

*Community Foundation of Tompkins County*

*growing*

*gathering*



*giving*

*granting*

*2006*



*Founded in 2000, the Community Foundation of Tompkins County exists to encourage and support local philanthropy and civic engagement as a means of sustaining and enhancing the quality of life for those who live and work in Tompkins County.*

### *Mission*

To encourage and develop sustainable philanthropy for a broad range of community efforts by

- making strategic grants as community investments
- encouraging the growth of a permanent charitable endowment
- providing donors with vehicles to make giving easy and effective
- serving as a catalyst and convener

### *Member*

Council on Foundations  
Grantmakers Forum of New York  
Tompkins County Funders Group  
Tompkins County Chamber of Commerce

SECTION 1

*growing*



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*giving*



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SECTION 3

*granting*



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SECTION 4

*gathering*



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*growing*



### *Perpetual Dedication*

The Lenore Coral Fund established by Ms. Coral at her passing has made the Community Foundation's first grant from a bequest. Her lifelong passion for musical libraries is honored and memorialized with this permanent charitable asset established at, and safeguarded by, the Community Foundation. Each year, the U.S. office of the Répertoire International de Littérature Musicale (RILM) will receive vital support, as was Ms. Coral's intent. Her commitment, foresight, and dedication will help enable RILM to grow in stability through this ongoing annual support.



*“Lenore Coral founded the U.S. RILM office at Cornell in 1984, and she remained passionate about its service to the scholarly community until her death in 2005. Editor-in-chief of RILM, Barbara Mackenzie, said of Lenore, ‘A stronger, more determined, more devoted*

*supporter RILM has never had.’ We anticipate that Lenore’s bequest will enable us to expand our contributions and increase the representation of U.S. publications in the database. The Lenore Coral Fund represents not only Lenore’s dedication to RILM but also the commitment of the U.S. scholarly community to this important international project.”*

*—JULIE SCHNEPEL, ASSISTANT DIRECTOR, RILM*



### *Planning Now for Future Impact*

Earlier this year, an anonymous individual was seeking an effective estate planning method to devote resources to charitable purposes in the Ithaca community on a perpetual basis. This individual has selected the Community Foundation to be the agent to ensure that those resources are used in the most effective manner with the greatest potential for positive impact. A trust will be created at the donor's death which will generate income, a percentage of which will be donated annually to support the Community Foundation's grant making in areas of the donor's designated wishes.

*"We are honored to have been selected based on our knowledge of community needs and providers. This is the perfect match of charitable intent, donor resources, and Community Foundation know-how all combined to deliver substantial community benefits."* —GEORGE P. FERRARI, JR., EXECUTIVE DIRECTOR



## *Nurturing Encouragement in Philanthropy*

Lory Peck established a donor advised fund at the Community Foundation in the summer of 2004 to support his varied charitable interests. Additional contributions to the fund and earnings from the prudent investment management of the foundation provided assets

from which to consider grant opportunities. Lory nominated a number of grants from the fund to local nonprofit health and human service agencies. After experiencing the ease and efficiency of working with the Community Foundation to execute these grants, he made an additional grant nomination to support the foundation's operations.



*“Being able to count on local people who love this community as I do gives me confidence and encouragement in my philanthropy. My support of the Community Foundation is an investment in a permanent asset to help everyone contribute and take action.”*

—LORY PECK, COMMUNITY FOUNDATION  
SPONSOR AND DONOR ADVISOR

## *Planning a Gift—Expanding the Results*

The Community Foundation seeks to inspire you to make gifts in support of your values and passions, to nurture ideas in which you believe, and organizations and people in whom you have confidence.



### **We invite you to think beyond:**

*Your annual giving*  
*Your typical ways of contributing*  
*Your usual thoughts of how to help*  
*Your lifespan*

- You can do more than you imagine now, and you can do it for a long time.
- We can assist you to customize a way of making gifts to the Community Foundation that will achieve your objectives now and in the future.
- By making a planned gift and creating a legacy, you can inspire others.
- Ask yourself what you can give and what you can do, both now and into the future.



# *The Legacy Society of the Community Foundation of Tompkins County*

The Legacy Society honors and assists individuals who establish planned gifts with the Community Foundation of Tompkins County. For those who wish to perpetually benefit the communities and organizations located in Tompkins County, the Society promotes sustainable philanthropy through planned giving opportunities. Members have the joy of helping their community while they secure financial options for themselves and their heirs.

Planned giving is truly a “win-win” opportunity for you and the community. As a vehicle for charitable giving, the Community Foundation offers the advantages of tax savings, simplicity and flexibility, and administrative convenience, as well as sound fiscal management. Through various estate planning options, Legacy Society members have the chance to maximize family and financial benefits while addressing philanthropic goals that might otherwise seem unreachable.

Planned gifts include bequests in a will, life income agreements, trusts, flexible endowments, real estate with retained life use, retirement plans, and life insurance.

## What Gift Planning Can Do for You

- Provide support to your community perpetually into the future
  - Generate current income tax deductions
  - Produce lifetime income for you and your spouse
- Complement or complete your existing estate planning
  - Reduce or eliminate estate taxes

## Planned Giving: Choose the Gift that Matches Your Goals

If your goal is to:	Then you can:	And your benefits are:
Support the Tompkins County community	Put a bequest in your will to benefit the Tompkins Today and Tomorrow Fund or Field of Interest Funds of the Community Foundation	Your generosity benefits the Tompkins County community forever as it changes and new needs emerge. The Community Foundation can manage your bequest to address these issues and you receive estate tax deductions and keep assets in your name during your lifetime.
Maximize heirs’ inheritance while benefiting the Community Foundation and Tompkins County	Name the Community Foundation as beneficiary of your retirement plan; leave other assets to your family	Reduced estate and income taxes
Secure a life income while minimizing taxes	Establish a Charitable Remainder Trust with the Community Foundation	Tax benefits and often a boosted rate of return from assets
Reduce gift and estate taxes on assets you pass to your children and grandchildren	Create a Charitable Lead Trust that pays income to the Community Foundation for a specific term of years	A gift or estate tax deduction and your family keeps the assets
Make a large gift with little cost	Give a life insurance policy you no longer need	Current and possible future income tax deductions
Make a revocable gift during your lifetime	Name the Community Foundation as the beneficiary of assets in a living trust	Full control of the trust and its assets during your lifetime





## *Types of Gifts*

- The Community Foundation specializes in helping donors develop customized philanthropic action plans for a broad range of their assets, using a variety of giving tools.
- Community Foundation of Tompkins County recommends that all charitable giving plans be discussed with your professional advisor. See *How to Make a Gift* in the Donor section of our website at [www.communityfoundationoftc.org](http://www.communityfoundationoftc.org) for more information.

**Gifts of Cash** We gladly accept gifts of cash to support our Tompkins Today and Tomorrow Fund, Field of Interest Funds, or to establish a Donor Advised Fund.

**Gifts of Securities** Stocks or bonds that are now worth more than when you acquired them, can also be used to make a gift. In addition to IRS income tax deduction benefits, you also may reduce or eliminate capital gains tax on the appreciated value of the securities.

**Gifts of IRA Distributions** New regulations invite special consideration of direct distribution to the Community Foundation with tax benefits to certain donors.

