Community Foundation of Tompkins County

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2009 REPORT TO THE COMMUNITY
Celebrating 10 Years
The Community Foundation of Tompkins County is dedicated to work with all people committed to local philanthropy and civic engagement as a means to enhance the quality of life for all who live in, work in, and love 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 WAYS TO MAKE GIVING EASY AND EFFECTIVE
- SERVING AS CATALYST AND CONVENER

**Contents**

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EVEN START

The Community Foundation is skilled at bringing together needs, services, and resources to deliver specific results. By facilitating a connection between Cornell’s Kappa Kappa Gamma sorority and TST-BOCES, a designated gift of $25,000 generated a grant to preserve the Even Start program in Newfield and Groton.

For the past 16 years, TST-BOCES Even Start Family Literacy Program has provided an integrated program of early childhood and parenting education to low income, low literacy families in our rural communities. The program helps to break the cycle of poverty and illiteracy by guiding adults to set goals and obtain education and employment, at the same time as they take on the crucial role of becoming their own children’s first teachers. TST-BOCES Even Start has consistently met or exceeded New York State performance indicator targets, but was in danger of having to eliminate sites for the 2009-2010 year if new funding was not secured to replace the loss of New York State funding.

This preservation grant was made after Community Foundation consultation with the leadership of Cornell’s Kappa Kappa Gamma sorority who were seeking opportunities to make a philanthropic investment in the area of literacy and education. By linking Kappa Kappa Gamma’s interests with the Community Foundation’s Children and Youth Fund, valuable resources were supplied to preserve a proven program.

“We chose to partner with the Community Foundation because they served as an invaluable informational resource when we found ourselves in a unique situation to make a difference in our local community. We wanted to be informed and effective with our philanthropy and the Community Foundation helped us to do this through the Children and Youth Fund. We know this grant is going to help local children and families with literacy education and we’re really happy we could be a part of it.”

—THE WOMEN OF KAPPA KAPPA GAMMA AT CORNELL UNIVERSITY

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Donors  Multi-Year  January 1, 2009 — December 31, 2009

Community Sustainers
(Pledge of $2,000 or more per year for three consecutive years)
Anonymous
Percy Browning
Thomas and Constance Bruce

Community Benefactors
(Pledge of $1,000 per year for three consecutive years)
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George P. Ferrari, Jr. and Daniel R. Hirtler
Jean and Carl Gortzig
Howard Hartnett
John and Robin Moss-Hinchcliff
Joanne James
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Michelle Sanders-Jauquet and Mark Jauquet
Robert and Pamela Swieringa
Katie and Bruce Thompson

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Shelley and John Semmler
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David Squires and Rachel Lampert

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Linda Hoffmann
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Susan Johnston
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Lynnette M. Scofield
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Women’s Fund Endowment Founders
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in honor of Beverly Baker
Anonymous
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Priscilla Crispell
Lauren Comly
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in honor of Beverly Baker
Maria Cristina Garcia
Carl Gortzig
in honor of Jean L. Gortzig
Jean Livingstone Gortzig
in honor of Margaret J. Thomas
Mary Grainger
in honor of Aileen Grainger, Maura Grainger, and Erin Grainger

John and Robin Moss Hinchcliff
in memory of Hope Moss and in honor of Rebecca Abraham, Abigail Hinchcliff, Emily Hinchcliff, and Katharine Hinchcliff
The Holmberg Family
in memory of Laura Holmberg
Martha Hsu
Barbara Hulbert
in memory of Cara M. Tarantine and Jo A. Tarantine
Joanne James
in honor of Florence Emery
Alfred and Mary Kahn
in memory of Laura Holmberg
Carol Kammen
David J. Kuckuk
in honor of Sheila Danko and Jane Wiley Kuckuk; in memory of Veronica Danko, Janette Mount Wiley, and Marion Cameron Kuckuk
Frederick Laub
in memory of Katherine Z. Heasley and Lydia P. Laub
Karen Macier
Susanne Morgan
in honor of Helen Saunders
Susan Murphy
Elizabeth Elliott Reed
Helén M. Saunders
Carol Scheele
Caitlin Schryver
Lynnette Scofield
Jeanette Shady
in honor of Sarah Ridenour
Diane Shafer
Rachel Siegel
Robert Sprole II
in memory of Lila P. Sprole
Carol Travis
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in honor of Nan True
Thomas C. Weiler
in memory of Celia K. Weiler
Jeanne and Gene Yarussi
Mary and John Ziegler

