Inside

MOHAWK VALLEY GIVES

ORGANIZATION FEATURE:
MOHAWK VALLEY INSTITUTE FOR LEARNING IN RETIREMENT

FUND SPOTLIGHT:
BAMBERGER FAMILY FUND
This year, the Community Foundation marks its 70th anniversary—an important milestone. In looking back at how far we’ve come, especially in the last decade, I must give a huge THANK YOU to each and every one of you: for helping our community to thrive, for being not only a partner but a friend, and most important of all, for believing in and supporting our mission and vision. Whether you’ve been a fundholder with us for decades or just a few months, you play such an important role in the work we do and the impact we have on all those who live in our two-county community.

As if our notable anniversary weren’t exciting enough, 2022 will also be our first year ever hosting a 24-hour community giving day, “Mohawk Valley Gives.” Please take a look at the next page for details, including ways you or your fund can get involved in this community-wide effort. Even as we look ahead, we can’t forget to celebrate some of 2021’s great outcomes. Thanks to your generosity and the support of all our donors, we awarded more than $10 million dollars to nonprofit partners last year, driven largely by investments made by our donor-advised fundholders. Add to that amazing statistic the record sum of donations received, and the number of new funds created, and it’s clear those who support our community continue to step up—even in difficult circumstances that have challenged us all.

The ways in which we invest in this community are always evolving, and this year we will continue to enhance the connections between community and nonprofit organization needs and donor interests. We’ll share funding proposals that may be of interest and create and maintain a nonprofit “needs and wish list” so donors, fundholders, and the community can see how best to support our partners. Building this greater connection will be an evolving effort, and we look forward to working with you in collaboration with nonprofit partners old and new.

We have a year full of community impact planned, and I hope you share in our excitement as we make progress. Many great things have happened in our 70-year history, and together, we will achieve even greater things to come.

Alicia Dicks
President/CEO
The Community Foundation of Herkimer and Oneida Counties
In celebration of our 70th anniversary, the Community Foundation will host its first ever 24-hour community giving day, “Mohawk Valley Gives,” on September 20, 2022. This is the start of a multiyear effort, using our community giving day to bring nonprofit need and donor support together through our 75th anniversary and beyond.

“Holding a giving day is a way to bring the entire community together to support its nonprofit organizations,” said Nick Grimmer, director of giving strategies. “It’s a way to maximize awareness, engagement, and donations, and we’re looking forward to making it an annual way we can all support the Mohawk Valley’s nonprofit community.”

Through the Mohawk Valley Gives online platform each participating nonprofit will be able to create a unique online profile, so that donors can support their favorites—and also learn about other organizations doing great work in our community. Our team will assist nonprofit organizations that participate so that they can leverage the power of their networks and supporters on September 20.

In addition to working with nonprofits, we’ll engage with businesses, community residents and, of course, you—our fundholders—to make sure we harness the community’s collective energy for the greatest possible impact.

Here are ways you can get involved and participate:

- Challenge others in the community to donate by putting up a match for gifts made to your favorite local nonprofit
- Sponsor prizes that reward nonprofits for their active participation during the day
- Launch a fundraiser at your workplace allowing co-workers to team up in support of causes that are important to them
- Simply donate to your favorite community causes and organizations on September 20

If any of the above options are of interest to you or if you have questions about how to participate in Mohawk Valley Gives, please reach out to Nick Grimmer, ngrimmer@foundationhoc.org, 315-525-6584, to start the conversation. Stay tuned for more details to come about this exciting event!
For the past 25 years, the Mohawk Valley Institute for Learning in Retirement (MVILR) has provided opportunities for local seniors to “learn, live, grow, move, think, socialize and create” as they transition from years of hard work to productive retirement.

MVILR recently partnered with Mohawk Valley Community College’s Center for Corporate and Community Education to continue providing local retirees with rich learning opportunities. After calling SUNY Polytechnic Institute home for the last two decades, MVILR is now located on MVCC’s Rome campus. And its members are excited about the new larger space, dedicated classrooms for their courses, state-of-the-art special event spaces, and accessible parking.

“I have been an active member of MVILR for over 20 years and have enjoyed taking so many interesting academic and special interest classes that I was never able to take while pursuing a nursing degree,” says member Cynthia DeTraglia. “I have made many new friends over the years who shared my excitement to learn and stay mentally and physically active, and I am very excited that MVILR has newly partnered with MVCC.”

