

The Schenectady Foundation's

Stockade Society



The
SCHENECTADY
foundation



The Schenectady Foundation

The Schenectady Foundation (TSF) is the only community foundation exclusively serving the people of Schenectady County, New York. Established as a trust in 1962, the mission of TSF is to achieve sustainable improvement in the health and welfare of people, organizations and neighborhoods in Schenectady County through the investment of philanthropic resources.

THE STOCKADE SOCIETY

In 2009, TSF created the Stockade Society to honor and recognize those who have made gifts to the Foundation through bequests or lifetime giving. These generous gifts grow the endowment, which allows the Foundation to provide support to the community for generations to come.

THE SCHENECTADY FOUNDATION DISTRIBUTION COMMITTEE

Herbert L. Shultz, Jr., Chair
Dr. Gabriel J. Basil
Mark Handelman
Jennifer Kenneally
Thomas O. Maggs
Dr. Walter L. Robb
Sarah J. Schermerhorn

NON-VOTING OFFICERS:

Robert A. Carreau, Executive Director
Robert T. Cushing, Treasurer
Michael Ozimek, Assistant Treasurer



“I’m proud to be a member of The Schenectady Foundation’s Stockade Society. My bequest to the Foundation will help ensure that funding will continue to be available to enrich our cherished community.”

**— HERBERT L. SHULTZ, JR., CHAIR
TSF DISTRIBUTION
COMMITTEE**

- The Schenectady Foundation is the only community foundation exclusively serving Schenectady County.
- TSF’s priority is to strengthen families and achieve positive outcomes for children.
- TSF is a community leader — keeping the dialogue focused on what is good for the entire community.
- TSF has a long record of outstanding stewardship of the trusts and endowed funds bequeathed to it.
- TSF created The Stockade Society to recognize those who share our commitment to the community through a bequest, planned gift or lifetime giving.



The Schenectady Foundation awarded its first grant in 1963 to the YMCA for \$250. Today TSF has grown its assets to more than \$30 million and has distributed about \$850,000 per year in grants and scholarships over the past five years.

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Here for Schenectady Now, Here for Schenectady in the Future

When a handful of Schenectady business leaders established The Schenectady Foundation (TSF) in 1962, they had no way to know what the needs of the community would be 20, 30 or even 50 years into the future. But their commitment to building a lasting charitable resource created a foundation with the financial and philosophical structure to endure, to grow and to serve the community's changing needs.

The Foundation has flourished, becoming a vital endowment for Schenectady County. It has supported more than 180 community organizations, and has provided a strong base of support for charitable projects both large and small. TSF has given substantial funding to support health care, childcare, youth achievement, and arts, civic and cultural programs.

TSF has minimal internal expenses relative to similar organizations. The result is that more funds reach the programs and organizations that serve the people of Schenectady. To date, TSF has given close to \$14 million in grants and scholarships benefiting tens of thousands of people. From Ellis Medicine to Union College to Bethesda House to Schenectady's Central Park Rose Garden, the impact of TSF is felt throughout the community.

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Growing up in Guatemala I spent time living on the streets where I had no shoes, went days with little food, and never went to school. When I was 13, a family in Scotia adopted me. My American family didn't speak Spanish, and I didn't know any English. I had to learn everything. I went to college on a basketball scholarship, but had a very difficult time and felt I had no one I could go to.

When I was 21, I became pregnant, dropped out of college, and moved back home. My family was unsupportive, and I was scared and lonely. I found a wonderful Family Support Worker at Healthy Schenectady Families. She visited me every week and answered all my questions. She cared how I was doing. It was such a relief to have somebody to vent to, cry to, and trust. She taught me to set short-term and long-term goals. After my son was born, I took two classes at SCCC, and got A's in both. I then enrolled full time at UAlbany. I will graduate soon with a major in math and Spanish education, and go on to get a master's degree. I want to be a high school math teacher.

I know what I want for myself, but if I hadn't had the support from Healthy Schenectady Families, I don't think I would have made it. I am so grateful to TSF for supporting this program and making sure it is there to help people like my son and me. Sometimes I want to give up, but my son gives me motivation. I want him to have the best.

