipients be legitimate charities. Why do you?

O’Shea: It’s not that we insist on “ultimate control,” the law requires us to have it. Under the Pension Protection Act of 2006, the IRS states that the charity (us) must provide a written statement affirming its legal control over a donor-advised fund. Other financial institutions have exactly the same legal control and requirement. We are simply more transparent about it.

One additional note, The Community Foundation offers a grantmaking benefit that commercial institutions can’t. Because The Foundation is in constant touch with nonprofit organizations and causes across the region, we are aware of community needs and opportunities that can enhance a donor’s grantmaking.

Our true mission is to nurture the intangible sense of community that links people together in a larger vision of what they can accomplish and what must exist if the community is to thrive. Please know that we will completely understand if you elect to create an advised fund elsewhere. The door will remain open for you here. At The Community Foundation, you can come home again, my friend.

We are pleased to report that The Foundation has welcomed this generous donor and his wife into our donor-advised-fund family!

Grant Facilitates Merger of New Horizons with YWCA of the Mohawk Valley

For a century and a half, the letters Y W C A have meant a better life for women and girls. What began as a boarding house for women moving from farms into the city to pursue educational and job opportunities has grown to become the largest multicultural women's organization in the world.

The YWCA of the Mohawk Valley has been part of that international movement for over 120 years. Like its sister chapters around the globe, it has evolved continuously to meet the ever-changing needs of women, children and people of color in Herkimer and Oneida counties.

While those needs can be for health, fitness and professional development, today they can also be far more poignant — involving such matters as sexual assault, domestic violence, child abuse and racial mistreatment. Even in these crises, however, the YWCA continues to be there for women and girls in their time of need.

Safety and Support

One of the ways in which the YWCA of the Mohawk Valley is now there for women ages 16-21 who are unable to live at home — often due to neglect or abuse — is through the New Horizons program.

Founded in 1993 and located on Eagle Street in Utica, New Horizons provides a safe place to live along with counseling and other critical support services.

New Horizons serves an average of between six and nine young women at any given time, all of whom are required to attend school or be engaged in some work in the community while receiving services. Emphasis is placed on helping them become independent and achieve worthy life goals.

The merger of New Horizons with the YWCA was made possible in part by a \$45,000 grant from the Frank W. Baker Fund, an unrestricted fund of The Community Foundation. The funding supported several important components of the merger, including a part-time project coordinator whose efforts assured an informed and efficient consolidation process, audit fees, and equipment and renovations needed at the New Horizons house.

YWCA Executive Director Denise Cavanaugh describes the merger as a good fit for both organizations. “It complemented the domestic violence and related services the YW was already providing to the region and it has enabled New Horizons to benefit from the broader administrative capabilities and economies of scale the YWCA brings to the table.

“The bottom line is that local young women now have an even better resource available to them for meeting their needs at a very difficult time in their lives.”



eliminating racism
empowering women
ywca



The YWCA's New Horizons program provides a safe residence along with counseling and other support services for local young women who are unable to live at home, usually due to abuse or neglect.

THE
COMMUNITY
FOUNDATION
OF HERKIMER & ONEIDA COUNTIES, INC.

cf NATIONAL STANDARDS™

Foundation LETTER

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Grants

Over \$1 Million in Latest Grants and Scholarships Touching Lives Across the Region

Between September 1 and December 31, 2007, The Community Foundation awarded 122 grants totaling \$1,323,729, plus 19 scholarships amounting to \$14,213. Listed below are the grants, including the funds from which they were derived.

Agency Grants

Agency grants are generated by funds established by nonprofit organizations to provide long-term support of their charitable mission.

Arts Guild of Old Forge, Inc.	\$9,497.00
The Arts Guild of Old Forge Inc., Fund	
Mohawk Valley Institute for Learning in Retirement.	\$1,275.00
Mohawk Valley Institute for Learning in Retirement Fund	
Oneida County Historical Society	\$6,000.00
Oneida County Historical Society 2nd Century Fund	
St. Mary's School	\$25,000.00
St. Mary's School Endowment Fund for Scholarships & Programs	
FORCE/St. Mary's School Fund	
St. Mary's/Marion LaFaro Scholarship Fund	
Sculpture Space	\$2,911.00
Sculpture Space Endowment Fund	
The Women's Fund of Herkimer & Oneida Counties, Inc.	\$5,000.00
Annie's Fund	

Discretionary Grants

Discretionary grants emanate from funds that are unrestricted in their purpose, allowing income from them to be used to meet the most urgent community needs.