Social Justice Fund Patrons
John Rogers
Mark and Deirdre Silverman
Don Lifton

Social Justice Fund Endowment Founder
Don Lifton
As local cultural treasure, the Kitchen Theatre heads towards its 20th season, generous supporters and dedicated community efforts are underway to create the theater’s new permanent home in Ithaca’s West End. A grant from the Community Foundation’s Kitchen Theatre Fund enhanced staffing as the theatre continued to operate during the busy time of planning and constructing the new space, which combines increased performance, rehearsal, and office space under one roof. The new home at 417 Martin Luther King Jr. Street/W. State Street will lower expenses and open possibilities for a streamlined operation and increased audiences. These advantages will lead the Kitchen to a secure, strong, and sustainable future. The new space establishes the Kitchen Theatre as a permanent mainstay on the cultural landscape of our community.

“Cherish forever what makes you unique, ‘cuz you’re really a yawn if it goes.” —BETTE MIDLER
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Jay and Sherri Dunham*
David and Peggy Dunlop*
Daniel and Debra Dwyer*
Hugh Egan and Deborah Homsher*
ITHACA FREE CLINIC

A community foundation provides local resources directed by residents designed for a place’s unique way of solving problems. Access to health care is a long term and very current issue of great concern to many in the United States. Locally a number of Ithacans have developed a nationally renowned model expanding service to those of our neighbors and friends most vulnerable by launching the Ithaca Health Alliance’s Free Clinic. Community Foundation grants have assisted in physical plant renovations, expanded pediatric and ob-gyn care, secured equipment, and increased access by supporting diagnostic procedures and provider-malpractice insurance. Grants have been made from the Women’s Fund, the Howland Foundation process, and donor advised funds.

“As free citizens in a political democracy, we have a responsibility to be interested and involved in the affairs of the human community, be it at the local or the global level.” — PAUL WELLSTONE
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Elizabeth R. Elgie*
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Robert and Elaine Engel
Gift in the name of Paul Strebel
Gift in the name of Philip Engel
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Mr. and Mrs. David Fontanella*
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Gift in memory of Erin Aljoe Schlather
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Janet and Gerard Hawkes*
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Roald Hoffmann*
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David Holmberg and Kathryn March*
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Ted and Joan Hullar*
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Gift in memory of Erin Aljoe Schlather
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Patti Jacobson*
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James John*
Sarah L. Johnson*
Susan Johnston
Deborah Jones*
Elliott Kadar
Alfred and Mary Kahn
in memory of Laura Holmberg
Carol and Michael Kammen*
Mary Kane
Steven Kelling and Susan Pearce Kelling*
Bill Kellner and Camille Tischler*
Adam Klauser and Meredith McCleod*
John and Bobbi Krout*
Rachel Lampert
Bruce R. Lane*
Frederick Laub
in memory of Katherine Z. Heasley and Lydia P. Laub
Joelle Laszlo*
Gift in memory of Erin Aljoe Schlather
Peter Lepage and Deborah O’Connor*
William Lesser and Susan Bailey Lesser*
Gift in memory of Erin Aljoe Schlather
Diana Levy
Don Lifton*
Laurie Linn*
Kathleen E. Loehr*
Gift in memory of Erin Aljoe Schlather
Christopher J. Lowe*
M&T Bank Charitable Foundation*
Karen Macier*

donors  gifts  funds  grants
LISTENING LEARNING

The Community Foundation, in partnership with AFCLU, BOCES, CAP (Community Arts Partnership), HSC (Human Services Coalition), and Sustainable Tompkins embarked on a Listening Learning Tour in 2009. The primary purpose was to open an ongoing line of communication with various nonprofit organizations related to their current economic challenges and future strategic planning.

The Community Foundation had interesting and frank discussions with groups of nonprofits in the arts, environment, education, human services and community building. We heard about frustrations, we heard about possibilities, we heard about dreams but most of all we heard from people who really care about this community.

The rich data collected helped to inform our grant making. We also shared the results to assist donor advisors in their consideration of grant nominations for community needs.