— ROSA PARDEE, PROGRAM PARTICIPANT



Strengthening Families

TSF'S STRATEGIC FOCUS IS TO STRENGTHEN FAMILIES BY BUILDING THEIR CAPACITY TO SUPPORT THE SUCCESS OF THEIR CHILDREN IN THEIR FAMILY, SCHOOL AND COMMUNITY.

Since 2009, the Foundation, along with its grantees and community partners, has been working toward this vision by supporting a continuum of integrated community resources that strengthen families. We are helping families achieve positive outcomes for their children by building self-reliance, improving academic, social and life skills and promoting wellness. Community resources and services are bridged by a common strategy to engage and support the entire family.

Strengthening Families grants span efforts from prenatal care to college scholarships to support for caregivers of aging parents; from Early Head Start to youth leadership development to job skills training.

TSF has so far invested more than \$2.3 million in Strengthening Families grants.

“Strengthening Families is more than funding effective programs. Our success has come from developing trust and collaboration among community organizations and their leaders.”

**— ROBERT CARREAU,
TSF EXECUTIVE DIRECTOR**

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“The only agenda The Schenectady Foundation has is ‘What is good for the community?’ No other local group can do what the Foundation does.”

**— DR. DAVID PRATT, COMMISSIONER
SCHENECTADY COUNTY DEPARTMENT
OF PUBLIC HEALTH**

A Community Leader

TSF IS A LEADER AMONG NONPROFIT AGENCIES AND OTHER COMMUNITY ORGANIZATIONS, FORGING COLLABORATIONS AND KEEPING THE DIALOGUE FOCUSED ON WHAT IS GOOD FOR THE ENTIRE COMMUNITY.

Effective outgrowths of the Foundation's leadership include:

STRENGTHENING FAMILIES ADVISORY COMMITTEE

TSF convenes this team of community leaders and nonprofit CEOs to exchange ideas and information, and to develop solutions in a spirit of openness that looks beyond individual organizational concerns and focuses on the community as a whole.

SCHENECTADY BRIDGES

This pilot project, funded by TSF, applies groundbreaking strategies to reduce and alleviate poverty. The following organizations are being trained in the Bridges Program: City Mission of Schenectady, Schenectady Community Action Program, Parsons Child & Family Center, Hometown Health Centers, Ellis Medicine, Capital Region BOCES, Healthy Schenectady Families and Catholic Charities.

SUSTAINING VITAL PROGRAMS

The Foundation's leadership is deeply felt in its commitment to building sustainable community programs. TSF has made substantial lead gifts to vital institutional projects such as the Ellis Medicine's Bellevue Womens' Center and Schenectady Public Library's new children's wing. TSF grants leverage funding sources from outside the community for proven programs like Early Head Start. Matching grants have stimulated giving by other foundations and individuals to programs such as Empire State Youth Orchestra and Capital Region Sponsor-a-Scholar.



Responding to Community Need

In addition to its grants and scholarship program, TSF has the ability to respond when special needs arise in the community. As the frigid 2010 Holiday Season approached, TSF learned that many area organizations that serve those in need were heading into one of their busiest times of the year, yet were facing their own financial struggles as the economy had taken a toll on their fundraising efforts. TSF stepped in with grants to The City Mission, Salvation Army, Northeast Parent & Child and Bethesda House, which were then able to serve more than 2,500 people, offering shelter, putting food on the table, distributing warm clothing and providing toys for children who would have otherwise had none.

