Over the past 26 years, I have had the pleasure of advising The Community Foundation of Herkimer & Oneida Counties on its asset allocation and investments, while also providing insight on financial performance and research-based decision making. Since nearly 90% of Colonial Consulting’s clients are nonprofit organizations, we know this field very well.

In 1993, The Community Foundation became one of the first community foundation clients we worked with. As a very interested third party, I’ve had the opportunity to watch the organization grow and change with the times. I’m blown away by The Community Foundation’s team of professionals and its constant drive to be stronger and do better.

Growth of The Community Foundation’s assets is driven largely by prudent investment decisions guided by a comprehensive and long-term strategy that will allow the organization to grow and succeed in perpetuity. The Community Foundation’s investment performance has been very strong, and I believe the factors that have led to past success will continue to contribute to future success.

I take pride in the fact that the work we do to help guide The Community Foundation’s investments strengthens the two counties it serves, in fulfillment of its mission. Should you have any questions, please feel free to reach out to me.

I look forward to many more years of partnership with The Community Foundation, growing its investments and impact for a better community.

Michael A. Miller, CFA
Managing Director
Colonial Consulting, LLC
For the Kowalskys—the family behind Empire Recycling Corporation—the legacy left by past generations continues to guide the business’s core values. As the largest recycling center in Upstate New York, the company is committed to creating a healthier, more industrious environment for all. Founded and headquartered in Utica, Empire Recycling also has divisions in Albany, Endicott, Liverpool, Syracuse and Waterloo—handling an estimated 30 million pounds of recyclables each month.

Going back to the very beginning, the family emigrated to Utica from Lithuania in 1885, led by Mordechai (Max) Kowalsky, who began collecting scrap metal to make a living and provide for his family. Times were tough, but the family’s strong spirit and deep appreciation for tradition became an integral component of the creation of the family business. In 1916, Empire Waste and Metal—later renamed Empire Recycling—was established by Max’s son Robert, and grandsons Morton and Louis. Now, decades later, the corporation remains a family tradition with the fourth generation, brothers Steven and Edward Kowalsky, leading the company into a new era.

Libby Sherman Kowalsky, Steven and Edward’s great-grandmother, was recently honored in the Oneida County History Center’s Hall of Fame. Libby was instrumental in the creation of the Sitrin Health Care Center and served on several boards and clubs dedicated to caring for the sick and downtrodden. In 1958, she received a letter of commendation from President Eisenhower for her lifetime of community service.

To preserve the legacy of giving that the brothers believe is a part of their family, and to continue their acts of goodwill for generations to come, Steven and Edward established a donor-advised fund at The Community Foundation in 2018. The Empire Recycling Fund has awarded more than $84,000 to local organizations focusing on everything from the arts and sports, to human services and educational purposes. Among the fund’s many beneficiaries to date are Care Net Pregnancy Center of Central New York, Temple Beth El, and the Rescue Mission of Utica.

Steven, who is particularly interested in his family’s rich history, has adorned the Utica offices with numerous old family photos. He can proudly recall countless stories of philanthropy within his family. Libby Sherman Kowalsky, Steven and Edward’s great-grandmother, was recently honored in the Oneida County History Center’s Hall of Fame. Libby was instrumental in the creation of the Sitrin Health Care Center and served on several boards and clubs dedicated to caring for the sick and downtrodden. In 1958, she received a letter of commendation from President Eisenhower for her lifetime of community service.

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In the days following their father’s funeral, Steven recalled, many people gratefully recounted how their father had helped them—some in ways the brothers had never even known about.

“‘I can’t even begin to count the people that came up to me at that time and expressed their gratitude for what our father did for them. Never telling anybody how he helped others,’ said Steven. This sentiment—giving without expectation—is reflected in the brothers’ values.

“There’s a strange dichotomy between giving and advertising that you’re giving,” added Edward. “For me, our company, and Steven, it seems that there’s more to be gained by giving and not putting it up on big signs. To me, it takes a little bit away from it.”

“We just saw this fund as a vehicle to help other people,” said Edward. “And hopefully extend it past our time and grow it—something that we can leave and grow and add to.”

Steven encourages others to do good for their community without agenda. “Give from your heart. We all must check our motives and ask, ‘Why are we doing what we’re doing?’ But giving from the heart, you just can’t go wrong.”