“How do we expand our impact and reach?”
within the confines of space and budget
— LISTENING LEARNING PARTICIPANT

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Linda Madeo
Robin Abrahamson Masson
Ann C. Mathews*
Gift in memory of Barbara Caldwell
Denise Mauldin*
Gift in honor of Anna Holmberg and The Holmberg Family
Mildred Mauldin
Gift in honor of The Holmberg Family

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Judith Pratt and Tom Bruce*  
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PSI Deuteron Chapter of Kappa Kappa Gamma  
Elizabeth Elliott Reed  
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Katheleen Reidy*  
Gift in memory of Erin Aljoe Schlather  
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Gift in memory of Erin Aljoe Schlather  
Raymond and Kathy Schlather*  
Gift in memory of Erin Aljoe Schlather  
Schlather, Stumbar, Parks & Salk*  
Caitlin and Tom Schryver*  
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Gift in memory of Erin Schlather  
Mr. and Mrs. Stuart Shapiro*  
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Sandy Sherwood and Louis Gatto  
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Mark and Deirdre Silverman*  
Robert Slocum*  
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Therm, Inc.*  
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Tioga State Bank*  
Tompkins Charitable Gift Fund*  
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Gift in honor of Jean Gortzig  
David Tyler  
George Ufford*  
Gift in memory of Glen Wilder  
United Way of Tompkins County*  
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Mary and John Ziegler*  
Jane Zimmer*  
Patricia Zimmermann and Stewart Auyash  

* Denotes donor who has given over multiple years  

Every effort has been made to provide accurate information. The Community Foundation sincerely apologizes for any errors or omissions. Please contact our office with revisions.
The Legacy Society of the Community Foundation

The Legacy Society honors and assists individuals who wish to perpetually benefit the communities and organizations of Tompkins County by establishing planned gifts with the Community Foundation. 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 bequest intentions in a will, life income agreements, trusts, flexible endowments, real estate with retained life use, retirement plans, and life insurance.

By making a planned gift and joining the Legacy Society, donors help to catalyze change and fund innovative and lasting solutions to the region’s most challenging problems.

Gifts may be made to the Tompkins Today and Tomorrow Fund, a permanent charitable resource that grows and provides much-needed funding to local nonprofit organizations. When a planned gift is designated as an endowment, the donor helps to ensure that the Community Foundation can meet the needs that we know will exist into our community’s future. The Tompkins Today and Tomorrow Fund is, in effect, a savings account protecting and serving the needs of our region. These needs can be addressed by annual grant making programs to provide funding for local charitable agencies, or by special initiatives in response to specific needs.

With the Legacy Society and the Tompkins Today and Tomorrow Fund, anyone can be a philanthropist. There is no minimum requirement on gifts. Donations can be made in cash, stock, real estate, or through many other types of assets.

Planned gifts may also be directed to a specific Field of Interest Fund, such as the Women’s Fund or the Social Justice Fund. And planned gifts may be used to add to or to create a Donor Advised Fund, in which the donor or donor’s surviving family members may act as advisors in recommending where and when grants are made.

If you would like to explore the many options for you and your family of including the Community Foundation in your plans we encourage you to contact us. We would be glad to assist you and your professional advisor on a confidential basis and without any obligation.

If you have already made a planned gift and have not yet informed us, we invite you to share this information with us. Legacy Society members are acknowledged, according to their individual wishes, either by name or anonymously. We recognize their generosity and faith in the Community Foundation with deep gratitude.

Legacy Society Members

Anonymous (2)  Beverly Baker  Sara E. Blackwell*  Barbara DeWall  Marie Gast  Jean and Carl Gortzig  Maureen Rebecca Hanson  Howard P. Hartnett  Beth Jenkins  Sarah L. Johnson  William and Carol Klepack  Vally Kovary  Mary Larkin  Jemma Macera  Susanne M. Morgan  Suzanne Motheral  Robert Riter  Bernard C. Rosen*  Caroline and Jeffrey Rusten  Helen M. Saunders  Carol Scheele  Mack and Carol Travis  Bruce and Martha Turnbull  Thomas Weiler  *deceased
In 2009, Community Foundation received the single largest gift to date in our 10 year history. This gift of more than $2 million comes from Dr. Bernard Rosen, a member of the Community Foundation’s Legacy Society, who made a bequest in his will to give the bulk of his estate to the Community Foundation. Dr. Rosen, a professor at Cornell University since 1966, emeritus since 1993, died on November 9, 2009, ending a long and distinguished career in sociology. He was preceded in death by his wife Shirley in November 2007. In 2003 and 2004, Dr. and Mrs. Rosen consulted with their legal advisors and created an estate plan which included a philanthropic bequest.