“I’m totally looking forward to MVILR’s new affiliation with MVCC Rome,” says member Nancy Ketz. “Being an educator for more than 35 years, I’ve always been a fervent advocate for lifelong learning. Whether we appreciate the diverse offerings to promote brain health as we age, or if it’s simply the joy of learning and socializing, this program gets an A-plus.”

Each year, the organization offers a wide variety of classes on subjects such as art, music, literature, computer science, finance, law, social studies, health and wellness. Beyond that, MVILR’s special interest groups enjoy other social and recreational opportunities. According to Program Coordinator Sofia Piccione, one of the most popular activities is Mahjong, a tile-based game developed in 19th-century China.

Piccione adds that when mapping out each year’s programs, she tries to keep classes interesting and diversify the range of offerings.

“It’s so important for us to hear from our members,” she says. “We survey our membership and ask for their feedback on things they like, things they want to see more of, and we’re definitely getting more interest in the computer science realm.”

MVILR also offers one-time special events based on the time of year. This year, the organization invited members to the Utica Curling Club to gear up for the Winter Olympics.

“This one-hour lecture covering the sport of curling was paired with a tour of the Utica Curling Club, which provided a chance to see the space, equipment, and ask questions about curling so that members were prepared to be informed spectators of the Winter 2022 Olympics,” says Piccione.

Not only does MVILR promote learning, mental, and physical health, it also provides seniors a way to socialize, make new friends, and helps guide those adjusting to retirement. Many members have worked hard and been active all their lives, so MVILR’s offerings make retirement a pleasant and productive “next phase” of life. And MVILR helps members explore activities they never had the chance to experience while working.
As it matures as an organization—and in a new and expanded location—MVILR is looking to build relationships with other community organizations. Since taking over as program coordinator, Piccione sees such partnerships as very beneficial to its members.

“We’re going to partner with Cornell Cooperative Extension in the spring, and they are going to host a class for us at the botanical gardens in Westmoreland. Our members can learn about gardening and then have some hands-on practice.”

Like many nonprofit organizations in the Mohawk Valley, MVILR has been challenged by the global pandemic and had to pivot programming to a virtual setting, which was a learning experience for both the organization and its members—an experience that has opened many new doors for the future of its programs.

“One of my favorite things has been introducing this organization to all the efficiencies that technology brings and how we can continue to use it to provide a varying degree of courses via Zoom,” says Piccione. “We’re also exploring a hybrid option and other third-party learning platforms so that members can have some added perks to their annual membership and be able to explore some online material from different organizations that we may be able to partner with.”

The Community Foundation is one of MVILR’s trusted partners. Through support from multiple donor-advised funds, the organization was able to successfully transition from SUNY Poly to MVCC. The funding helped with moving costs and getting everything back up and running again in a new location. Piccione and the team at MVILR are looking forward to partnering with the Community Foundation while enriching the education and lives of local retirees.

Whether you or a senior you know is looking to improve health and wellness with pickleball, yoga, or meditation, or take part in a roundtable discussion of current events, MVILR can be your bridge to enhanced learning and living.
That’s how those in the community who know them describe Rabbi Henry Bamberger and his wife, Sheila, whose professional and philanthropic impact has been profound over the last four decades, ever since Rabbi Bamberger began leading Temple Emanu-El. One important way that they have focused their impact in recent years has been through partnership with the Community Foundation.

Looking for a way to give back to the local community that they’ve called home since 1982, they knew that creating the Bamberger Family Fund at the Community Foundation was the perfect way to do it.

“We’ve been generous for years individually, so we thought that establishing this family fund would be a perfect option to extend our giving to those organizations we support and have relationships with,” said Sheila. “Working with the Community Foundation has made our lives very simple.”

“We were very familiar with the organization and have used their services in the past, so it was a natural transition,” Rabbi Bamberger said.

Established in 2020, the fund isn’t the only way that the Bambergers continue to inspire. Both stay very busy and do a great deal of volunteer work throughout the area.

Sheila serves on the Charles T. Strin Health Care Center board and for years was a member of the Players of Utica board; she continues to serve as a resource for the organization. She’s also been active in the University of Albany alumni association since 1957.

Rabbi Bamberger is on the ethics committees for area hospitals as well as the Hamilton College Institutional Review Board. Over the years, he’s also served on volunteer boards for the CNY Food Bank, Munson-Williams-Proctor Arts Institute, Planned Parenthood Mohawk-Hudson, the Samaritan Center; and Mohawk Valley Institute for Learning in Retirement (MVILR). But his favorite volunteer activity is his role as a docent at the Utica Zoo.