With a family heritage as rich as their company history, the Kowalskys embody the essence of philanthropy—investing in their community and its residents without expectation of recognition. As a thriving business that has given back to the region in more ways than one, Empire Recycling looks forward to its next century with optimism—ready to support goodwill and compassion for generations to come.
A place to call home, a bed to rest in, a nourishing meal, a room to study and learn, having someone to talk to—Rescue Mission of Utica provides all that and more to individuals overcoming homelessness, abuse, and addiction. Giving hope to the community is what drives the organization, and more than 1,400 volunteers and staff help make this hope come alive daily.

The Rescue Mission’s wide array of free programs includes an addiction stabilization center, emergency shelter for men, enriched living center, aftercare program, and low-income housing in the newly built West Street Apartments. One service that most people associate with the Mission is the free hot meal served three times a day, 365 days a year, to all who walk through the doors. The organization’s commitment to helping the community is a full circle approach—one that has inspired some past program participants to become employees, helping others to see the organization’s mission fulfilled.

The emergency shelter is a 59-bed facility that offers a safe haven for men who are living on the street with nowhere to go. In 2018, the shelter provided more than 17,000 nights of care to homeless men, with a 70% success rate of getting them into permanent or transitional housing.

“One of the things that really struck me when I first started working here is that the first question they ask men who are entering the shelter is, ‘Do you have dry socks?’” said Wendy Goetz, executive director. “When I wake up in the morning, I’m not worrying about if I have dry socks or if I have food in the pantry—I just do. So, it’s a whole new perspective.”

A program focused on assisting men and women diagnosed with mental illness takes place at the Mission’s enriched living center (ELC). With staff available 24 hours a day, the mental health residence provides patients with food, personal hygiene items, counseling, medication management, transportation, and more.

When it comes to keeping our community vibrant, healthy, safe, and stable—the silent “behind the scenes” work often makes the greatest impact. The Rescue Mission of Utica is one of the organizations where this work takes place. With its 130th anniversary just around the corner, the faith-based service provider has changed countless lives over the decades.
“There’s a lot of success stories here,” said Hank Visalli, director of services at the ELC. “When people ask me what I do for a living, I say we help people grow, learn basic skills about life, and become more independent in the community where they live.”

“Every day it’s something different and that’s why I love working here,” said Linda Nobles, ELC resident care coordinator. “There’s 52 residents here, so even if it’s just talking with someone, helping them make a phone call, writing a note—it just makes their day. You may not think it’s big, but for them, it’s a miracle.”

With many people successfully completing programs that the organization offers, combined with the local need for affordable housing options, Rescue Mission of Utica took on one of the largest projects in its history, the West Street Apartments. Located at 1013 West Street in Utica, the apartment complex is the only housing option that assists families on site. The location is close to other Rescue Mission buildings, as well as potential employers, daycare facilities, and bus routes. West Street Apartments includes a food pantry, clothing closet, learning center, and a financial management office, giving residents direct access to everything they need to live enriched and comfortable lives.

“We get people on their feet, get them going, and hopefully prepare them to continue that journey to better themselves,” said Jaime Crowe, building manager. “This isn’t really a normal apartment complex. We do a lot with our residents—from résumé-writing to making sure they have a place to come home to should they have an issue that requires them to return to treatment. We try to work with them the best we can.”

The programs and services provided by the Rescue Mission have been enhanced throughout the years with the help of grants from The Community Foundation and its generous donors. Since 1991, the organization has been awarded more than 90 grants totaling over $565,000. Most recently, Rescue Mission was selected as the winner of the $5,000 Board Recognition Award as part of The Community Foundation’s 2019 Community Choice Awards program. The grant will fund the purchase and installation of sinks with faucets, enhancing its ability to salvage, process and distribute fresh, clean produce to thousands of families each year.

Another noteworthy cause supported on numerous occasions is the Rescue Mission’s Skills for Success program. This hands-on, job training program allows individuals to learn the construction trade, preparing them for successful and meaningful employment in the industry after graduation. In 2018 alone, more than 70% of program graduates found employment or went on to pursue higher education opportunities.

“We probably wouldn’t be here if it wasn’t for The Community Foundation and other community donors,” said Goetz. “We get funding from other sources, but it’s the donations and the volunteer hours that keep us going. If it wasn’t for that, we wouldn’t be nearly what we are today.”