This gift creates the **Bernard Carl and Shirley Rosen Library Fund** of the Community Foundation which is perpetually dedicated to the importance of the good work of the 33 libraries in the Finger Lakes Library System. It will generate grants totaling approximately $80,000 to $100,000 annually in five counties across Central New York.

Dr. Rosen documented his desire for the fund with specific language in his will. “The mission I intend for the Fund is to promote genuine intellectual curiosity and a lifelong love of reading and learning.” The specific purpose of the **Bernard Carl and Shirley Rosen Library Fund** is “to promote greater and easier access by youth to local libraries.”

Grants are desired that “allow or encourage teens to visit, study, and read in a library during evening or weekend hours,” or “grants to smaller, more rural libraries that enable access to books, reference materials or other resources that might otherwise be unavailable in the community.” Grants are not to be “used to replace existing library revenues but to supplement and enhance current resources” nor should the grants “promote a political agenda.” Grants are not to be used for “bricks and mortar.”

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**“The only wealth which you will keep forever is the wealth you have given away.”**

—MARCUS AURELIUS

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Types of Gifts

The Community Foundation specializes in helping donors develop customized philanthropic action plans for a broad range of assets, using a variety of giving tools.

Please contact us if you would like to explore the many possible ways of structuring a gift for maximum benefit. The Community Foundation of Tompkins County recommends that all charitable giving plans be discussed with your professional advisor.

GIFTS OF CASH We gladly accept gifts of cash, in the form of checks, to support our Tompkins Today and Tomorrow Fund, Field of Interest Funds, or to establish or to grow a Donor Advised Fund.

GIFTS OF SECURITIES Stocks or bonds that are now worth more than when you bought them, or were given them, can also be used to make a gift. In addition to potential income tax deduction benefits, you also may reduce or eliminate capital gains tax on the appreciated value of the securities.

GIFT OF IRA ACCOUNTS OR OTHER 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, we can keep the policy in force with eventual benefit to support the work of the Community Foundation.

GIFTS OF REAL ESTATE You can make a gift of real estate and upon sale the net proceeds are available to the Community 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 giving 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 will consider each gift of property of this type on a case-by-case basis.

GIFTS OF CLOSELY-HELD SECURITIES A gift of closely-held securities can be an effective strategy to transfer ownership of your business while resulting in potential tax benefits. Again, given the unique issues involved in closely-held businesses, the Foundation's board of directors will consider each gift of this type on a case-by-case basis.

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’s board of directors can continue to administer the fund to support the purposes for which the private or family foundation was formed.
S.T.A.M.P.

Southern Tier Advocacy & Mitigation Project, Incorporated (S.T.A.M.P.) is an all-volunteer, not-for-profit, Ithaca-based community organization that challenges pollution, criminalization, exploitation, and incarceration.

S.T.A.M.P. achieves success by encouraging self-respect, empowerment, leadership, and self-determination among young people, adults, and families most affected by criminal justice and environmental policies. This unique organization reflects the local values of combining social justice, community organizing, and environmental activism in order to develop critical thinking capabilities in those most underserved by traditional education.

S.T.A.M.P.’s request for its Green Guerillas Youth Media Tech Collective resulted in a grant from an anonymous fund at the Community Foundation. Green Guerillas study documentary and narrative filmmaking; make their own media from posters to movies; do outreach at community events; and advocate for equitable living and learning environments. They travel beyond Tompkins County to meet peers and share their work.

Through stories underrepresented in mainstream environmental movements, Green Guerillas actively assert a rarely heard or respected local voice into the global conversation with confidence in their ability to define themselves and their futures.

“We have to deal with where we are. We have to create cooperatives, we have to create intentional communities, we have to work for local cooperation where we are.” —JERRY BROWN

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Funds Serving You and Your Community

The Community Foundation takes seriously the responsibility and honor to be the steward of resources entrusted to us. Donations which create new funds and grow current funds improve quality of life and solve problems now and in perpetuity.

