

Foundation

LETTER

MINI SCHOOL BUS FOR THEA BOWMAN HOUSE

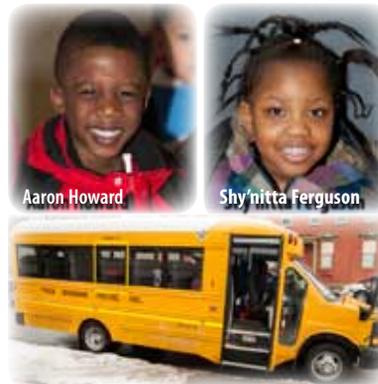
ON THE ROAD TO A BETTER FUTURE

Geoffrey Canada made it clear that brighter futures for our children and community start with education. In Utica, that begins with the Universal Pre-K Program funded by the City School District. But the program can't help youngsters unable to get there.

For those attending the pre-k class at Thea Bowman House, regular transportation is now provided on a new mini school bus the agency was able to purchase with a \$55,000 grant from The Community Foundation.

The vehicle holds up to 36 students, like Aaron Howard and Shy'nitta Ferguson, who often are from working and economically challenged families, and might otherwise not have transportation to the pre-k program. Besides boosting attendance, the bus has increased learning time and actually reduced costs.

"We realize how imperative early childhood education is and we need to make every effort to give each child in our community an equal opportunity



at success," said Sandy Wright, Thea Bowman's site director.

"Providing reliable and safe transportation — thanks to The Community Foundation — allows us one more way of evening the educational playing field for our children."

To hear Aaron and Shy'nitta tell the story in their own words — and learn more about how this grant is making a difference — visit foundationhoc.org.



SAVE THE DATE FOR RICHARD FLORIDA!

For two years, our Speaker Series has been moving local residents to action. Newark, N.J. Mayor Cory Booker's message of unity and Geoffrey Canada's message of education reform have sparked conversation, action and change in our community. Our 2013 speaker, Richard Florida, who will speak Sept. 12 at The Stanley Center for the Arts in Utica, promises to do the same.

Richard Florida is one of the world's leading public intellectuals on economic competitiveness, demographic trends, and cultural and technological innovation. International diplomats, government leaders, filmmakers, economic development organizations and leading Fortune 100 businesses have benefited from his global approach to problem-solving and strategy development. He is especially renowned for his research on the creative class, which indicates that vibrant communities grow and flourish through support for small businesses, the arts and diversity.

This vital program will be funded by our Corporate Partners (next page). We look forward to how Richard Florida can and will spark our community in conversation and change!



Richard Florida

GENEROSITY STILL RESOUNDS AT COMMUNITY FOUNDATION



It's no surprise that generosity was a theme referenced frequently in 2012 during The Community Foundation's 60th anniversary celebration. It was the *generosity* of our founders — toward their fellow men and women, their community and the region's long-term well-being — that drove the creation of our organization.

As last year came to a close, that quality was exhibited again in remarkable fashion by the more than 150 donors who responded to our annual appeal. Their gifts richly supported The Foundation's work and many honored or remembered special people, raising more than \$220,000. In addition to extending our sincere gratitude here, we have recognized those donors by listing them prominently on our website, foundationhoc.org.

Also in this issue, we are honored to recognize another demonstration of generosity by welcoming five new companies — Adjusters International, Adirondack Bank, Charles A. Gaetano Construction Corp., Clifford Fuel, and Oneida Savings Bank — to our Corporate Partners Program. These public-spirited firms have joined the 14 other local businesses that are partnering with The Foundation to improve life in Herkimer and Oneida counties today and tomorrow. We recognize and thank them all.

For further and regularly updated information about The Community Foundation, including all of our latest donors, grants, Corporate Partners, and many philanthropic programs and opportunities, I invite you to visit our recently redesigned and expanded website. For more about that, please see the story on page 4.

— *With warm regards,*
Peggy O'Shea, *President & CEO*

MARK YOUR CALENDAR CELEBRATION OF COMMUNITY LEADERSHIP MAY 22

The Community Foundation's annual event honoring donors, partners and innovative programs in our community will be Wednesday, May 22 at the Dorothy Smith Center for Advocacy at the Resource Center for Independent Living in Utica. The program will begin at 5:30 p.m. with a reception to follow.

This important event is sponsored by The Foundation's Corporate Partners. Invitations will be mailed in April. Reserve the date now!



CORPORATE PARTNERS PROGRAM

2013

The Corporate Partners of The Community Foundation of Herkimer & Oneida Counties, Inc. are area companies that have joined forces with The Foundation to:

- Address broad-based community issues
- Expand and inspire philanthropy
- Build the capacity of nonprofits to excel

We gratefully acknowledge:

Adjusters International
Adirondack Bank
Bank of America
Bank of Utica
Birnle Bus Service, Inc.
Carbone Auto Group
Cathedral Corporation
Charles A. Gaetano Construction Corp.
Clifford Fuel
Excellus BlueCross BlueShield
Fastrac Markets
Jay-K Lumber
M. Griffith Investment Services
NBT Bank
The Observer-Dispatch
Oneida Savings Bank
Pacemaker Steel & Piping Company
Staffworks, Inc.
Strategic Financial Services

OUR NEWEST FUNDS – CREATING LEGACIES.

DOMIZIO & THERESA ZUMPANO MALARA FUND

An advised fund created through the Theresa Malara Trust based on Theresa's wishes for the residual distribution of her and her husband's assets. Theresa requested the creation of "Theresa's House" for young families transitioning to living independently in the community. Her goal was to have The Foundation provide benefits for the preservation of the family or to support causes that promote Catholic values. Her lifelong comfort from having a connected and loving family and a strong faith will endure.