More great things are ahead as the organization is working to stabilize and enhance its programs, ensuring that it will be viable for the next 130 years. Plans to expand shelter beds—which were at capacity for most of last year—and offer more services for women are on the future projects list.

The Rescue Mission of Utica is living proof that doing good has no end. With the help of caring staff and the boundless will to serve others, Rescue Mission will continue to reach out and change lives.
BIANCA MICHELLE DEVINS MEMORIAL SCHOLARSHIP FUND
A scholarship fund created by the Devins and Williams families in memory of Bianca Devins. The fund will support students pursuing a degree in psychology to continue Bianca’s dream of helping adolescents with mental illness.

BRAVE STREET KIDS CHARITABLE FUND
An agency fund to benefit Brave Street Kids, a charity created out of an idea by a 7-year-old boy named Jackson, who was born with Total Colonic Hirschsprung Disease. The fund will assist with publishing a book to help other children like him find strength, bravery and positivity during hospital admissions.

BRUCE AND FRANCES BULL FAMILY FUND
A donor-advised fund established by Bruce A. and Frances M. Bull for general charitable purposes.

CLARK FAMILY FUND
A donor-advised fund established by Richard K. and Diane K. Clark for general charitable purposes.

EMPOWERED PATHWAYS CHARITABLE FUND
An agency fund to benefit Empowered Pathways, a nonprofit organization with a focus on providing employment, mediation and advocacy services to women, youth and families in the area.
KIRKLAND TRAILS FUND
A fiscal sponsorship of Kirkland Trails, a newly created not-for-profit organization that is developing a network of multiuse trails, paths and bike lanes owned by the Town of Kirkland.

LARRY AND CORKY BULL FAMILY FUND
A donor-advised fund established by Lauren E. and Cora L. Bull for general charitable purposes.

MARTIN AND SUSAN BULL FAMILY FUND
A donor-advised fund established by Susan P. Bull for general charitable purposes.

REAL MEN GET TESTED FUND
A field-of-interest fund established by Timothy Reed for the charitable purpose of creating awareness, primarily among men in Herkimer and Oneida counties, of the importance of preventive testing for cancer.

STANLEY J. WIATER FUND FOR RESPONSIBLE HUNTING AND FORESTRY STEWARDSHIP
A field-of-interest fund established by Julie and Jeff Rubenstein for the charitable purpose of supporting organizations in Herkimer and Oneida counties that promote safe and responsible hunting practices or encourage sustainable forest stewardship through land management, productive timber harvesting, and conservation of the natural environment.

STEVENS-SWAN HUMANE SOCIETY FUND
An agency fund established by Stevens-Swan Humane Society to administer and invest its charitable assets.
INVEST IN YOUR Community

MAKE A GIFT THAT WILL FIT YOUR PHILANTHROPIC GOALS AND BENEFIT THE COMMUNITY FOR YEARS TO COME.

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NEW TRANSFER INSTRUCTIONS FOR GIFTS OF STOCK

Please provide your bank or broker with the following instructions for transfer of stock to our account at Robert W. Baird & Co. Inc.:

DTC #: 0547
Account #: 1854-6383
Account Name: The Community Foundation

Notify Nick Grimmer, director of giving strategies, 315.731.3737, ngrimmer@foundationhoc.org, that a gift is being transferred. Provide the donor name, number of shares, and the name of the stock or the stock code, as well as the designation.

YEAR-END GIVING REMINDERS

Per IRS guidelines, the following deadlines must be adhered to in order for gifts to count for 2019 tax deductibility.

ONLINE GIFTS
Online credit card transactions must be completed by 11:59 p.m. on Tuesday, December 31, 2019.

PHONED-IN OR IN-PERSON GIFTS
Phoned-in or in-person gifts must be received by 4 p.m. on Tuesday, December 31, 2019.

MAILED GIFTS
Gifts mailed to The Community Foundation must be postmarked by Tuesday, December 31, 2019.

INTERESTED IN LEARNING MORE?
CONTACT OUR TEAM>

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A copy of our most recently filed financial report is available from the Charities Registry on the New York State Attorney General’s website (www.charitiesnys.com) or, upon request, by contacting the New York State Attorney General, Charities Bureau, 28 Liberty Street, New York, NY 10005, or The Community Foundation of Herkimer & Oneida Counties, 2608 Genesee Street, Utica, NY 13502. You also may obtain information on charitable organizations from the New York State Office of the Attorney General at www.charitiesnys.com or 212.416.8401.