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

Each type of Community Foundation fund may be permanently named for an individual, a family, an organization or a business. Naming a fund creates a lasting tribute to the values and passions of those honored or memorialized.

FUND TYPES

TOMPKINS TODAY AND TOMORROW FUNDS are the most flexible and powerful type of funds enabling the Community Foundation to make initiating and responsive grants to address problems, convene community conversations on emerging needs and build collaborations to solve long standing challenges. These unrestricted gifts support the Community Foundation’s role to improve the quality of life in our community in the areas of arts, education, the environment, health and human services and community building.

FIELD OF INTEREST FUNDS include defined areas of interest such as: the Women’s Fund, the Social Justice Fund, and for areas such as Children and Youth, Health and Human Services, the Environment, Arts and Culture, and Sustainable Communities.

DONOR ADVISED FUNDS (DAFs) enable donors to establish a fund and to make grant nominations to be considered for charitable giving in Tompkins County and elsewhere for a wide variety of interests. Donors may be individuals/families, nonprofit or for-profit corporations, or an unincorporated group of community members. 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 direct 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 beneficiaries of these funds do need to be identified at the time of fund creation and remain fixed.

FUND STATUS

Donors may select the status of any fund type to be either ENDOWED or NON-ENDOWED.

ENDOWED FUNDS represent the sustainable and permanent base of support for the Community Foundation in which gifts are reserved to ensure that the Foundation’s work thrives in perpetuity.

NON-ENDOWED FUNDS enable donors to actively participate in shorter term grant making.

All funds are assets of the Community Foundation. All grants from any fund are reviewed by staff to ensure legal eligibility and final action is determined by of the Community Foundation Board of Directors. All gifts to the Community Foundation are tax deductible to the extent allowed by law.
Funds of the Community Foundation of Tompkins County in 2009

The Tompkins Today and Tomorrow Fund
Supports the unrestricted grant making and operations of the Community Foundation of Tompkins County.

NEW FUNDS: ESTABLISHED JANUARY 1, 2009–DECEMBER 31, 2009

Bernard Carl and Shirley Rosen Library Fund
Established with a most generous gift from the estate of Bernard Rosen to promote genuine intellectual curiosity and a lifelong love of reading and learning and to promote greater and easier access by youth to libraries in the Finger Lakes Library System.

Bunny’s Medical Education and Health Care Fund
Created in memory of Bunny O’Brien Schassburger, a consummate nurse practitioner to enhance the continuing professional education and training of medical personnel, as well as facilitate communication and understanding between medical professionals, aspiring health care providers, patients and their families/care givers and to help provide enhanced quality of life for those undergoing therapy and end-of-life care.

A New Anonymous Fund

21 Goodwill Street Fund
Arts & Culture Fund
Alex Haley Pool Fund
Betty J. McKnight and Jean C. Smith, M.D, Environmental Education Fund
Cascadilla Boat Club Fund
Children and Youth Fund
Community Dispute Resolution Center (CDRC) “Talk Works” Fund
Crime and Sexual Assault Victims Fund
David Kuckuk and Sheila Danko Fund
Dryden Youth Opportunity Fund
Erin Aljoe Schlather Dedicated Memorial Fund
Family & Children’s Service of Ithaca Fund
Finger Lakes Land Trust Stewardship Fund
Friends of the Lansing Community Library Fund
Glenn B. Wilder Fund for Peace & Justice
Groton Education Fund
Home Learners of the Finger Lakes Fund
Ithaca Community Chorus Fund
Ithaca Health Alliance Education and Outreach Fund
Ithaca Health Alliance General Fund
James E. Lawrence Environmental Fund
Johnson Graduate School of Management Community Impact Fund
Kitchen Theater Fund
Lenore Coral Fund
Light in Winter Festival Fund
Louis Perlmuter Memorial Fund
Mansoor Family Fund
Many Hands: Peter D. Wadach Memorial Fund
Museum of the Earth at Paleontological Research Institute (PRI) Fund
Myrtle Dee Nash Memorial Fund
Newfield Central School Fund
North American Rock Garden Society—Adirondacks Chapter (NARGS) Fund
Paul D. Tate Fund
Reverend David N. Gramke Community Fund
Satya P. and Chandra Talpade Mohanty Progressive Fund
Social Justice Fund
Strebel Fund for Community Enrichment
Taylor Peck Fund
The Advocacy Center Fund
The Browning Fund
The Carman and Sandra Brink Hill Fund
The Dorothy L. Allen Black Gospel Music Fund
The Edith W. Showacre Memorial Fund
The George B. Bailey Agency Fund
The Hartnett Fund
The Hinchcliff Bailey Agency Fund
The Joe Daley Community Fund
The Lane Family Fund
The League of Women Voters of Tompkins County Education Fund
The Lynnette Molesky Scofield Fund
The Miller Mayer Fund
The Newfield Public Library—Lawrence E. and Lillian C. Payne Memorial Fund
The Q-G Fund
The Ridenour Family Fund
The Sandy and Jay True Fund
The Schlather, Stumbar, Parks and Salk Fund
The Shelley and John Semmler Fund
The Ujeni Grants for Advancing Public Education Fund
The Yarussi Family Fund
Tom and Maria’s Butterfly Fund
Tompkins County Quality of Life Fund
True Insurance Community Fund
TST Enrichment Opportunities Fund
White Family Fund
Wilcox Press Donation Fund
Women’s Fund
Anonymous

