In August, The Foundation formed an exciting partnership with the Rome City School District that has the potential to dramatically increase the graduation rates for at-risk students. The joint effort has brought the impactful and nationally-recognized youth development program Hillside Work-Scholarship Connection to Rome schools.

“Hillside’s established reputation for success will allow us to grow a more educated workforce and ultimately healthier community,” said Foundation President and CEO Peggy O’Shea. The Foundation invested $95,000 in start-up funding, $20,000 of which came from The Mele Family Fund. “The partnership directly impacts education in our community, a priority area investment for The Foundation.”

The established program helps students overcome learning barriers while connecting them to work opportunities. Hillside already has led to significant success in Rochester, Syracuse, Buffalo and Prince George’s County, Md. In Syracuse, 96 percent of students who participated in the program and completed Hillside’s Youth Employment Training Academy graduated on time.

The program is especially important as it will help the community to reach the 25/25 goal — to increase the percentage of bachelor’s degrees in our two counties to 25 percent by 2025.
Dear friends,

Making the decision of when to step away from a job that has come to define my life was terribly difficult. When we love our job, profession and place in the community, it is impossible to imagine life without it. Many people stay beyond their optimum time. I promised myself that would not happen and, in the end, declared December 2014 would mark my final days as Foundation President and CEO.

I am leaving the position that has opened my eyes and my heart to the critical needs of our community.

I am leaving an organization that has an integral place in our two-county region.

I am leaving behind a foundation that has become the intersection of community needs and solutions, collaborator and valued resource. It’s been thanks to your partnership that The Foundation has evolved in this impactful way.

Historically, we acted in a reactive way — waiting for information about community needs and deciding which grant requests to fund. We have evolved into a social impact investor, identifying the needs of our community through data and research and investing in the areas of our community where the most need exists. Through strategic partnership, we have positioned ourselves at the forefront of our community, not waiting to be approached, but taking the first step. From partnership to impact to investment, this shift only benefits you and your community.

And at an opportune time.

Conversations about our community have become positive. Entrepreneurs have made their marks in visible ways. Creativity has taken root. Whether entrepreneur or creative thinker, we all have a role to play, and I know our paths will continue to cross.

“Whether entrepreneur or creative thinker, we all have a role to play, and I know our paths will continue to cross.”

I will forever cherish my time at The Foundation.

With warmest regards,

Peggy
FOUNDATION, thINCubator PARTNERSHIP SPURS ECONOMIC DEVELOPMENT IN UTICA-AREA

One of the partnerships created this year has been with thINCubator — a new business incubator and student accelerator designed to promote entrepreneurship.

The partnership with thINCubator answers a need for more economic development as identified on hocindicators.org, a website commissioned by The Foundation and partners in 2010. The Foundation invested $84,000 into thINCubator’s start-up.

thINCubator has secured support from dozens of community mentors, who work with student teams during a 14-week program in refining their business ideas in order to pitch them to potential investors.

Among the inaugural teams were a cyber-services firm led by two MVCC students, a husband-and-wife team of SUNY IT alumni with a device that promotes medication adherence, and an MVCC student-led team with a mobile app for local buyer loyalty. These entrepreneurs worked closely with thINCubator mentors led by nationally recognized expert John Liddy, entrepreneur in residence.

NEW CEO SUPPORTS FOUNDATION’S VISION FOR THE FUTURE

The Foundation’s board has appointed Alicia Dicks as the next President and CEO.

As president of Fort Schuyler Management Corporation, Dicks has been leading the development of the $1.5 billion nanotechnology project at SUNY Polytechnic Institute. She will succeed retiring Foundation President and CEO Peggy O’Shea, who has led The Foundation since 2005.

A search committee of community leaders and Foundation trustees chose Dicks from 200 applicants. Executive search firm BoardWalk Consulting advised the committee throughout the nearly year-long process.

Alicia’s success in capacity building, urban planning, project management and economic development support The Foundation’s vision and goals for supporting the community’s growth. Her proven ability to inspire and manage collective impact, paired with a passion for the success of our region, marked Dicks as a natural fit to lead The Foundation.
The Foundation welcomed a crowd of more than 1,200 people to its fourth annual Corporate Partners-sponsored Speaker Series Thursday, Oct. 16, featuring New York Times bestselling author Dan Heath. Before Heath took the stage of the SUNY Poly Wildcat Field House, attendees gathered for a pre-event to exchange ideas with 21 community thinkers who have made change in our area despite challenges. Heath’s discussion pointed to these thinkers and other key people in our community as “bright spots” to be nurtured. He also shared hands-on tools for making change when change is hard and making that change stick. View photos from the event plus full details on Heath’s community-inspiring advice at www.foundationhoc.org.
PAST SPEAKER SERIES SPEAKERS:

2013
Urban theorist
Richard Florida

2012
Education changemaker
Geoffrey Canada

2011
Forward-thinking
Newark Mayor (now Senator)
Cory Booker
The Foundation recently connected with donor advisor Laura Kieffer. Thirty-year-old Kieffer, of San Diego, Calif., advises the donor-advised fund created for her grandmother Beatrice Cavaretta Faga. When her mother Maryellen Faga Kieffer passed away, Kieffer found herself advising a fund for a community where she had never lived. With the help of The Foundation’s program officers, Kieffer discovered a similar passion for the area her mother and grandmother loved by investing in the areas they were most passionate about.

What have been the benefits for you of working with The Foundation’s program officers?
They are working with the different organizations, they have partnerships. They know the money is substantially going to trickle down to the people who need it and being able to target what people really need in the community. You couldn’t do that without the guidance.

