



THE FOUNDATION REPORT

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Best-Selling
Author to Speak
On Change

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Updated Foundation Look



The Foundation's
New Building



INVESTING IN OUR YOUNG PROFESSIONALS

The Foundation recently partnered with The Greater Utica Chamber of Commerce to educate local businesses in creating impactful partnerships with our community's millennials.



\$1 MILLION GIFT TO HAVE BIG COMMUNITY IMPACT

The Foundation is thrilled to acknowledge the latest addition to our strong group of partners in giving. In February, Utica National Group Foundation made a \$1 million gift to The Foundation. The Utica National Group — a philanthropic arm of the Utica National Insurance Group — will invest at least \$100,000 into the community each year for 10 years in the form of grants. Those grants will be given to organizations focused on promoting healthy families by addressing root cause issues.

We look forward to the impact we will have with this established and respected partner.

The \$5,350 investment made by The Foundation to help the Chamber bring leadership and millennial expert Joan Snyder Kuhl to Utica was

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UPCOMING EVENTS

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MAY

WHAT:

Together we will explore the faces of the past, present and future Foundation. We'll be making several important and exciting announcements.

WHEN:

5 to 7:30 p.m.
Program starts at 5:30 p.m.
Thursday, May 29.

WHERE:

RCIL/Dorothy Smith Center,
1607 Genesee St., Utica.

RSVP:

Invitations have been mailed. Space is limited. Please email lmorris@foundationhoc.org or call Laura Morris at 735-8212.

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OCT.

WHAT:

The Community Foundation's Corporate Partners-sponsored Speaker Series, featuring Dan Heath. (See story on page 3.)

WHEN:

7 p.m. Thursday, Oct. 16.

WHERE:

The SUNYIT Wildcat Field House.

RSVP:

Details to follow.

PARTNERSHIP = IMPACT



A MESSAGE FROM OUR PRESIDENT & CEO

Peggy O'Shea

Over the years, you've partnered with The Community Foundation to invest millions of dollars into Oneida and Herkimer counties.

Within the past few years, you've seen how we've created strong partnerships with the goal of making the most impact in our community.

You may not all have been there more than 60 years ago when our founding fathers made the first grant, but you have at some point along the way seen or been a part of our impact — whether it's been providing the resources to build our local food pantry or supporting partner agencies in a community goal of eradicating illiteracy.

SUPPORT PRIORITY AREAS

We understand our continued success takes true partnerships and long-term commitments. As we continue to grow together, we ask you to support our newest initiatives derived from a 2009 indicators study that showed the areas most in need in our community. That research showed our community needed resources most in four areas: economic development, education, arts and culture and health. We've spent the last few years developing goals around these priority areas and even have begun investing in and building programs to support those goals.

Now, you can invest in those areas through four funds created specifically for big impact community investing.

“As we continue to grow together, we ask you to support our newest initiatives...”

IMPACT YOUR COMMUNITY

By investing in those priority areas, you can continue to impact our community by supporting community-changing initiatives, including preparing students for school, reducing lead levels and increasing the number of residents with bachelor's degrees.

In partnership with you, we can make the difference that will mean the most for our community. Consider how a gift to The Community Foundation will allow more residents to receive bachelor's degrees, which is linked to decreasing poverty and increasing jobs. Consider how your gift to our health initiative could reduce lead levels in Oneida County, where levels are the highest in the state.

Imagine the influence you can have on your community by aligning your passions with our community's needs.

Call our Director of Development Kristi Brennan today at (315) 735-8212 to see how your partnership with The Foundation can make great impact.



Dan Heath



NEW YORK TIMES BEST-SELLING AUTHOR FEATURED AT THIS YEAR'S SPEAKER SERIES

The Foundation will welcome New York Times best-selling author Dan Heath as its featured speaker for the fourth annual Corporate Partners-sponsored Speaker Series.

Heath will speak on Thursday, Oct. 16, at the SUNYIT Wildcat Field House.

Heath is a Senior Fellow at Duke University's CASE center, which supports entrepreneurs who are fighting for social good. He is the co-author of "Switch: How to Change Things When Change is Hard," which debuted at No. 1 on the New York Times and Wall Street Journal bestseller lists. The Heath brothers previously co-wrote the

critically acclaimed book "Made to Stick," which was named the Best Business Book of the Year. The latest Heath brothers book is "Decisive: How to Make Better Decisions in Life and Work."

Previous speakers urban theorist Richard Florida, education reformist Geoffrey Canada and New Jersey senator Cory Booker roused the community in thought and action. We look forward to seeing how Heath's discussion on making change stick energizes our region.

Visit foundationhoc.org often for updated information and ticket availability.

OUR NEWEST FUNDS

■ **Notre Dame Schools Campaign Fund & Notre Dame Schools Endowment Fund.** In an interest to promote quality education for all children, The Foundation is partnering with the Notre Dame schools to create of two agency funds. The campaign fund will support new construction and renovation of the Notre Dame campus through 2019, and the endowment fund will be used primarily for scholarships.