**Gifts of Retirement Plans** Simply name the Community Foundation as the beneficiary of your plan. The foundation will not pay income tax, and the gift would qualify for a charitable deduction against any estate tax.

**Gifts of Life Insurance** You can donate your policy to the Community Foundation and receive an immediate tax deduction (usually an amount equal to the cash surrender value). If you make additional donations sufficient to pay the annual premiums, the foundation can keep the policy in force.

**Gifts of Real Estate** You can make a gift of real estate to the Community Foundation, and upon sale the net proceeds are available to the foundation. Possible gifts include homes, farms, vacation property, undeveloped land, or commercial property. You also have the option of retaining the right to use the property during your lifetime and gifting the remainder value of your home, farm, or other real estate to the Community Foundation. Gifts of real estate may result in significant income, capital gain, and estate tax benefits. Note that gifts of real estate present special issues, and the foundation board must expressly accept the gift.

**Gifts of Closely Held Securities** A gift of closely held securities can be an effective strategy to transfer ownership of your business and gain potential tax benefits. Again, given the unique issues involved in closely held businesses, the foundation board must expressly accept the gift.

**Charitable Bequest** You can make a bequest in your will to the Community Foundation for a specific amount, a particular asset, or a remainder interest. The bequest can support the Tompkins Today and Tomorrow Fund, or create or add to a fund for a particular Field of Interest, be designated for specific charities, or be used to create a named fund.

**Life Income Gifts** The Community Foundation offers a variety of vehicles that provide you and other beneficiaries you select with charitable and estate tax deductions and lifetime income. These vehicles include Charitable Remainder Trusts, Charitable Lead Trusts, and Pooled Income Funds. Each offers a unique set of benefits.

**Transfer a Private or Family Foundation** A private foundation can become a Supporting Organization; its board can become the advisors that direct disbursements from the fund. If the private foundation board disbands, the Community Foundation board can continue to administer the fund to support the purposes for which it was formed.

## *Dedicated Volunteers*

A very important component of building the long-term strength of the Community Foundation is the commitment of volunteers. Philanthropy is all about people deciding to dedicate resources to build community, improve the quality of life, and to solve problems. All are encouraged to participate to help advance the mission of the foundation.

The Community Foundation enjoys the support of a strong volunteer board and also the support of the special volunteers listed below. We acknowledge with deep appreciation their generous donation of time and expertise.



*Beverly Baker*

*David Call*

*Michael Cannon*

*Carol Chernikoff*

*Mary Beth Gehring*

*Janet Hawkes*

*Anna Holmberg*

*Joan Jacobs Brumberg*

*Carol Kammen*

*Jacquie Lewis*

*Karen Macier*

*Ann Mathews*

*Leo McGrattan*

*Nina Miller*

*John Rudd*

*Caitlin Schryver*

*Lynnette Scofield*

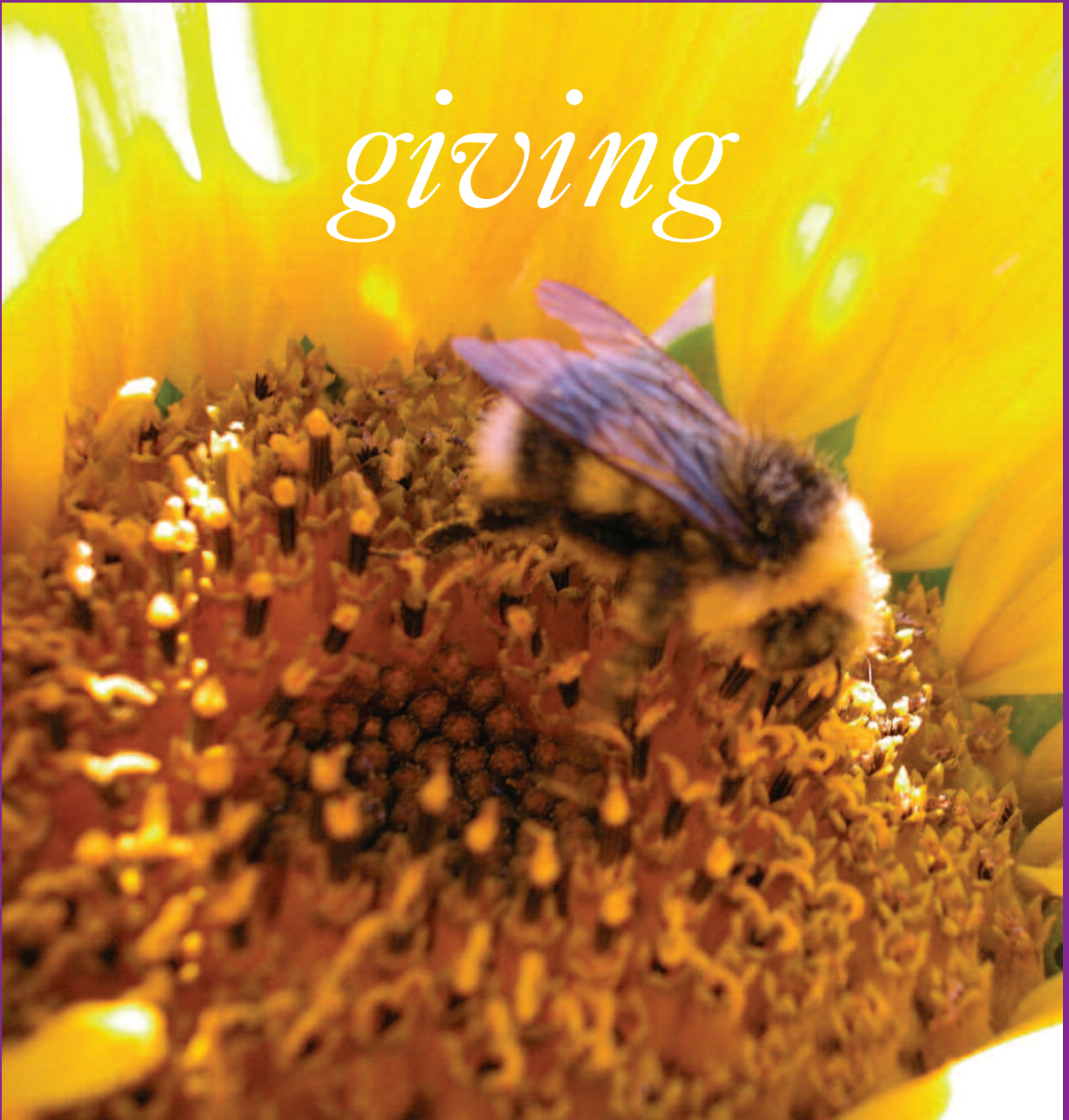
*John Semmler*

*Deirdre Silverman*

*Paul Streeter*



*giving*





### *Encouraging Others to Claim Their Power*

Community activist and longtime Ithaca resident Nancy K. Bereano established the Adele and Herman Kirp Memorial Scholarship for Social Justice after the death of her parents. As a person who has spent her life deeply involved in issues of social justice and change, Nancy was looking for a way to both acknowledge her parents' gift and extend her involvement in the Ithaca community. Working in cooperation with the Lehman Alternative Community School, Nancy interviewed each of the outstanding students nominated for the award, all of whom had demonstrated their commitment to challenging the societal constraints that result in discrimination and inequality. In June, the first scholarship was awarded by the Community Foundation to Larissa Anderson.