What does it mean to you to be able to carry on the legacy of your family?
It makes me feel more connected to them. I’m sure my mom felt the same way. She had advised the fund and she felt connected and you’re honoring those people. I always think about it as something that made them happy or honored their memory … and you’re also doing something really good in addition to that.

What investment have you made through the fund you are most proud of?
It was one of the much smaller investments. There was an opportunity to buy children tap shoes (for children taking dance lessons at Thea Bowman). Marie (The Foundation’s Program Officer, at the time) sent me the video of them and how much the tap shoes meant to them. It was such a nice thing and hearing how important it was really was fun for me. Education is definitely important to me and the fund, but it’s the little things that improve quality of life that have so much meaning.

THE FOUNDATION WELCOMES NEW CHARITABLE GIFT ANNUITY PROGRAM PARTNERS

The Foundation recently welcomed two new nonprofits into its Charitable Gift Annuity Program for Nonprofit Organizations. The Utica Public Library and Parkway Center joined the valuable program to provide their donors with another giving opportunity with big impact potential.

A Charitable Gift Annuity is a giving opportunity allowing donors to support a favorite nonprofit while receiving a fixed payment for life and a charitable deduction. It’s a chance for a donor to make a significant gift during his or her lifetime, especially when income could be a concern in the later years of life.
OUR NEWEST FUNDS

- **Our Lady of Lourdes Fund for Basic Human Needs.** Ron and Sheila Cuccaro wanted to support the basic, urgent and unexpected needs of families and individuals in distress. They will do that through the creation of a designated endowment fund that will support Our Lady of Lourdes Church’s outreach program that provides food, clothing, shelter, medicine and immediate aid to area residents in need.

- **John H. Jr. & Nicole M. Hobika Family Fund.** John H. Hobika, Jr. created this future field-of-interest fund through the gift of a life insurance policy of which The Foundation has become owner and beneficiary. Per the donor’s wishes, the endowment will ultimately support health and medical needs of the community, including the funding of programs, services and capital improvements to medical facilities. The fund will build over time through lifetime gifts.

- **Henry & Miriam Kashiwa Fund for the Adirondacks.** Miriam Kashiwa has created a designated fund that reflects her passion for the Adirondacks, the arts and VIEW/The Arts Guild of Old Forge Inc. The fund will provide a memorial award for the annual American Watercolor Exhibition (in tribute to Judith and A. Richard Cohen), support for the Eco Gallery, and the general operations of VIEW.

- **Erich & Ruth Kupfer Memorial Fund.** Peter Kupfer, of California, and Paul Sinclair, of the United Kingdom, collaborated to create this endowment to provide a community service award to a Little Falls high school graduate in honor of their cousins and longtime Little Falls residents Erich and Ruth Kupfer. The Foundation received an international grant — the first in its history — to begin the fund as an acorn fund. Additional gifts from family and friends will grow the fund to reach the minimum.

**Correction.** In our last newsletter we announced the creation of the Ronald D. Christy Sr. Memorial Fund. The correct name of the fund is the Roland D. Christy Sr. Memorial Fund. Our sincere apologies for the error.

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.

We are pleased to partner with and offer these important services to
- Hospice & Palliative Care
- Mohawk Valley Community College
- Parkway Center
- Presbyterian Homes & Services
- Utica Public Library.

For more on our CGA Nonprofit program, please visit foundationhoc.org/cga-nonprofit-partnership/.

PARTNER WITH THE FOUNDATION, RECEIVE INCOME FOR LIFE

Did you know you can make a gift now to The Community Foundation and receive fixed, secure payments for life for yourself and up to one other person?

The tool — a charitable gift annuity — is designed to help you meet your needs while giving back to your community.

You can use your charitable gift annuity to increase retirement income, generate income to loved ones and provide a partial income tax deduction.

Gift annuity rates range from 4.4 percent to 9 percent depending on your age when the annuity payment begins.

Learn more. Visit foundationhoc.org/plannedgiving or contact Director of Development Kristi Brennan at kbrennan@foundationhoc.org or (315) 735-8212.
MAKING IMPACT THROUGH PARTNERSHIP – THE POWER OF COLLECTIVE IMPACT

At The Foundation, we believe partnership equals impact. This fundamental belief recently was strengthened when we learned about the power of collective impact.

We shared that knowledge in a workshop for local organizations thanks to financial support from The Foundation’s Corporate Partners. During that workshop, Foundation President and CEO Peggy O’Shea, shared the importance of collective impact for our two counties and how to make it happen here.

What is collective impact?: A model that seeks commitment from a varied group to solve a specific social problem using a structured form of collaboration.

Why collective impact?: Organizations working alone are not as effective in solving social issues, according to research. Coordinating efforts around a clearly defined goal creates more meaningful and sustainable impact.

Why The Foundation supports collective impact?: The Foundation’s very existence relies on partnership and impact. Our donors seek the biggest impact from their investments, and, as social impact investors, we seek solutions that provide sustainability for our two counties.

To learn more about collective impact, contact Vice President for Programs and Community Initiatives Barbara Henderson at bhenderson@foundationhoc.org or at (315) 735-8212.

In June, The Foundation welcomed Shannon Wheelock to its staff. Shannon joined The Foundation as an intern first in February. When a part-time accounting clerk position opened, Shannon became an obvious choice.

Shannon currently is studying business management at Mohawk Valley Community College. She plans to continue her education until she reaches her goal of becoming a CPA.

Shannon lives in Oneida with her boyfriend, her cat Kitten and two Australian flying squirrels. (Yes, you read that right. More on those critters in a future newsletter.)