■ **Damon Fund for Inlet.** Brad Damon and his family have special affection for the community they call home, enjoying the natural beauty and casual lifestyle of the Adirondacks. Through this donor-advised fund, Mr. Damon plans to support general charitable projects, programs and services that will benefit the residents of Inlet, New York and surrounding communities.

■ **UFA Alumni/Mary Kramer Scholarship Fund.** Mary Kramer cared deeply about young people. Through her bequest to the UFA Alumni Association, a fund has been created to award scholarships to deserving graduates of Thomas R. Proctor High School who meet the award criteria. The scholarships will range in size from \$2,500 to \$5,000 depending on financial need.

■ **Chamber Music Society of Utica Fund.** The Chamber Music Society has created an agency fund to build its capacity and generate long-term financial support for its concert series. The Foundation will invest the assets and grow the fund over time, making distributions to the society as needed.

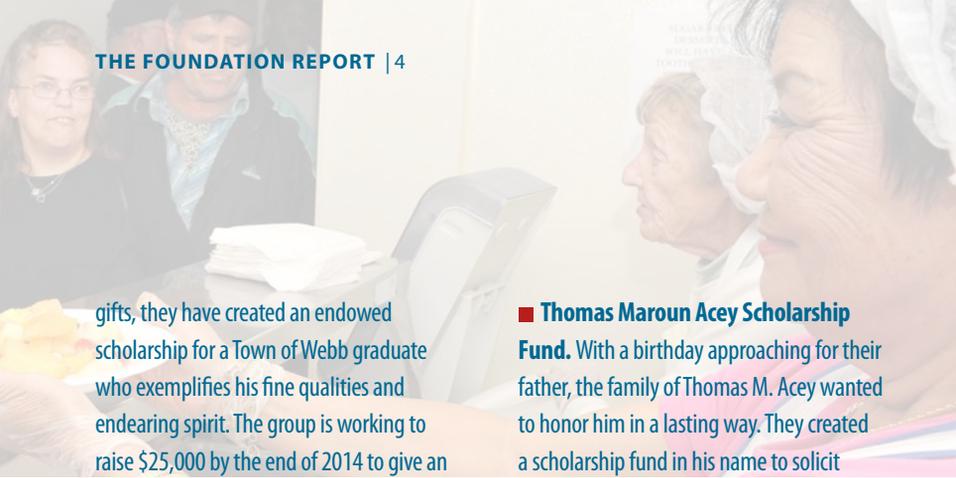
■ **Ronald D. Christy Sr. Memorial Fund.** This popular community man and avid golfer is being remembered by friends and family in a special way. Through memorial

Hocindicators.org is filled with in-depth facts, figures, statistics and findings that shape Herkimer and Oneida counties.

Are you using this site? Here are three ways you can:

1. **Grantwriting:** Looking for information to make your grant relevant? Find the statistics and figures to back up your grant needs.
2. **Sharing:** Knowing your community is one thing. Knowing the facts and figures that shape it is another. Hocindicators.org is the only place to find updated information about Herkimer and Oneida counties.
3. **Supporting:** Every organization has a mission. Use hocindicators.org to uncover the statistics and facts that will back up the importance of your mission.





gifts, they have created an endowed scholarship for a Town of Webb graduate who exemplifies his fine qualities and endearing spirit. The group is working to raise \$25,000 by the end of 2014 to give an award of \$1,000 in his name every year.

■ **The Kenwood Benevolent Society Fund.** A donor-advised fund created by this private foundation through which it will pursue its charitable vision for communities in and around Kenwood, Sherrill and Oneida. The society is interested in The Foundation's proactive work and wishes to collaborate on strategic social investments for greater impact and outcomes.

■ **Fenstemacher Family Fund.*** Keith and Cara Fenstemacher wish to give back to their community in meaningful ways. Through their fund, they will explore hands-on grantmaking and work with The Foundation to improve the lives of others.

■ **Mother Marianne's Westside Soup Kitchen Fund.** Elizabeth Lemieux has created an endowed, designated fund because she does not want anyone, especially a child, to go hungry. The fund will provide support to Mother Marianne's Westside Soup Kitchen in Utica. The kitchen currently serves lunch daily to people in need, including the working poor, the unemployed and struggling families.

■ **Sauquoit Valley Friends & Neighbors Fund.** This designated fund will support the Sauquoit Valley Friends & Neighbors, a nonprofit organization that provides assistance to families in crisis in the Sauquoit Valley. Elizabeth Lemieux recognized the good work of the organization and established a fund (her second fund) to build an endowment that will expand their limited resources.