*“Even though my world, politically and socially, is quite different from my parents’, I wanted to do something that would be an on-going connection between them, the values they helped instill in me, and the future. I hope that this scholarship can encourage young people to believe that living an activist life is both desirable and possible.”*



—NANCY K. BEREANO, COMMUNITY ACTIVIST

### *Engaging All to Take Action*

The League of Women Voters of Tompkins County is a membership organization which also has an educational mission for the entire community. The League decided to open a donor advised fund to advance its broad and non-partisan mission for voter education and civic engagement.

This is the first time that a membership organization has partnered with the Community Foundation to create a philanthropic asset for the benefit of everyone in our county. Donations to the League's education fund are tax deductible, the League grows a financial asset for its work, and we all benefit as they invite and enable more people to participate in the public arena.



*“We saw the fund at the Community Foundation as one of the ways for us to better achieve our voter education mission. Perhaps more people will understand and support our work as they learn of the fund.”*

—ALENE WYATT, LEAGUE OF WOMEN VOTERS OF TOMPKINS COUNTY

### *Efficient and Effective*

Local businessman, community leader, and former elected official Joe Daley recently opened a donor advised fund. The ease of starting the fund, the flexibility of nominating grants for a wide variety of interests, and the local management of the fund were all attractive reasons to work with the Community Foundation. Joe also liked the socially screened investment option available for his initial gift and all future gifts into the fund. His first nominated grant is for the Cayuga Waterfront Trail's new Farmers' Market Trailhead.

*"In my business I realize that efficiencies mean a lot, which is why I signed up with the Community Foundation to assist me with my charitable work. I have a long history as a supporter of the Ithaca Farmers' Market at this location. I am an avid cyclist, so the trailhead is the perfect first grant from my donor advised fund."*

—JOE DALEY, DONOR ADVISOR





## *Funds Serving You and Your Community*

The Community Foundation takes seriously the responsibility and honor to be the steward of the resources entrusted to us. These funds enable us to improve the quality of life and to solve problems for the residents of our community, now and in perpetuity.

We are both experienced in and committed to prudently investing these funds so that they will always be available for charitable purposes.

### **FOUNDATION FUNDS**

*Tompkins Today and Tomorrow Fund* represents the sustainable base of support for the Community Foundation in which gifts are reserved to ensure that the foundation's grant making thrives in perpetuity. This fund enables the Community Foundation to be more immediately responsive to emerging problems and to convene community conversations and collaborations today. Unrestricted gifts support our role as grant maker and represent our greatest current need. Individuals, groups, or corporations are invited to make a three-year pledge for annual \$1,000 gifts at the Benefactor level, for annual \$500 gifts at the Sponsor level, or for gifts at any chosen level to assist the foundation in this important phase of our growth.

*Field of Interest Funds* include defined areas of interest such as: Children and Youth, Health and Human Services, the Environment, Arts and Culture, Sustainable Communities, and the Women's Fund.

**DONOR ADVISED FUNDS (DAFs)** enable donors to establish a fund, the earnings from which are nominated to be considered for charitable giving in Tompkins County and elsewhere for a wide variety of interests. These funds continue to grow over time with additional gifts and investment earnings. Donors may be individuals/families, nonprofit or for-profit corporations, or an unincorporated group of community members. The funds may also serve as fitting memorials or tributes in perpetuity. The beneficiaries of these funds do not need to be identified at the time of fund creation and can change over time to respond to emerging community needs and donor interests.

**DESIGNATED FUNDS** allow donors to identify and guide the Community Foundation to make their gifts automatically to a specific agency or purpose. Donors can be individuals/families, nonprofit or for-profit corporations, or an unincorporated group of community members. The funds may also serve as fitting memorials or tributes in perpetuity. The beneficiaries of these funds do need to be identified at the time of fund creation and remain fixed.

*All grants from any fund are reviewed by staff to ensure legal eligibility. Final action is determined by the Community Foundation Board of Directors. All gifts to the Community Foundation are tax deductible to the extent allowed by law.*

*Each type of Community Foundation fund of a certain size may be permanently named for an individual, a family, an organization, or a business. The legacy created by naming a fund creates a lasting tribute to the values and passion of those honored or memorialized.*



## *Donor Advised, Designated, and Scholarship Funds*

**ESTABLISHED JULY 31, 2005–AUGUST 1, 2006**

### **The Advocacy Center Fund**

#### **Anonymous Fund**

*A new fund created in this period*

### **The Dorothy L. Allen Black Music Fund**

*Established to support Gospel music in traditional African American congregations*

### **The Edith W. Showacre Memorial Fund**

*Established to memorialize Edith W. Showacre (1929–2005), a beloved and admired Ithaca High School English teacher and dedicated community member*

### **The Joe Daley Community Fund**

*Gives back to the community through grants to the arts, athletics, and the environment*

### **The League of Women Voters of Tompkins County Education Fund**

*Supports the educational mission of the League of Women Voters of Tompkins County*

### **The Lynette Molesky Scofield Fund**

### **The Shelley and John Semmler Fund**

### **The Ujeni Grants for Advancing Public Education Fund**

*Established to provide educational opportunities, this fund encourages life-long learning and promotes quality education that prepares students to become contributing members of our ever-growing and changing society.*

### **The Yarussi Family Fund**

**ESTABLISHED IN 2000**

### **The Howard Hartnett Fund**

*One of the first funds created by a private individual at the Community Foundation of Tompkins County; supports a broad range of community needs*

### **The LoPinto, Schlather, Geldenhuys and Salk Fund**

*Supports the firm's gifts to the community*

### **The Q-G Fund**

**ESTABLISHED IN 2001**

### **Johnson Graduate School of Management Community Impact Fund**

*Supports grants to the community by the students of the Johnson Graduate School of Management, Cornell University*

### **The Miller Mayer Fund**

*Supports the firm's gifts to the community*

**ESTABLISHED IN 2002**

### **The Carman and Sandra Brink Hill Fund**

### **The Children and Youth Fund**

### **The EDGE Fund**

*Supports projects that benefit the Tompkins County community in the context of a global vision for progressive social change including peace, social and economic justice, environmental sustainability, and human rights*

### **James E. Lawrence Environmental Memorial Fund**

*Established to honor the life of James E. Lawrence, a dedicated conservationist and environmentalist. Grants from the fund support his love of the natural world through local and regional conservation projects.*

### **Reverend David N. Gramkee Community Fund**

*In honor of Reverend David N. Gramkee's personal commitment to social ministry and community projects throughout the Ithaca, Elmira, Seneca Falls, Auburn, and Rochester areas, the fund is dedicated to the support and enhancement of ministry programs and activities in our region.*

### **The Ridenour Family Fund**

### **Satya P. and Chandra Talpade Mohanty Progressive Fund**

### **True Insurance Community Fund**

**ESTABLISHED IN 2003**

### **The Browning Fund**

*Supports local organizations*

### **Cascadilla Boat Club Fund**

*Supports the scholastic rowing program for high school athletes in our community through donations from businesses, private donors, grants, and charitable organizations*