Rabbi Bamberger retired from Temple Emanu-El in 1999 and was elected Rabbi Emeritus. Retirement allowed both Bambergers to fully involve themselves in MVILR’s lifelong learning mission; members for more than 20 years, they have both taught a variety of MVILR courses. Together, the couple led classes in Shakespeare, the Bible, and football. Sheila drew on her career as a math teacher to offer MVILR members courses in mathematics, and Rabbi Bamberger solo taught religion ethics—and beginning birding.

“The very first course we taught together was in the old lecture hall at what is now SUNY Poly. It was a course about Abraham, Isaac, and Jacob, and to our surprise there were over 100 people,” Rabbi Bamberger said. “We’ve stayed in contact and become friends with many of the students that took our classes, and I am still teaching there currently.”

Now, the couple is using their donor-advised fund to extend support to the organizations they know and love. Together, they make decisions on what their fund will support and so far have awarded grants to University of Albany Foundation, MVILR, Jewish Community Federation of the Mohawk Valley, WCNY, and others.

“It’s important for us to invest locally because we’re able to and because this community has been very good to us,” said Sheila. “When we retired over 20 years ago, people would ask if we were going to move or where we were going to go, and they were pleasantly surprised when I would say that we were very happy to stay right here. We have friends, we have activities. Everything tells us to stay here and have a fun life.”

Rabbi Bamberger says Utica has felt like home almost from the beginning.

“We had only been here a few weeks, and I remember I was trying to find my way to someplace using the directions I had been told—which didn’t work. I found that I had no idea where I was, so I knew I was lost. But I didn’t feel lost.”

“That’s when I knew that this was home.”
Our NEWEST funds

ANITA'S STEVENS SWAN HUMANE SOCIETY COMMUNITY FUND
A designated fund to administer community contributions for Anita's Stevens Swan Humane Society.

B SHARP MUSICAL CLUB FUND
An agency fund established by B Sharp Musical Club, an organization that advances the performing arts among its members and the community at large through concerts, outreach programs and youth mentorships and scholarships.

BROADWAY UTICA - STUDENTS ON BROADWAY FUND
An agency fund established by Broadway Theatre League of Utica to support its Students on Broadway program, providing K-12 children the opportunity to engage with theatre and the arts.

BROADWAY UTICA - YOUTH AMBASSADOR PROGRAM FUND
An agency fund established by Broadway Theatre League of Utica to support its Youth Ambassador Program, engaging area high school students in its seasonal productions and inspiring them to thrive in the world of theatre, the arts, the community, and in life.

COGAR FOUNDATION FUND
A donor-advised fund established by the Cogar Foundation for general charitable purposes.

MARTIN J. MEEHAN MEMORIAL FUND
A donor-advised fund established by friends and family in memory of Martin “Marty” Meehan to support the educational endeavors of graduating athletes at Oswego High School.

OPERATION SUNSHINE FUND
A field-of-interest fund created by Operation Sunshine to provide camperships to local children.

SAWER FAMILY FUND
A donor-advised fund established by Steve and Nancy Sayer for general charitable purposes.

THE FAHY FAMILY CHARITABLE REMAINDER UNITRUST
A charitable remainder unitrust established by the Fahy Family.
INVEST IN YOUR Community

HOW TO GIVE

MAKE A GIFT
- Cash
- Real Estate
- Stocks & Securities

CREATE A FUND
- Donor-Advised
- Scholarship
- Field-of-Interest

PLAN YOUR LEGACY
- Bequests
- Future Fund
- Life Insurance

GENERATE AN INCOME
- Retirement Plans
- Charitable Gift Annuity
- Charitable Remainder Trust

WAYS TO GIVE

ONLINE
foundationhoc.org

MAIL
2608 Genesee Street
Utica, NY 13502

PHONE
315.735.8212

TRANFER 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.

BEST WISHES, Lindsey

Lindsey Costello, our donor relations manager, is leaving the Community Foundation after serving as a faithful point of contact, facilitator, and advocate for our donor-advised fundholders for several years. Please join us in wishing her well—and in our message of gratitude for all that she’s done to make our two-county community better and more vibrant.

INTERESTED IN LEARNING MORE?
CONTACT >

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DIRECTOR OF GIVING STRATEGIES
ngrimmer@foundationhoc.org | 315.525.6584

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.