■ **Thomas Maroun Acey Scholarship Fund.** With a birthday approaching for their father, the family of Thomas M. Acey wanted to honor him in a lasting way. They created a scholarship fund in his name to solicit gifts of tribute from friends, neighbors and co-workers. The scholarship will provide support to students active in community service, who plan to stay in the Mohawk Valley and who parallel Mr. Acey's values, interests and life work.

■ **Robert & Sara Smith Fund.** The officers and directors of a private foundation, bearing the name of this brother and sister, followed the legal process to dissolve the foundation and transfer its assets into an advised fund of The Foundation. The petition was approved. The fund will be used for general charitable purposes per the terms and conditions of the original by-laws and the court order as prescribed.

■ **Investing in Economic Development Fund, Investing in Education Fund, Investing in Health Fund, Investing in Arts & Culture Fund.** These field-of-interest funds were created by The Foundation's Board of Trustees to allow donors to give where their passions lie and also support the core initiatives of our leadership work. Half of the assets in each fund will be invested in current strategic programs and half will be placed into an endowment for that giving area. (See the President's message, page 2).

Contributions to our funds are welcomed. Interested in creating a fund? Contact Elayne Johnson, director of fund administration at ejohnson@foundationhoc.org or 735-8212.

*Acorn Fund

CORPORATE PARTNERS PROGRAM

The Foundation is dedicated to creating strong partnerships with the goal of making social impact in our community. We could not do this without our dedicated corporate partners.

- Adjusters International
- Bank of America
- Bank of Utica
- Birnie Bus Service, Inc.
- Carbone Auto Group
- Charles A. Gaetano Construction Corp.
- Clifford Fuel Co., Inc.
- ConMed Corporation
- Excellus BlueCross
- BlueShield
- Fastrac Markets
- First Source Federal Credit Union
- Ford, English Financial Group, LLC.
- Jay-K Independent Lumber Corp.
- M. Griffith Investment Services, Inc.
- NBT Bank
- The Observer-Dispatch
- Oneida Savings Bank
- Pacemaker Steel & Piping Company, Inc.
- Staffworks, Inc.
- Strategic Financial Services, LLC



UPDATED LOOK SYMBOL OF FOUNDATION'S EVOLVEMENT

Great brands help us define a little of who we are and our place in the community's collective imagination.

Our new brand comes at an ideal transition point for The Foundation. From the purchase of a new building for our community to investing in our four priority areas, The Foundation has grown. The Foundation has evolved higher than we believe our founding fathers could have dreamed more than 60 years ago.

Backed by several months of discovery, our new look, feel and voice is your Community Foundation today and for the future. Invest yourself.

Visit foundationhoc.org to see how our website has evolved with our new brand.



NEW SPACE WILL ALLOW FOR GROWING PARTNERSHIPS

We're moving. By year's end, The Foundation will move into its own building at 2608 Genesee St., Utica. The need to provide opportunities for community convenings demanded a larger space and move. Our new building will help us to continue to grow our investments and partnerships in the community.

This location will allow us to remain centrally located and expand services to the community we couldn't otherwise offer — including meeting and convening space and eventually low-cost office space.

Backed by a more than 60-year history of making significant contributions to the community, this building will provide the foundation for continued impact and be a symbol of the permanent investment and stake The Community Foundation has in Herkimer and Oneida counties.



ABOUT 2608 GENESEE ST.

- Most recently housed Visiting Nursing Association.
- Located in a historic district in Utica.
- Once was the home of First Assembly of God.



INVESTING IN OUR YOUNG PROFESSIONALS *Continued from page 1*

made in order to address a growing trend in that shows the area's working-age population continues to grow older. According to hocindicators.org, Herkimer and Oneida counties lost population among 25- to 44-year-olds between 2000 and 2011.

"It's imperative that we grow this population as it reflects the future success of our community," said Peggy O'Shea, President & CEO of The Foundation. "The Chamber — with its new young professionals group Catalyst — is perfect to lead this initiative."

Catalyst serves young professionals ages 21 through 40. "We believe Joan Snyder's training will help steer us in a direction that will allow us to use our millennials in

the best way possible, so that we can grow our businesses and keep our young professionals here to keep our economy thriving," said Pamela Matt, executive director of the Greater Utica Chamber of Commerce.

Events included a private training from Kuhl (who co-authored "Young Globals" with John Zogby) for Catalyst Steering Committee members and a breakfast for women focused on the power of mentorship, multi-generational dynamics in the workforce and successful negotiations.

Millennials who attended the training left with what they said would help them to succeed in their workplaces. Communication techniques, including negotiation

and compromise, were among the top skills taken from the event, attendees said.

"Joan Snyder Kuhl was able to engage and get the wheels of change turning without disrupting the dynamic of the group," said Catalyst Steering Committee member Katie Reilly, 28, of Utica. "She provided me with a new way to think about not only my own position within the group and as a young millennial, but also where the group as a whole was headed. Different from other trainings I have attended, she spoke with us and not at us. It was an important step in the advancement of Catalyst within the community."



Joan Snyder Kuhl



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