### **Discovery Trail Partnership Fund**

*The Discovery Trail, a group of organizations engaged in informal education in Tompkins County, promotes public awareness and understanding of the connections among art, history, literature, science, and the natural world. Discovery Trail Partnership members include: Cayuga Nature Center, Cornell Lab of Ornithology, Cornell Plantations, Johnson Museum of Art, PRI's Museum of the Earth, Sciencenter, The History Center, and the Tompkins County Public Library.*

### **Dryden Youth Opportunity Fund**

*Provides resources for the benefit of the youth in the Dryden community by funding innovative programs that enrich educational and community services*

### **Family & Children's Service of Ithaca**

*Builds Family and Children's Service's capacity to assist children, adults, and families facing life challenges. Services include mental health and crisis counseling, guidance for troubled youths, home care for the elderly and ill, adoption consultation, employee assistance, and advocacy for crime victims.*

### **The History Center Fund**

*Supports the History Center's vision to change people's understanding of the past in order to enhance their lives in the present and to create their future*

### **The Hinchcliff Family Fund**



### **Kitchen Theater Fund**

*Supports the programs and activities of the Kitchen Theater*

### **Newfield Central School Fund**

*Provides financial support for educational enrichment not included in the school district's operating budget for the benefit of the children of the Newfield school system during the time they are enrolled*

### **The Sandy and Jay True Fund**

### **Village Camp Fund**

*Established in order to generate scholarships for children with limited financial resources to attend the Village Camp and other Earth Connections Programs. Village Camp and Earth Connections Programs are designed to reconnect children to the earth through hands-on outdoor living and survival skills, and earth exploration activities.*

### **Wilcox Press Donation Fund**

*Supports the company's gifts to the community*

## **ESTABLISHED IN 2004**

### **Alex Haley Pool Fund**

*Provides summer fee scholarships for neighborhood youth, grants for pool enhancements, and supports lifeguard training for neighborhood youth*

### **Alternative Community School Bike Path Fund**

*Supports the programs and activities of the Alternative Community School's bike path project*

### **Community Development Education Fund**

### **Community Health Foundation of Western and Central New York Fund**

### **Crime and Sexual Assault Victims Fund**

*Benefits agencies and organizations that help victims of crime and sexual assault*

### **David Kuckuk and Sheila Danko Donor Advised Fund**

### **Erin Aljoe Schlather Dedicated Memorial Fund**

*Supports initiatives that develop leadership, responsibility, and confidence in young people, especially young women. Erin believed that it was her responsibility to make the world a better place. She inspired others to believe in themselves and in their ability to make a difference. To Erin, it never was whether the cup was half full or half empty, rather it was that the cup was not big enough.*

### **The Francille and John Firebaugh Fund**

### **Friends of the Lansing Community Library Center Fund**

*The Friends of the Lansing Library Center (LCLC) is a nonprofit organization which supports the programs, activities, and facilities of the LCLC, a reading room of TCPL. Completely staffed by volunteers, LCLC was established in July 2001 to maintain and improve the quality of life for the citizens of Lansing by providing access to information, cultural resources, and opportunities for personal enrichment.*

### **Friends of Neonates**

*Provides financial, educational, and technical support to families with neonates, professional providers of neonate services, and to institutions and organizations that provide services to those families*

### **Friends of the Youth Bureau**

*Supports the programs and activities of the Ithaca Youth Bureau*

### **The George B. Bailey Agency Fund**

*Supports the company's gifts to the community*

### **Groton Education Fund**

*Supports the educational and operational needs for programs provided to the children and students of the Groton Central School District*

### **The Hullar Family Fund**



### **Home-Learners of the Finger Lakes Fund**

*Created to increase opportunities for families engaged in home learning in the Finger Lakes Region. Grants encourage nonprofit organizations to provide resources, activities, or classes geared toward this population; or scholarships for individuals to attend activities at nonprofit organizations. All home-learners will be eligible to participate in these activities regardless of religion, race, gender, sexual preference, family composition, or method of home learning.*

### **Ithaca Asian American Association (IAAA) General Fund**

*Supports civic, social, educational, and cultural programs which promote civil and human liberties, encourage full participation of all Asian Americans, and expand the enrichment and advancement of the Ithaca Asian American Community*

### **Ithaca Downtown Partnership Fund**

*Supports programs and activities that support the strategic plan and vision for Downtown Ithaca*

### **Ithaca Health Alliance Funds**

#### **Lenore Coral Fund**

*Established by a bequest of Lenore Coral, a retired Cornell music librarian, this fund supports the Répertoire International de Littérature Musicale, an organization that archives literature and publications on music throughout the world.*

#### **Light in Winter Festival Fund**

*Supports the programs and activities of the Light in Winter Festival*

#### **Louis Perlgut Scholarship Fund**

*Benefits deserving biochemistry graduate students currently enrolled at California State University where Dr. Louis Perlgut had a distinguished career as a biochemist and coordinator of the biochemistry department. Begun by his daughter Sue Perlgut, a long-time Ithaca resident and leader in nonprofit and philanthropic activities of Ithaca. Her family joins her in this scholarship.*

#### **Mansoor Family Fund**

*In gratitude for friends, colleagues, and Cornell classmates, the Mansoor Family Fund supports charitable initiatives in Ithaca and Tompkins County.*

#### **Museum of the Earth at Paleontological Research Institute (PRI) Fund**

*This fund helps the Museum of the Earth at PRI offer multitude of activities focused on the Earth and life sciences and the relationship between science and art to diverse audiences. Activities include education programs, internships for students, public events for the community, educational publications, and natural history exhibits for visitors of all ages and backgrounds.*

#### **The Meadowgate Equine Rescue and Rehab Facility Fund**

*Established to create a facility to rescue horses that are suffering and living in miserable conditions. Recognizing that horse neglect and abuse are a serious problem, Meadowgate is a place of peace and recuperation. One of the facility's unique aspects is a Youth Program created and designed by special education teachers, certified counselors, and equine personnel, where youth of any age may attend.*

#### **National Dance Week Fund**

*Supports the mission of National Dance Week which is to heighten the awareness of Dance and its contributions to our culture. Dance is a positive, noncompetitive, cultural exchange that increases the understanding of people, their diverse cultures, mores, lifestyles, and traditions.*

### **North American Rock Garden Society—Adirondacks Chapter (NARGS) Fund**

*Supports projects to the promote rock gardening*

### **Rere Hassett Memorial Scholarship Fund**

#### **Sciencenter Fund**

*Supports the programs and activities of the Sciencenter*

### **Sustainable Tompkins Fund**

*Supports the programs and activities of Sustainable Tompkins as a community-wide collaboration*

### **Taylor Peck Fund**

#### **Tompkins County Quality of Life Fund**

*Begun by TC Legislator Michael Koplinka-Loehr to support the programs and activities of Tompkins County's Government Services. Having a permanent mechanism for voluntary contributions will enable annual efforts to supplement county programs that tax dollars could never cover.*

### **ESTABLISHED IN 2005**

#### **Adele and Herman Kirp Memorial Scholarship for Social Justice**

*Supports and encourages activism by a college-bound high school senior who has demonstrated a commitment to the ideals and practices of social justice in such areas as anti-racism or anti-homophobia work. Begun by Nancy K. Bereano, a longtime Ithaca resident and activist, in honor of her parents and the values they helped to instill.*