RECENT TSF GRANTS

Alzheimer's Association, Education and Support to Caregivers \$15,000
Bigelow Corners Partnership, Planning Grant \$60,000
Capital District Child Care Council, Family-Centered Child Care \$160,000
Capital Region Sponsor-a-Scholar, High School to College Mentoring Program \$50,000
Carver Community Center, Child Care Program Improvements \$28,000
Catholic Charities, Healthy Schenectady Families, Home Visiting Program \$240,000
Community Human Services, Mental Health Support for Preschool Children \$26,500
Ellis Medicine, Bellevue Women's Center Expansion \$1,000,000
Parsons Child & Family Center, Early Head Start Expansion Grant \$180,000
SAFE Inc. of Schenectady, Facility Expansion Grant \$100,000
St. Anthony's Early Childhood Program, Kitchen and Nutrition Program \$10,000
Salvation Army, Women and Children's Housing Renovation \$27,000
Schenectady Bridges, Multi-Agency Poverty Alleviation Training \$22,000
Samaritan Counseling Center, Project PASS, School Drop-out Prevention Program \$160,000
Samaritan Counseling Center: Working with Families Training Workshops \$33,500
Schenectady Community Action Program, Bigelow Avenue Street Safety Project \$202,000
Schenectady County Chamber Foundation, Certificate of Employability Program \$60,000
Schenectady County Public Library, Children's Room Expansion \$100,000
Schenectady Jewish Community Center, Facilities Improvement \$100,000
UAlbany School of Social Welfare, Internships in Aging \$40,000
Union Graduate College, Sponsor-a-Scholar Master's Degree Program \$15,000
Working Group on Girls, Girls Day Out & Middle School Mentoring Program \$13,000

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The Stockade Society

AN IMPORTANT RECOGNITION

We are indebted to The Schenectady Foundation's founders who guided and nurtured TSF for decades, enabling it to become the important community resource it is today.

The Foundation continues to grow only because other generous people share that commitment to TSF. The Stockade Society was created to acknowledge our donors during their lifetimes, as well as to inspire other like-minded individuals to discover the benefits of a gift to TSF.

EVERYONE CAN MAKE A DIFFERENCE

Regardless of the size of your estate, as a member of The Stockade Society you will make a difference to Schenectady. Over time, your gift will grow, yielding income each year that will go back to the community as grants to support critical programs and services, to help change lives, to touch those most in need.

TSF is Schenectady's Foundation. Please consider becoming part of the Stockade Society through a bequest, planned gift or lifetime giving, and help us sustain our essential work.

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“The Foundation is a good steward not only of the resources entrusted to it but, more importantly, of the community it serves.”

**— SARAH SCHERMERHORN
TSF DISTRIBUTION COMMITTEE**

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Inspiring the Future

STOCKADE SOCIETY GIVING OPPORTUNITIES

Membership in the Stockade Society can be obtained in two ways:





1. PLANNED GIVING

– membership in the Stockade Society begins when an individual or couple signs a commitment form for a planned gift to the Foundation. A planned gift may be a bequest through a will, charitable remainder trusts, life insurance, uni-trusts or other gift as deemed appropriate. There is no specific dollar amount required.

2. LIFETIME GIVING

– membership in the Stockade Society begins when an individual or couple achieves \$25,000 or more in cumulative giving or through a one-time gift.

BENEFITS OF STOCKADE SOCIETY MEMBERSHIP INCLUDE:

-  Invitation to and recognition as a member of the Society at the annual TSF Stockade Society event
-  Invitations to all recognition or related events
-  Recognition on invitations to Stockade Society Events
-  Recognition in TSF publications, e.g. annual report, Stockade Society letterhead

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Estate Planning Information

CHECKLIST FOR GIVING

When considering a bequest or contribution to The Schenectady Foundation, we recommend you:

- ✔ Contact us to discuss your interest. There are several ways you can make a gift, and we can help you choose the option that is best for you.
 - ✔ Make a bequest in your will
 - ✔ Establish a charitable lead or remainder trust
 - ✔ Make a current gift of appreciated assets or cash
 - ✔ Make a gift of life insurance
 - ✔ Explore other planned giving options that meet your charitable intent
- ✔ Obtain legal and financial advice to maximize the tax advantages of your gift, and ensure that the gift is properly structured in your estate.
- ✔ Be sure to use our legal name in your estate documents: **The Schenectady Foundation.**
- ✔ Find out if your company will match your contribution if you are making a current or annual gift.
- ✔ Let us know if you would like to be included as a member of **The Stockade Society.**

TO START THE CONVERSATION ABOUT YOUR INTEREST IN TSE, CONTACT:

Robert A. Carreau, *Executive Director*
376 Broadway | Schenectady, NY 12305

Telephone | 518.393.9500

Email | racarreau@schenectadyfoundation.org

Web | www.schenectadyfoundation.org

TRUSTEE BANKS

Trustco and KeyBank are both eligible trustees of donor funds, investing and managing Foundation assets guided by the investment policies of the Foundation. You may choose either of these banks to hold and manage the principal of your gift.





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