ENHANCING EDUCATION

Utica City School District	\$5,000.00
Andrew J. & Bertha W. Burdick Fund	
George H. Gschwind Fund	
Meet the author program at Albany School with Uzo Unobagha (reading and book giveaway)	

ENSURING PUBLIC HEALTH

Bassett Healthcare	\$50,000.00
Frank W. Baker Fund	
Wesley & Marion Small Fund	
Purchase of mobile screening vehicle	

Little Falls Hospital	\$15,000.00
Harry F. Dise Fund	
Heart equipment	
Rome Memorial Hospital	\$75,000.00
Rosamond G. Childs Fund	
Frank, Mame and J. Lansing Reed Fund	
Challenge grant to assist in fundraising for the construction of a Women's Imaging Center	

IMPROVING THE QUALITY OF LIFE

Adirondack Railway Preservation Soc., Inc.	\$1,300.00
Warnick J. Kernan Fund	
Request on behalf of Christmas on Main Street for Christmas lights	
Arts Guild of Old Forge, Inc.	\$25,000.00
Wesley & Marion Small Fund	
Request on behalf of the Garden Club for the Point Park project	
City of Rome	\$25,000.00
Rosamond G. Childs Fund	
JF Kennedy Civic Arena Renovation Project	
Dolgeville-Manheim Public Library	\$5,000.00
Burrell Fund	
Roof repair	
Dolgeville-Manheim Public Library	\$35,000.00
Robert R. & June F. Farrington Fund	
Wesley & Marion Small Fund	
Heating project	
Landmarks Society of Greater Utica	\$125,000.00
Bull Family Fund	
Ted & Melva Max Family Fund	
Rosamond G. Childs Fund	
Purchase of 1 and 3 Rutger Park properties	
New Hartford Public Library	\$20,000.00
Brigham Family Fund	
Ellen Knower Clarke Fund	
Replacing and purchasing additional computer equipment	
Remsen - Steuben Historical Society	\$10,000.00
General Fund	
Funding for start up of Remsen Development Corporation's Ty Gwaith Creffryn Remsen Welsh development	
UNHS NeighborWorks HomeOwnership Center	\$35,000.00
Rosamond G. Childs Fund	
Capital building project	
Utica Public Library	\$100,000.00
Frank W. Baker Fund	
Brigham Family Fund	
Rosamond G. Childs Fund	
Window restoration	

INVESTING IN THE ARTS

Arts Guild of Old Forge, Inc.	\$100,000.00
Franklin J. Ely First Lake Foundation Fund	
Wesley & Marion Small Fund	
To support professional consultants specializing in capital projects and organization expansion	

NURTURING YOUTH & FAMILIES

Boy Scouts of America-Revolutionary Trails Council, Inc.	\$15,000.00
Brigham Family Fund	
Wesley & Marion Small Fund	
Project COPE—relocation of challenge course from Camp Pioneer to boy scout camp	
Root Farm Foundation	\$12,500.00
Albert and Kathryn Payne Memorial Fund	
Building expansion due to increased programming demands	

STRENGTHENING HUMAN SERVICES

American Red Cross - Utica Chapter	\$5,000.00
Douglas J. Grant Fund	
Facility drainage project—gutter and outside drainage improvements	
Central Association for the Blind and Visually Impaired ..	\$50,000.00
Frank W. Baker Fund	
Harrison S. Sweet Memorial Fund	
Equipment for green cleaning production line	
Herkimer Area Resource Center	\$16,218.00
Anonymous Fund	
Wesley & Marion Small Fund	
Equipment for computer literacy training center	
Insight House Chemical Dependency Services, Inc.	\$55,790.00
Rosamond G. Childs Fund	
Energy impact capital project	
JCTOD Outreach, Inc.	\$23,320.00
Albert and Kathryn Payne Memorial Fund	
Purchase of a new van	
Mohawk Valley Community Action Agency, Inc.	\$25,000.00
Rosamond G. Childs Fund	
Martin - Gifford Memorial Fund	
Purchase of building for Griffiss Child Development Center	
YWCA of the Mohawk Valley	\$65,100.00
David E. and Jane S. Bryant Fund	
John E. and Harriet T. McGrath Fund	
Alexander Pirnie Fund	
Renovation and office rental of second floor	