#### **Community Dispute Resolution Center (CDRC) "Talk Works" Fund**

*Supports the mission, activities, and programs of the Community Dispute Resolution Center*

#### **Finger Lakes Land Trust Stewardship Fund**

*Supports the stewardship of land and conservation easements held by the Finger Lakes Land Trust*

#### **Northern Lights Learning Center Fund**

*Supports the programs and activities of the Northern Lights Learning Center, a home school resource learning center*

#### **The Newfield Public Library—Lawrence E. and Lillian C. Payne Memorial Fund**

*Supports the programs and activities of the Newfield Public Library; Established in memory of Lawrence and Lillian Payne*

#### **Anonymous**

*At the request of donors, a number of funds have not been listed in this report.*



***Anyone may contribute gifts to any of these funds.***

## *Donors*

### **Community Foundation of Tompkins County** **August 1, 2005–July 31, 2006**

Community Benefactors and Sponsors are special people who commit multiyear, unrestricted gifts to support the operations of the Community Foundation of Tompkins County. We thank these leaders in our community for helping to build and enhance our work in service of solving problems and improving the quality of life for all.

#### **Community Benefactors**

*(Minimum pledge of \$1,000 per year for three consecutive years)*

Emerson Power Transmission  
George P. Ferrari, Jr. and Daniel R. Hirtler  
Robert and Barbara Foote  
George B. Bailey Agency  
Cornell University  
Jean and Carl Gortzig  
Brad and Mary Grainger  
Howard P. Hartnett  
John and Robin Moss Hinchcliff  
David Holmberg and Kathryn March  
Lansing Funeral Home  
M & T Charitable Foundation  
Daniel Mansoor and Joyce Rothschild  
Miller Mayer, LLP  
Money with a Mission/ FAFN  
Murphy–Ainslie Group  
The Ridenour Family Fund  
Helen M. Saunders  
Robert J. and Pamela B. Swieringa  
Bruce and Katie Thompson  
Sandy and Jay True  
Eugene and Jeanne Yarussi

#### **Community Sponsors**

*(Minimum pledge of \$500 per year for three consecutive years)*

Wendy Bakal and Augie Stagliano  
Mary Pat Dolan and David Kerness  
Eagle Envelope Co.  
Greg Garvan and Priscilla Quirk  
Dr. and Mrs. Robert L. Harris, Jr.  
Risa M. Mish  
Susanne Morgan  
Taylor Peck  
Dick and Diane Shafer







## Women's Fund Grant Patrons

Women's Fund grant patrons have pledged a multiyear commitment to support the current grant-making priorities of the Women's Fund. The generous support of these community leaders enable the Women's Fund to grow at the same time that immediate needs are addressed with annual grants wholly supported by these patrons.

Beverly Baker

Eugenia Barnaba

*Gift in honor of Beverly Baker*

Mary G. Call

Barbara DeWall

*Gift in memory of Lois DeWall*

Blumkin & Finlay

Jean Gortzig

Carl Gortzig

Holmberg, Galbraith, VanHouten & Miller

Patti Jacobson

Joanne James

LoPinto, Schlather, Geldenhuys & Salk

*Gift in memory of Laura Holmberg*

Nina K. Miller

*Gift in memory of Rose Kaplan*

Susanne Morgan

Helen Saunders

Lynette Scofield

*Gift in honor of Beverly Baker*

Sally True

Anonymous

## Community Donors

Rebecca Abraham

*Gift in honor of Robin Moss Hinchcliff*

Kraig and Dolores Adler\*

Margaret Albrecht

Irene and Lee Alexander

Susan Aljoe\*

*Gift in memory of Erin Aljoe Schlather*

Theresa and Mark Allen

Dorothy L. Allen

Richard Allen and Anke Wessels\*

Thomas Allred

*Gift in memory of Edith W. Showacre*

Alternatives Federal Credit Union\*

Katherine Anderson and Max Pensky\*

Alex and Janet Aneshansley\*

Patricia Ard\*

Doug and Laurie Arnold\*

Margaret Arnold

Robert Aronson\*

*\*Denotes donors who have given in multiple years*



Paul and Velma Avveduti  
 Timothy Babcock  
 John Bailey\*  
 The George B. Bailey Agency\*  
 Wendy Bakal and Augie Stagliano\*  
 Beverly Baker\*  
   *Gifts to the Foundation*  
   *Gift in memory of Edith W. Showacre*  
   *Gift in memory of Bernetta Cronk*  
 Rosella Baker  
 David Barbano  
 Eugenia Barnaba  
 Amy Baron  
 Philip and Dorothy Bartlett  
   *Gift in memory of Edith W. Showacre*  
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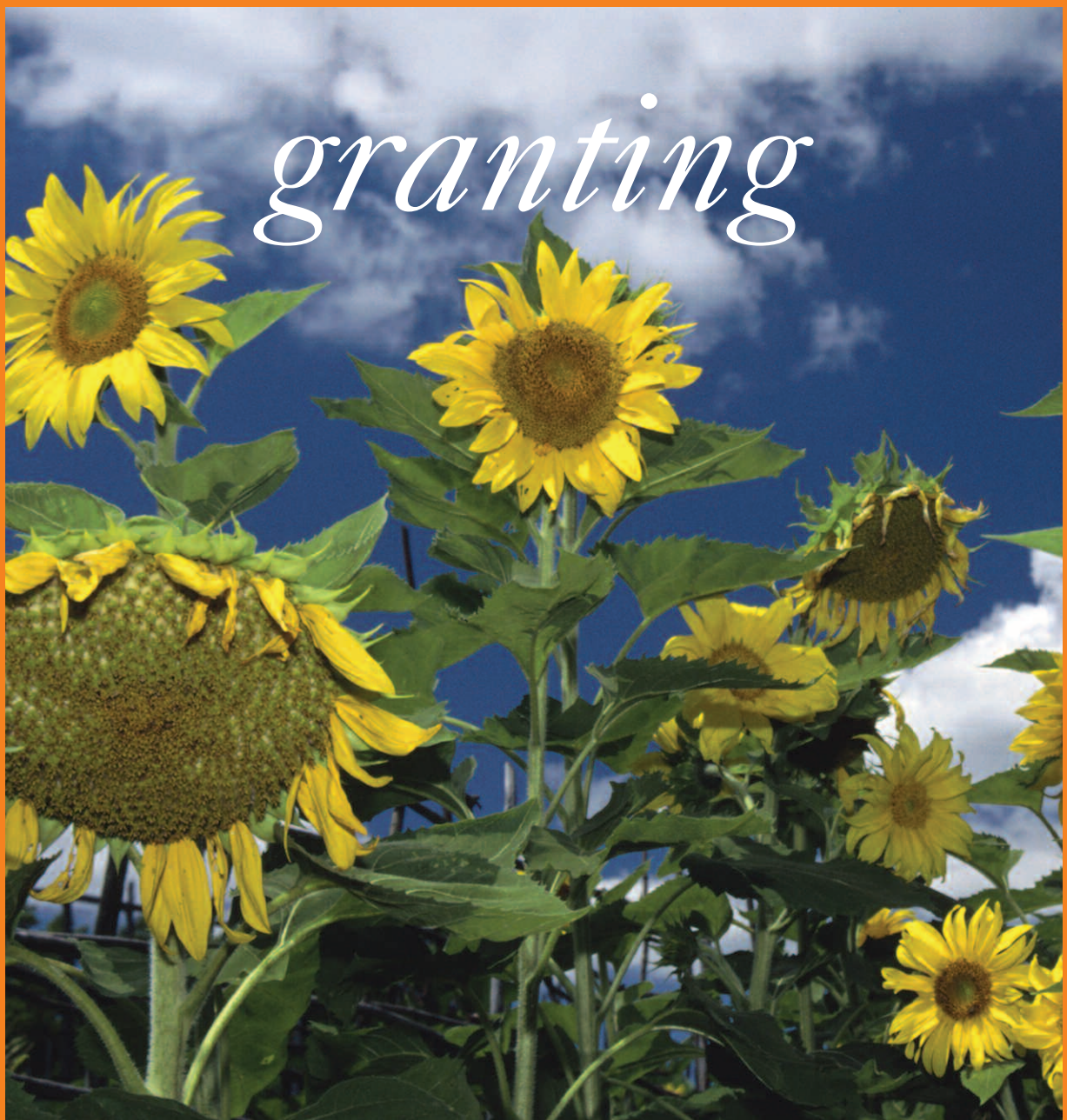
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Every effort has been made to provide accurate information. The Community Foundation of Tompkins County sincerely apologizes for any errors or omissions. Please contact our office with revisions.