At the request of donors, several funds have not been listed in this report.

Anyone may contribute gifts to any fund.
Grantees January 1, 2009 — December 31, 2009

Alternatives Venture Fund
American Red Cross, Tompkins County Chapter
Amnesty International USA
Amnesty International-Group 73
Bethel Grove Bible Church
Better Housing for Tompkins County, Inc.
California State University, Long Beach Cancer Resource Center of the Finger Lakes
Catholic Charities of Tompkins/Tioga
Cayuga Chamber Orchestra
Cayuga Medical Center Foundation
Cayuga Vocal Ensemble
Center for Immigrant Families Center for Transformative Action (formerly CRESP)
Child Development Council of Tompkins County City of Ithaca—Police Department Community Dispute Resolution Center, Inc.
Salvation Army of Tompkins County Social Ventures, Inc
South Seneca Central School District Southern Tier Advocacy & Mitigation Project, Incorporated The Southworth Library Association SPCA of Tompkins County St. Bernard Project St. Andrew’s School St. Luke Lutheran Church Sustainable Economic & Educational Development Society (SEEDS) TC3 Foundation Tompkins Charitable Gift Fund Tompkins County Department of Administration Tompkins County Public Library Tompkins County Public Library Foundation Trumansburg Central Schools TST BOCES TST BOCES Community School Ulysses Philomathic Library United Way of Tompkins County University of Vermont US-RILM Office Village at Ithaca Western Pennsylvania Conservancy Women’s Opportunity Center YMCA of Ithaca and Tompkins County Znet/Zmag/Institute for Social and Cultural Communications
For the year from January 1 to December 31, 2009, the Community Foundation partnered with donor advisors and service providers to focus $395,481 for specific purposes in 131 individual grants.

### Analysis of Community Foundation Grants: January 1–December 31, 2009

**Total Funds Granted:** $395,481  
**Number of Grants:** 131

<table>
<thead>
<tr>
<th>Community Foundation Grants</th>
<th>% of $</th>
<th>$ Area Amount</th>
<th># of Grants</th>
<th>% of # Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTS &amp; CULTURE</td>
<td>11%</td>
<td>$41,779</td>
<td>24</td>
<td>18%</td>
</tr>
<tr>
<td>ENVIRONMENT/SUSTAINABILITY</td>
<td>2%</td>
<td>$6,850</td>
<td>5</td>
<td>4%</td>
</tr>
<tr>
<td>EDUCATION</td>
<td>24%</td>
<td>$93,677</td>
<td>24</td>
<td>18%</td>
</tr>
<tr>
<td>HEALTH &amp; HUMAN SERVICES</td>
<td>42%</td>
<td>$168,840</td>
<td>49</td>
<td>38%</td>
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<tr>
<td>COMMUNITY BUILDING</td>
<td>21%</td>
<td>$84,335</td>
<td>29</td>
<td>22%</td>
</tr>
<tr>
<td><strong>TOTALS (ALL AREAS)</strong></td>
<td></td>
<td><strong>$395,481</strong></td>
<td><strong>131</strong></td>
<td></td>
</tr>
</tbody>
</table>