BENJAMIN ZAHIR MUFTI SCHOLARSHIP FUND

This memorial scholarship fund honors a man whose life was ended far too soon in a car accident. It was created through the liquidation of a life insurance policy within a trust established for Barbara Mufti, Benjamin's mother. The award is for a graduate of New Hartford High School who meets the scholarship criteria with a preference for candidates planning to major in English or pursue creative writing.

SCOTT STUART FUND FOR INLET

A donor-advised fund created by the Stuart Family in memory of R. Douglas "Scott" Stuart III, as a legacy to his passion for life and family and his love of the Adirondacks, especially the family camp on Fourth Lake. The fund will be advised by a committee of Stuart family members who will recommend grants from income and principal that will benefit the residents of Inlet, New York, and/or surrounding communities, perpetuating Scott's philanthropy and generosity for years to come.

DONNA LATOUR-ELEFANTE MEMORIAL FUND FOR CHILDREN

An advised fund was created from tributes made in memory of Donna LaTour-Elefante that were matched by a friend and advocate of children, David Zumpano. Donna embraced a personal vision that "every child would be nurtured by at least one adult in their lifetime." This fund will be used exclusively for children and families, including support of the Family Nurturing Center of Central New York, of which Donna was founder and executive director. Her passion lives on through her legacy.

HIGH GROWTH ENTREPRENEURSHIP FUND

Martin Babinec is committed to inspiring an entrepreneurial renaissance in Upstate New York. Following his success in founding a large Silicon Valley-based company, which provides on-demand HR services to emerging tech companies, he founded Upstate Venture Connect. This nonprofit works to accelerate the number of high-growth tech startups in Upstate NY. The High Growth Entrepreneurship Fund is a donor-advised fund that seeks to engage other leaders in the Mohawk Valley who share in the vision that future job creation and the ability to retain and employ our best and brightest talent rests not with big companies, but in creating an environment that makes it easier for first-time entrepreneurs to get connected to people and resources who can help them develop new industries.

EDWARD BEHEN BRADLEY, JR. MEMORIAL FUND

A donor-advised fund created with the memorial gifts of family and friends to remember this extraordinary man who lived his life with great ardor, dignity and grace, despite severe physical challenges. A wheelchair athlete, talented musician and community advocate, Ed Bradley found opportunities to succeed beyond and despite his disabilities. His parents, Edward and Mary Lyons Bradley, will recommend grants in his name to inspire others to do the same.

May we help you create a fund? What would you like to accomplish? Contact Elayne Johnson, Director of Fund Administration, at 735-8212, for assistance.

Charitable Gift Annuities **Make a Gift Now, Receive Income for Life**

In December, The Community Foundation developed a new program that allows individuals to make a gift now and receive fixed, secure payments for life. The tool — a charitable gift annuity — is designed to help you meet your needs while being charitable.

Individuals use charitable gift annuities to increase retirement income, provide income to elderly parents or loved ones, or to have the income when needed — all while supporting the future of our community. Gift annuity rates range from 4.4 percent to 9 percent depending on the age of the income beneficiary.

To learn more about this great tool, e-mail development@foundationhoc.org, visit foundationhoc.org/plannedgiving, or call the office at 315-735-8212.





OFFICERS

Larry Bull CHAIR
Keith Fenstemacher CHAIR-ELECT
Don Carbone SECRETARY-TREASURER
Peggy O'Shea PRESIDENT & CEO

TRUSTEES

Mary Lyons Bradley Susan Matt
Richard Callahan Mary Morse
Linda Cohen Ann Marie Murray
Ronald Cuccaro Judith V. Sweet
Burt Danovitz Richard Tantillo
L. Michael Fitzgerald Rev. Robert Umidi
Georgiana Roberts Ide Eve Van de Wal
David Jones Bonnie Woods

STAFF

Peggy O'Shea PRESIDENT & CEO
Cassandra Baber MARKETING &
COMMUNICATIONS OFFICER
Wendy Caliguire DATA MANAGER
Lindsey Costello EXECUTIVE ADMINISTRATIVE ASST.
Barbara Henderson VP FOR PROGRAM &
COMMUNITY INITIATIVES
Elayne H. Johnson DIRECTOR OF FUND
ADMINISTRATION
Gilles G. Lauzon DIRECTOR OF FINANCE
Marie Piayai PROGRAM OFFICER
Denise Salvatore CONTROLLER
Jan M. Squadrito SENIOR PROGRAM OFFICER



PHONE: 315.735.8212
WEBSITES: foundationhoc.org
hocindicators.org
EMAIL: info@foundationhoc.org

NEW WEBSITE IS ULTIMATE CONNECTION TO COMMUNITY FOUNDATION

Grants come alive in compelling videos and photos. Donors are engaged in ways they can make a difference. Timely news and activities are shared via social media — Facebook, Twitter, LinkedIn and RSS feeds.

All of this and more is now available on The Community Foundation's website, foundationhoc.org.

"It's new from the ground up, and in both form and function is state-of-the-art in every way," said Cassandra Baber, Marketing and Communications Officer. "From a recap of our earliest days,

to all that we are doing today, to how our broader new role of advancing leadership on community solutions is carrying us forward, it's all powerfully presented.

"The site will keep our constituents up to date on The Foundation's work and progress better than ever. We invite and encourage everyone to visit it often."