\* Denotes donors who have given in multiple years



## *Granting for Community Youth*

All young people flourish when they understand that our community values and trusts them to guide their own development with the support and encouragement of compassionate adults. A grant for youth programs at GIAC represents the intersection of community needs, Howland Foundation priorities, and solutions recommended at the Community Foundation's Critical Issues Roundtable with young people. We have learned from young people what can happen when they do not have a sense of belonging, when they lack safe, fun activities and a place to be. The GIAC Friday Night Youth Program is one way of beginning to address this vital community need. It also restores a program that had been cut due to loss of other funding. This grant is an example of how the Community Foundation collaborates with other funders: the project also received support from the Tompkins County

Foundation, a local private foundation, as both foundations coordinated responses to the multiple requests for support.



*“On behalf of our community’s teens, I would like to express our deep gratitude for the generosity*

*of the Howland Foundation, the Community Foundation, and the Tompkins County Foundation in funding the Friday Night Program at GIAC....I appreciate the commitment that each of the foundations has made to understanding and meeting the needs of our teens. The Friday Night Program will address one of the needs identified by teens, having a late-night social gathering place with a variety of programs and activities.”* —MARCIA FORT, EXECUTIVE DIRECTOR, GREATER ITHACA ACTIVITIES CENTER (GIAC)





## *Collaborative Granting to Enhance Planning*

The Human Services Coalition's (HSC) mission is to enhance the effectiveness and efficiency of nonprofits by providing technical assistance to and advocacy for Tompkins County agencies, funders, and policy makers. The Cornell Cooperative Extension of Tompkins County's (CCETC) mission is to strengthen youth, adults, families, and communities through learning partnerships that put knowledge to work.

HSC knew that funding opportunities were being missed due to the increasingly complex nature of the applications. The ability to quickly coordinate the response to these opportunities could bring needed resources into the community.



At the same time, CCETC was having great success with programs it developed to strengthen its internal operations and knew that they could share these models with other nonprofit organizations.

They sought to create a position and resources that would provide grants coordination and in-house technical assistance training for the entire non-profit community of Tompkins County. After receiving partial support from Tompkins County government, HSC and CCETC approached the Tompkins

County Funders Group with an idea to close the gap. The Community Foundation was one of the local funders who recognized the wisdom of providing grant support for this smart idea that advanced collaboration and increased efficiency to better serve people in need. This grant represents a joint collaborative funding from the various philanthropic entities, both public and private, in our community.

*“When organizational needs go unmet, service delivery is hampered and an agency’s ability to accomplish its mission is jeopardized. This collaboration is a perfect example of how local nonprofits and funders working together can impact community needs far more effectively than any one entity could do individually.”*

—KATHY SCHLATHER, EXECUTIVE DIRECTOR, HUMAN SERVICES COALITION OF TOMPKINS COUNTY



## *Granting for Basic Needs*

The Women's Fund was established as one of the first Field of Interest Funds within the Community Foundation of Tompkins County. The Women's Fund Advisory Committee is the first group of volunteers formed to advance a Field of Interest Fund.

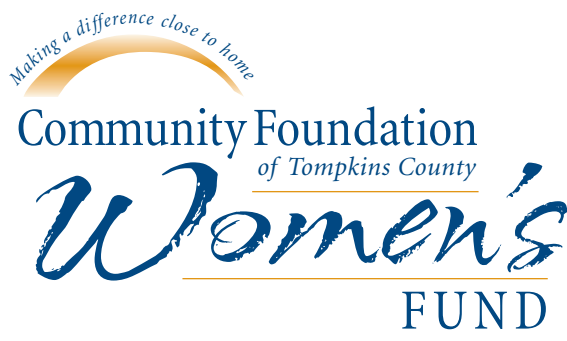
The 2006 Women's Fund grant award was made to the Samaritan Center of Catholic Charities to meet immediate financial needs of women and children who have exhausted all other means of securing housing, prescription assistance, or transportation to find or maintain employment.

The second Laura Holmberg Award, instituted to honor women who, in addition to excelling in their own work, have selflessly and voluntarily contributed time, talents, and skills in ways that promote the well-being of women in our community, was presented to Joan Ormondroyd, a tireless advocate of reading and libraries.



*“Our wish was to present several grants or scholarships each year. We are so pleased that through an advisory committee challenge, several women stepped forward to underwrite our needs for a minimum three-year period, thus allowing our fund to grow.”*

—BEVERLY BAKER, COMMUNITY LEADER  
AND WOMEN'S FUND ADVISORY  
COMMITTEE MEMBER



## *Facilitating Grants Since 2000*

The Community Foundation makes grants from our Tompkins Today and Tomorrow Fund to both address emerging needs and support proven practices which deliver specific outcomes to improve the quality of life in our community. We evaluate the grants made to make certain we achieve the desired effects. Grant making is a way to both invest in established strategies and try out new approaches for solving problems and improving our community.

Community Foundation grants support the arts, build civic engagement, enrich education, protect the environment, advance health, and serve those in need. We make grants to promote capacity, further performance, and enhance the accountability of service providers in our community's robust nonprofit sector.

The Community Foundation also makes grants through Donor Advised Funds. Grants from our donor advised funds provide local philanthropists—individuals or community groups—with opportunities to advise us about charitable needs. Through these funds, the Community Foundation enlarges charitable capacity and enhances the effectiveness of giving.

The Community Foundation serves as a local grant administration and decision-making agent for other foundations. By partnering with other foundations, we seek to encourage philanthropic alliances that expand the resources available to benefit Tompkins County residents.

Overseeing the grants process is the Grants Committee which maintains an intimate knowledge of the county as it draws from a diverse membership and analyzes current needs.