SUPPORTING OLDER ADULTS

Charles T. Sitrin Health Care Center Inc.	\$75,000.00
Faxton Street Home Fund	
Challenge grant to assist with fundraising for the Sitrin expansion project	
Presbyterian Home for CNY, Inc.	\$75,000.00
Faxton Street Home Fund	
Funding to build home-like skilled care residence for people with Parkinson's disease	
Rome Home	\$3,658.00
Faxton Street Home Fund	
Plumbing repairs	

Donor-Advised Grants

Donor-advised grants are derived from funds that allow donors to participate in the grantmaking process by recommending which charities will benefit.

A. Richard Cohen Family Fund	\$48,500.00
Arts Guild of Old Forge, Inc.	
Arts Guild of Old Forge, Inc. (for Garden Club)	
CAP-21 (2)	
Old Forge Library	
St. Elizabeth Medical Center	
Town of Webb Historical Association	
Albert S. Mazloom Family Fund	\$14,000.00
Central Association for the Blind and Visually Impaired	
Charles T. Sitrin Health Care Center Inc.	
Citizens United for Research in Epilepsy	
Girl Scouts-Foothills Council, Inc.	
Hospice and Palliative Care, Inc.	
Utica College	
Alfred & Elizabeth Duffy Fund	\$2,000.00
Sculpture Space	
Sunset Neighborhood	
Anne M. & Carl A. Panasci Family Fund	\$5,100.00
Jervis Public Library	
Rome Art & Community Center	
Rome Catholic School	
Rome Colts Pop Warner Football Organization	
Rome Girls Softball	
St. John's Evangelical Lutheran Church	
YMCA of Greater Rochester	
YMCA of the Greater Tri-Valley	
Blue Mountain Lake Fund	\$7,000.00
Paul Smith's College	
Bull Family Fund	\$5,000.00
St. Elizabeth Medical Center Foundation	
Charles A. Gaetano Family Fund	\$1,500.00
Sunset Neighborhood	
Utica College	
Charles Henry Ide & Georgiana Roberts Ide Fund	\$2,300.00
The Arc, Oneida-Lewis Chapter NYSARC	
Munson-Williams-Proctor Arts Institute	
Rescue Mission of Utica	
F.X. Matt II Memorial Fund	\$2,050.00
Family Nurturing Center	
Transportation Alternatives	
Utica City School District	
Giotto Family Fund	\$35,710.00
New Hartford Presbyterian Church (3)	
St. Elizabeth Medical Center Foundation	
United Way of the Valley and Greater Utica Area, Inc.	
Utica College	
J.K. & Hedy Anne Hage Family Fund	\$31,000.00
Albany Law School	
Hamilton College	
The Women's Fund	
Jacque & Terry Tolles Fund	\$1,250.00
Clinton ABC Program, Inc.	
Kristen Ann Carr Fund	
Keller Family Fund	\$3,900.00
Boonville Black River Canal Museum	
George School (2)	
Lighthawk	
North Country Public Radio	
Planned Parenthood Mohawk Hudson, Inc	
Macartney-Wallace Family Fund	\$1,000.00
Stevens-Swan Humane Society	
Richard & Kimberly Hanna Fund	\$28,850.00
Bassett Hospital — Friends of Bassett	
Cato Institute	
Citizens United for Research in Epilepsy	
Compassion Coalition	
Family Nurturing Center (2)	
For the Good, Inc.	
Girl Scouts-Foothills Council, Inc.	
New York State Historical Association	
Otsego 2000	
Otsego County Conservation Association	
Planned Parenthood Mohawk Hudson, Inc	
Resource Center for Independent Living	
Utica Public Library	
Ronald & Sheila Cuccaro Family Fund	\$11,000.00
Abraham House	
American Heart Association, Utica Chapter	
The Arc, Oneida-Lewis Chapter NYSARC	
Boys & Girls Club of Utica, Inc.	
Greater Utica Community Food Resource	
Hope House	
Peacemaker Program, Inc.	
Utica College	
Utica Public Library	
Root Family Fund	\$10,000.00
Valley View Vaulters	
Steven D. Smallen Fund	\$1,500.00
Hamilton College	
Kirkland Town Library	
St. Joseph's Hospital	
Talley Fund	\$10,600.00
Capitol Theatre	
Humane Society of Rome	
Rome Art & Community Center	
Rome Community Theater	
Thomas M. Lindsey Memorial Fund	\$3,000.00
Boys & Girls Club of Utica, Inc.	
Kids Oneida	
Toys for Tots	
Wadih & Juliette Zogby Family Fund	\$300.00
St. Louis Gonzaga Church	
Wolfe-Smith Fund	\$600.00
House of the Good Shepherd	
YMCA of Greater Rochester	