**Total Funds Granted:** $2,377,748  
**Number of Grants:** 774

<table>
<thead>
<tr>
<th>Community Foundation Grants</th>
<th>% of $</th>
<th>$ Area Amount</th>
<th># of Grants</th>
<th>% of # Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTS &amp; CULTURE</td>
<td>16%</td>
<td>$432,040</td>
<td>149</td>
<td>16%</td>
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<tr>
<td>ENVIRONMENT/SUSTAINABILITY</td>
<td>3%</td>
<td>$90,689</td>
<td>63</td>
<td>7%</td>
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<tr>
<td>EDUCATION</td>
<td>20%</td>
<td>$551,400</td>
<td>170</td>
<td>19%</td>
</tr>
<tr>
<td>HEALTH &amp; HUMAN SERVICES</td>
<td>49%</td>
<td>$1,355,128</td>
<td>354</td>
<td>39%</td>
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<tr>
<td>COMMUNITY BUILDING</td>
<td>12%</td>
<td>$343,972</td>
<td>169</td>
<td>19%</td>
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<tr>
<td><strong>TOTALS (ALL AREAS)</strong></td>
<td></td>
<td><strong>$2,773,229</strong></td>
<td><strong>905</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Grant Application Process**  Please provide a simple letter of general inquiry indicating needs and results to be achieved. The Community Impact Committee reviews these letters on a regular basis. Applicants will be advised about next steps in the grants process. For additional fund-specific grant application procedures please visit our website.
Women’s Fund

The Community Foundation’s Women’s Fund invites all to participate in purposeful philanthropy so that we can improve the status and quality of life for all women. In 2009 the Women’s Fund reviewed community needs and made the following four awards:

**Alternatives Venture Fund**
Support for AFCU’s Volunteer Income Tax Assistance program

**Foodnet Meals on Wheels**
Technology for nutrition outreach workers

**TC3 Foundation**
Bus passes to assist women attending classes

**The Women’s Opportunity Center**
Bus passes to assist women attending retail training classes and services

The Women’s Fund’s Laura Holmberg Award is presented annually to honor a woman who, in addition to excelling in her own work, has selflessly and voluntarily contributed time, talents, and skills in ways that promote the well-being of women in our community.

The 2009 Holmberg Award was presented to Rebecca Elgie a retired teacher and reading specialist and a single payer health care reform advocate since 2003. Rebecca serves on the steering committees of both the TC Workers Center and Single Payer New York. She is a member of the Unitarian Universalist Social Action Committee and a board member of the national organization, Healthcare-Now.

Howland Foundation

The Community Foundation of Tompkins County is pleased to work with the Helen Thomas Howland Foundation.

**2009 Helen Thomas Howland Grants**

FOR AGING SERVICES
- Human Services Coalition’s Health Planning Council—Living Better with a Chronic Disease for Seniors
- Beechtree Care Center—Dining at Home
- Challenge Industries, Inc.—Life Options: Expanding Community, Leisure, and Social Options for Adults with Disabilities

FOR YOUTH SERVICES
- The Village at Ithaca—Fresh Fruit & Vegetable Snacks at BJM
- Cornell Cooperative Extension of Tompkins County—Parents Apart
- Tompkins Community Action—Summer Jobs Build
- Corning Science and Discovery Center—Hidden Valley 4-H Camp Science Program
- Hangar Theatre—Project 4 Arts in Education
- Ithaca Health Alliance—Ithaca Free Clinic Family Practice Services

FOR ANIMAL WELFARE
- Cornell Cooperative Extension of Broome County—4-H Animal Science Program
- Humane Society of Broome County—Special Isolation Cages

FOR ENVIRONMENTAL PROGRAMMING
- Finger Lakes Land Trust—Private Land Stewardship Initiative
## Financial Statement