The Community Foundation seeks to constantly better understand opportunities and interventions to guide our grant making and to share our learning with donors and the community.



## Grant Awards

From Community Foundation Inception August 1, 2000 through July 31, 2006

AREA	AMOUNT GRANTED	% TOTAL GRANT \$
Arts and Culture	\$172,930	13%
Environment and Sustainability	\$49,309	4%
Education	\$133,842	11%
Health and Human Services	\$779,072	61%
Community Building	\$135,255	11%
Total	\$1,270,408	

*Since August 2000, the Community Foundation has facilitated over 400 grants.*



## *Women's Fund*

The purpose of the Women's Fund is two-fold: (1) to provide support for the empowerment, education, creativity, and transformation of women; and (2) to provide a venue for honoring women as philanthropists and leaders, whose lives and work have made substantial contributions and critical differences to their community. This fund recognizes the important culture of giving by women—determined not by economic means but by a desire to aid others and to create a community where needs are addressed. The Women's Fund of the Community Foundation has ambitious plans for assisting women and girls. The Advisory Committee of the Women's Fund is composed of many generous and skilled women with energy, enthusiasm, and élan. Contributions into the fund are set aside and invested so that the fund grows under the Community Foundation's prudent investment strategies. At the same time, the Advisory Committee sees the wisdom of making strategic grants now to have an immediate impact from grant patron support.

## *2006 Helen Thomas Howland Grants*

### ***Facilitated by the Community Foundation of Tompkins County***

The Community Foundation of Tompkins County is pleased to partner with the Helen Thomas Howland Foundation. Helen Thomas Howland was a native of Binghamton and spent much of her life in Ithaca. A trust was established in her will to support grants in both Tompkins and Broome Counties. Priority areas for Howland Foundation grants are Aging, Animal Welfare, Youth, and the Environment. Grants are limited to qualified nonprofit organizations serving these priorities. Grants fund operational, capital, and special project needs. The Howland Foundation favors organizations that demonstrate long-range planning rather than crisis management.

#### **FOR AGING SERVICES**

Beechtree Center, the former Reconstruction Home, for its Mary Hibbard Rehabilitation Wing

#### **FOR ANIMAL WELFARE**

Broome County Humane Society for the Restoring the Dream project

#### **FOR YOUTH SERVICES**

Greater Ithaca Activities Center for the Friday Night Youth program

Vitamin L Project for the Sliding Scale Scholarship program

Temunchin Skate Fund for the Ithaca Skate Park Renovation

Village Camp Fund for the Earth Connections program

#### **FOR ENVIRONMENTAL PROGRAMMING**

Cayuga Nature Center for the Cayuga Waterways project

#### ***Multiple Priority Areas***

##### **FOR AGING SERVICES AND ANIMAL WELFARE**

Binghamton University, Decker School of Nursing for the Pet Net program

##### **FOR YOUTH SERVICES AND ENVIRONMENTAL PROGRAMMING**

Community Science Institute for Watershed Youth Partnerships

Ithaca Children's Garden for a footbridge



*An additional \$10,000 was disbursed by the Howland Foundation to the Tompkins County Society for Prevention of Cruelty to Animals as part of a five-year pledge.*



## Grant Recipients

August 1, 2005 through July 31, 2006

Between August 1, 2005 and July 31, 2006, the Community Foundation distributed 125 grants to 72 organizations totaling \$310,778 from Donor Advised Funds.

### Donor Advised Funds

Acumen Fund, Inc.  
The Advocacy Center of Tompkins County  
American Association of Family and Consumer Sciences  
American Red Cross, Tompkins County Chapter  
Amnesty International USA  
Amnesty International—Group 73  
Audubon Society  
Better Housing for Tompkins County, Inc.  
Boy Scouts—Baden Powell Council  
California State University, Long Beach  
Catholic Charities of Tompkins County  
Catholic Community at Ithaca College  
Cayuga Addiction Recovery Services  
Cayuga Medical Center Foundation  
Cayuga Waterfront Trail  
Center for Religion, Ethics and Social Policy  
Northern Lights Learning Center  
Ithaca World Arts Alliance  
Committee on U.S./Latin American Relations (CUSLAR)  
Community Dispute Resolution Center, Inc. (CDRC)  
Community Science Institute  
Cornell Lab of Ornithology  
Cornell University Fund  
CRESP/Tompkins County Living Wage Coalition  
Dryden Central School District  
Education Pioneers  
Families and Work Institute  
Family & Children's Service of Ithaca  
Finger Lakes Land Trust, Inc.

First Congregational Church  
Foodnet, Nutrition for the Elderly in Tompkins County  
Grassroots Leadership  
Greater Ithaca Activities Center (GIAC)  
Historic Ithaca  
Hospicare and Palliative Services of Tompkins County  
Immaculate Conception Church  
Iowa State University, College of Human Services  
Ithaca Breast Cancer Alliance  
Ithaca College  
Ithaca Neighborhood Housing  
Ithaca Public Education Initiative  
Lanka Academic Network/Lacnet.org  
Alternative Community School  
Light in Winter Festival, Inc.  
Loaves and Fishes  
Massena Memorial Hospital Fund  
The Nature Conservancy, Central & Western New York Chapter  
Newfield Central School District  
Newfield Public Library  
Nicaraguan Mission Project, Inc.  
NYPIRG  
Ohio Wesleyan University  
Paleontological Research Institution (PRI)  
Planned Parenthood of the Southern Finger Lakes  
Powers Library  
Salvation Army  
Schuyler Health Foundation, Inc.  
Sciencenter  
Social Ventures, Inc.  
SPCA of Tompkins County  
Saint Patrick Roman Catholic Church

Saint Andrew's School  
St. James AME Zion  
Saint Peter and Saint Paul Church  
Tompkins County 4-H Youth Development  
Cortlandville Starr Park and Recreation Center  
Ulysses Philomanthic Library  
Unitarian Church  
United Way of Tompkins County  
University of Vermont  
U.S. RILM Office  
Women's Interfaith Institute in the Finger Lakes



### Tompkins Today and Tomorrow Fund

**The Circle of Recovery** to empower young men of color to grow into positive lifestyles, complete high school, and to be pro-active in their communities through mentoring relationships.

**Human Services Coalition** to enhance collaboration and increase efficiency in nonprofit agencies.

### Crime and Sexual Assault Victims Fund

**The Advocacy Center** to enhance support groups for survivors of rape and child sexual abuse.

**Family and Children's Services** for a promotional campaign of their Crime Victims' Services Program.





### *National Standards Recognition*

In March 2006, the Council on Foundations, a Washington, DC-based nonprofit national membership association of more than 2,000 grantmaking foundations and corporations, recognized the Community Foundation of Tompkins County for achieving full compliance with the National Standards for U.S. Community Foundations. This formal recognition is the result of an extensive year-long process of foundation policy development, document review, and Council evaluation.



The Council on Foundations developed forty-three national standards that provide a framework for internal organizational development and establish a set of benchmarks for

external assessment of community foundation performance.

In order to achieve the Confirmation of Compliance with the National Standards, the Community Foundation of Tompkins County underwent an extensive review in key areas of foundation operations: governance, resource development, stewardship and accountability, grantmaking and community leadership, donor relations, and communications.