Scholarship

Scholarships to students from Herkimer and Oneida counties are made possible by funds designated to support educational achievement, with the donor often determining the criteria for the award.

SCHOLARSHIPS

TOTAL: \$14,213.00 19 Scholarships awarded

Foundation Becomes Leave a Legacy® Sponsor

The Community Foundation of Herkimer & Oneida Counties, Inc. has become a sponsor of the *Leave a Legacy®* program of Central New York.

A collaborative effort involving non-profit organizations, estate and financial planning professionals, and the media, *Leave a Legacy®* promotes the message that people from all walks of life, encompassing a wide range of income levels and ages, have the ability to "make a difference in lives that follow" by leaving behind a charitable legacy.

The cooperative marketing effort is associated with the campaign conducted by the National Committee on Planned Giving aimed at inspiring people to make charitable bequests. It closely reflects the key Community Foundation theme of encouraging prospective donors to create future funds to support a favorite charity or cause.

Further information is available by contacting The Foundation at 315-735-8212. For more about how others have made a difference beyond their lifetimes, visit *Leave a Legacy's* Web site, www.leavealegacy.org.



Your Life. Your Legacy. *Your Foundation*

Legacy Society Expands

The Community Foundation's Legacy Society, which honors those who have chosen to shape their legacies through a planned gift from their estates, has grown over the last year to include 60 members.

We are pleased to welcome the newest members into this forward-thinking society:

Linda Allen | Ray Allen | Robert Goodrow | Wanda Goodrow | Alan Leist III

Why do people give to charity through their estates?

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. These may include honoring the family name, providing for heirs, minimizing taxes and supporting the place you call home. Bequests to community foundations are exempt from estate taxes. Trusts also offer many advantages. Retirement accounts and life insurance can be designated to charities with little impact on current income.

When should I include a charitable gift in my estate plan?

Any time you are drafting or changing your will. Your financial or legal advisor can provide guidance related

to your beneficiaries, goals, income needs, taxes and other fiscal considerations. We can provide input on the needs of the community and set up a named fund for the future for any cause or charity that matters to you (at no charge).

When do I become a member of the Legacy Society?

As soon as you notify us of your planned gift of any kind — no details are requested.

Then what?

When the time comes The Foundation will: create your fund and use it only for the purposes you specified; invest the principal and use the income for grants; and handle all the administrative tasks **forever**.

Please contact us to learn more about planned giving.

White Named Director of Marketing and Development

Anne White has been named Director of Marketing and Development for The Community Foundation.

A graduate of Sauquoit Valley Central School, she holds a bachelor's degree in history from Nazareth College and brings over a decade of experience in the nonprofit sector to her new position.

Among the organizations she has served are Glimmerglass Opera, the Sitrin Health Care Center and Stevens-Swan Humane Society, handling functions ranging from newsletter and brochure production, to fund raising and media relations. She has also been an elections inspector for Oneida County.

In 2005 White was honored with a "40-Under-40" award from the *Central New York Business Journal*.

Away from the job she enjoys cooking, reading, horseback riding and fostering shelter animals.



Anne White

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