### Statement of Financial Position

<table>
<thead>
<tr>
<th>Assets</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash And Cash Equivalents</td>
<td>$1,603,527</td>
<td>$860,010</td>
</tr>
<tr>
<td>Unconditional Promises To Give</td>
<td>20,916</td>
<td>119,974</td>
</tr>
<tr>
<td>Investments At Market</td>
<td>3,899,219</td>
<td>2,679,665</td>
</tr>
<tr>
<td>Other Assets</td>
<td>211,896</td>
<td>200,055</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$5,735,558</strong></td>
<td><strong>$3,859,704</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts And Grants Payable</td>
<td>$31,652</td>
<td>$2,443</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td>31,652</td>
<td>2,443</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$146,237</td>
<td>$130,128</td>
</tr>
<tr>
<td>Unrestricted-Board Designated</td>
<td>3,404,223</td>
<td>2,672,674</td>
</tr>
<tr>
<td><strong>Total Unrestricted Net Assets</strong></td>
<td><strong>3,550,460</strong></td>
<td><strong>2,802,802</strong></td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>61,031</td>
<td>158,637</td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td>2,092,415</td>
<td>895,822</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$5,703,906</strong></td>
<td><strong>$3,857,261</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities And Net Assets</strong></td>
<td><strong>$5,735,558</strong></td>
<td><strong>$3,859,704</strong></td>
</tr>
</tbody>
</table>

### Statement of Activities

<table>
<thead>
<tr>
<th>Revenue</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions/Grants</td>
<td>$1,603,616</td>
<td>$1,194,775</td>
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<tr>
<td>Investment Income</td>
<td>832,275</td>
<td>(1,005,929)</td>
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<tr>
<td>Other</td>
<td>19,124</td>
<td>20,021</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$2,455,015</strong></td>
<td><strong>$208,867</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants &amp; Awards</td>
<td>$395,481</td>
<td>$268,330</td>
</tr>
<tr>
<td>Administration</td>
<td>212,889</td>
<td>186,772</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$608,370</strong></td>
<td><strong>$455,102</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Change in Net Assets</th>
<th>2009</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,846,645</td>
<td>(246,235)</td>
<td></td>
</tr>
<tr>
<td>Net Assets At Beginning Of Year</td>
<td>$3,857,261</td>
<td>$4,103,496</td>
</tr>
<tr>
<td>Net Assets At End Of Year</td>
<td>$5,703,906</td>
<td>$3,857,261</td>
</tr>
</tbody>
</table>

Community Foundation assets are held by:
AFCU, Charles Schwab, M&T Bank, and the Tompkins Trust Co.
Thank you for making the first ten years of your Community Foundation such a resounding success. Generous support continues to enable us to nurture and grow local assets and catalyze change to deliver lasting results in Tompkins County. It is our honor and pleasure to connect the passions of donors with results-oriented solutions for the needs and problems in our community.

Our local area is home to an amazingly accomplished and coordinated array of skilled organizations. Individually and as a sector they, we and you are dedicated to improving the quality of life in the arts, education, the environment, human services, and community building. Our commitment to the people and organizations of our home is forever.

Tompkins County, New York, and the nation continue to have challenging economic choices ahead. Your Community Foundation is planning for the future by aggregating and amplifying resources to permanently intensify our ability to prosper in these times and beyond.

As we celebrate ten years of philanthropic achievement we recognize with profound gratitude the magnificent support that has brought us to our many milestones today and what they mean for our future. We have received over $8.7 million of gifts and granted nearly $2.8 million in more than 900 grants. We celebrate the beginning of our second decade with assets of over $5.7 million. With our pledge to be local, connected, and forever we have magnified philanthropy for the good of all. Thank you.

George P. Ferrari, Jr.
Executive Director

Mariette Geldenhuys
Chairperson, Board of Directors

Board of Directors

Beverly Baker
Mary Pat Dolan
Linda Madeo
Kim Rothman
Fred Ballantyne
Mariette Geldenhuys
Nina Miller
Mickie Sanders-Jauquet
Priscilla (Percy) Browning
Jean Gortzig
George Ridenour
Diane Shafer
Caroline Cox
Howard Hartnett
John Rogers
David Squires

Staff

George P. Ferrari, Jr.
Executive Director

Janet Cotraccia
Program Officer

Amy LeViere
Executive Assistant

local ◆ connected ◆ forever
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Ending Service in 2009
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Tommy Bruce
David Call
John Moss Hinchcliff
Joanne James
Tom Torello
Esther Haney
Financial Officer

Board Emeriti
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Penny Boynton
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Eric Clay, PhD
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Brad Grainger
Matthew Green
Eldred Harris
Robert L. Harris, Jr.
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Caitlin Schryver
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Council on Foundations
Grantmakers Forum of New York
Tompkins County Chamber of Commerce
Tompkins County Funders Group

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