*“We are honored to have received this Confirmation of Compliance from the Council on Foundations. We will continue to be guided by the National Standards as we work in partnership with donors and nonprofit organizations to enhance the quality of life in our community. This milestone first-time achievement underscores our ongoing commitment to earning and maintaining the respect of the Tompkins County community and the trust of our donors as an effective facilitator of community-based philanthropy.”*

—DIANE SHAFER, INCORPORATING DIRECTOR AND CURRENT BOARD MEMBER,  
COMMUNITY FOUNDATION OF TOMPKINS COUNTY





## Leadership

We are thrilled to share with you this year of firsts. You have read about our first grant from a bequest, our first regular annual support for unrestricted grant making, our first scholarship grant, and our first \$1 million in grants. We appreciate the advice, encouragement, and support of the community which has enabled us to celebrate these accomplishments.

Our vision takes into account our strengths and challenges, the needs and desires of donors, and the legitimate claims of our community on the resources under our stewardship.



In all of our work, whether it be fund development, grant making, convening, or investing, we use a variety of resources to achieve the ultimate goal of advancing problem solving and building community.

We use **financial resources** such as grants, gifts to the Foundation, investment stewardship, and financial report analysis.

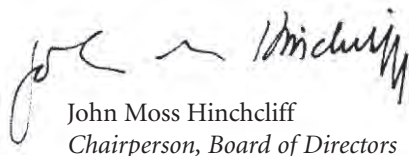
We use **knowledge resources** such as current needs, gaps in available services, best practices known here or imported from elsewhere, outstanding local providers, evaluations, and new thinking about emerging issues.

We use **relationship resources** such as convening community leaders, engaging donors, facilitating provider collaborations, and coordinating with funding partners.

*The Community Foundation of Tompkins County values:*

- innovative service models and proven practices
- involved and informed donors who are empowered to take bold, effective, and efficient philanthropic action
- community leadership, organizational accountability, continuously improving systems, and sound public policy
- openness, transparency, and accessibility
- reasonable risk and conflict on the path to better service and more effective interventions

We invite you to continue on our great work together to grow and nurture this vital asset for our special community.



John Moss Hinchcliff  
Chairperson, Board of Directors



George P. Ferrari, Jr.  
Executive Director



## Board of Directors



**John Bailey**  
Executive Vice President  
George B. Bailey Agency, Inc.



**Howard P. Hartnett**  
Vice President and Regional  
Manager  
M&T Investment Group



**Bill Myers**  
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Alternatives Federal Credit  
Union



**Priscilla (Percy)  
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Community Leader



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Cornell University Office  
of Alumni Affairs and  
Development  
College of Human Ecology



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The Richard J. Schwartz  
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Shared Journeys, Inc.  
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Branch Manager  
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**Mary Pat Dolan**  
Community Leader



**Joanne James**  
Business Administrator  
Newfield Central Schools



**Diane Shafer**  
Community Leader



**Gregory L. Garvan, MS**  
Money with a Mission/FAFN



**John Krout, PhD**  
Gerontology Institute  
Ithaca College



**Tom Torello**  
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Marketing Communications,  
Ithaca College



**Jean Gortzig**  
Cornell University Office  
of Alumni Affairs and  
Development, *retired*



**Risa Mish**  
Individual Giving Officer  
Office of Alumni Affairs &  
Development  
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**Gene Yarussi**  
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Emerson Power Transmission



**Brad Grainger**  
Senior Vice President  
Capmark Finance, Inc.



**Mimi Melegrito-Palmer**  
Kiwanis International

### SERVICE ENDING 2006

**Fernando de Aragon**  
**Eldred Harris**  
**Robert L. Harris, Jr.**  
**Damayanthi (Dammi) Herath**  
**Anne Shelton**

### BOARD EMERITI

**Penny Boynton**  
**Travena L. Byrd**  
**Michael C. Cannon**  
**Francille M. Firebaugh**  
**Mary Beth Gehring**  
**Matthew Green**  
**Janet Hawkes**  
**Margaret A. Hendricks**  
*Board Chair and Executive Director Emerita*  
**Eric Lerner**  
**Ken McClane**  
**Jake Ryan**  
**Vilma Santiago-Irizarry**  
**Neal Stamp#**  
**Carol Terrizzi**  
**Jeffrey B. True**  
*Executive Director Emeritus*  
**Sally True**

### INCORPORATING DIRECTORS

**Jeff Furman**  
**Howard P. Hartnett**  
**William Myers**  
**John Semmler**  
**Diane Shafer**  
**Bob Swieringa**

### STAFF



**George P. Ferrari, Jr.**  
Executive Director  
gferrari@communityfoundationofic.org



**Colleen Crawford Drozd**  
Executive Assistant



**Esther Haney**  
Financial Officer

# deceased

## *Statement of Financial Position*

### **ASSETS**

	AUDITED YEAR ENDED MARCH 31, 2006	AUDITED YEAR ENDED MARCH 31, 2005
Cash and Cash Equivalents	\$ 411,637	\$ 448,696
Unconditional Promises to Give	50,997	774,689
Investments at Market	3,270,342	2,040,706
Other Assets	178,250	170,575
<b>TOTAL ASSETS</b>	<b>\$ 3,911,226</b>	<b>\$ 3,434,666</b>

### **LIABILITIES**

Accounts and Grants Payable	\$ 3,394	\$ 12,138
<b>TOTAL LIABILITIES</b>	<b>3,394</b>	<b>12,138</b>

### **NET ASSETS**

Unrestricted	\$ 149,316	\$ 100,329
Unrestricted-Board Designated	2,928,047	2,420,237
<b>TOTAL UNRESTRICTED NET ASSETS</b>	<b>3,077,363</b>	<b>2,520,566</b>

Temporarily Restricted	92,271	163,997
Permanently Restricted	738,198	737,965
<b>TOTAL NET ASSETS</b>	<b>\$ 3,907,832</b>	<b>\$ 3,422,528</b>

<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 3,911,226</b>	<b>\$ 3,434,666</b>
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## *Statement of Activities*

### **REVENUE**

Contributions/Grants	\$ 812,661	\$ 1,945,356
Investment Income	275,638	51,550
Other	27,313	28,615
<b>TOTAL REVENUE</b>	<b>\$ 1,115,612</b>	<b>\$ 2,025,521</b>

### **EXPENSES**

Grants	\$ 359,383	\$ 249,308
Administration	184,581	160,504
Directed Fund Expenses	86,344	96,904
<b>TOTAL EXPENSES</b>	<b>\$ 630,308</b>	<b>\$ 506,716</b>

<b>CHANGE IN NET ASSETS</b>	<b>\$ 485,304</b>	<b>\$ 1,518,805</b>
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<b>NET ASSETS AT BEGINNING OF YEAR</b>	<b>\$ 3,422,528</b>	<b>\$ 1,903,723</b>
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<b>NET ASSETS AT END OF YEAR</b>	<b>\$ 3,907,832</b>	<b>\$ 3,422,528</b>
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**Writers**

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Nancy K. Bereano

**Editor**

Nancy K. Bereano

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*Making a difference close to home*

# Community Foundation *of Tompkins County*



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