

GOLISANO

FOUNDATION

2000 Annual Report

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DIRECTOR'S MESSAGE

GOLISANO FOUNDATION

The Golisano Foundation has been fortunate to see another year of significant growth. Last year we reported an increase in assets, the addition of new trustees and an expansion in the Foundation's areas of interest.

This year, in an effort to carefully and conscientiously manage the Foundation's growth, a vigorous strategic planning process was undertaken.

Strategic planning is multi-dimensional. It takes a retrospective look, an inventory of values and provides direction for the future. Naturally, questions arise--the answers guiding the planning process. Where have we been, where are we today and where do we want to be tomorrow?

The Golisano Foundation was founded in 1985 for the purpose of improving the quality of life for the disabled, elderly, and indigent. While the interests of the Foundation are broad and the Trustees remain committed to considering a wide range of projects demonstrating results, a definite focus has emerged.

The first phase of our strategic planning process yielded a strong interest to sharpen the Foundation's focus and to maximize the impact by targeting our financial resources to a well-defined portfolio of program strategies serving the disabled.

The second phase of the process involved an aggressive information gathering effort. Human service providers, funding partners and consumers were brought together with the Trustees to determine potential areas for greatest impact in the disabilities field. Collectively, we looked at trends--demographic, political and economic--that will have an impact on the disabled and needed services. Given the internal and external information sources, much was learned about the needs within our community and how we can affect the future. Key issues were identified and actions initiated.

The Trustees and I are proud to support the organizations that deliver excellent services to the community. We look forward to another year of continued partnership with providers, consumers and other funders to shape and achieve the Foundation's program goals and vision.

Ann Costello, Director
April 2001



ABOUT THE GOLISANO FOUNDATION

Mission Statement

The Golisano Foundation seeks to be a proactive partner with providers, organizations and the community to create an environment of dignity and care for those in need, particularly disabled individuals and their families.

We believe we can, and will, create the biggest impact by focusing our financial resources on initiatives that result in long term, substantive change.

Primary Funding Interests

The Golisano Foundation is primarily interested in funding programs that will make a long lasting, positive impact in the area of disabilities. The Foundation's definition of "disability" is broad, covering a wide range of conditions and circumstances including persons with developmental disabilities, mental illness, learning disabilities, neurological disorders and health related conditions.

The Golisano Foundation will support programs that create opportunities for people with disabilities to be part of typical communities and have choices about the nature and level of participation in those communities. The Foundation will invest the majority of its financial resources in programs to help people with disabilities achieve their maximum potential through increased self-determination, independence, productivity, and integration in all facets of life. (ADA, 2000)

Other Areas of Interests

Throughout the strategic planning process, the Trustees maintained interest and willingness to consider other worthwhile projects in the community such as those demonstrating positive results in substance abuse and teen pregnancy prevention, educational programs promoting self-sufficiency, and elderly support services. With limited yet targeted financial resources, the Trustees believe the Foundation has the capacity to address various aspects of these programs and have a positive impact on program beneficiaries.

The Trustees

Gloria A. Austin
G. Thomas Clark
B. Thomas Golisano

Nancy N. Koch
James D. Murray
Margaret E. Raymond

Staff

3

Ann Costello, Director
David A. Still, Fishers Asset Management

Geographic Distribution

- Primarily, the Rochester Metropolitan Area.
- Grants may be considered for programs in surrounding counties addressing the Foundation's primary funding interests.

Non-Grant Areas

The Foundation typically does not make grants in the following areas:

- Endowments, fellowships, professorships, medical research, land acquisition, loans, grants to individuals, fund raising events, or municipally sponsored programs.

How to Apply

Eligibility and Application Procedures:

- The Foundation supports qualified nonprofit organizations that are exempt from federal income taxes under Section 501 (c) 3 of the Internal Revenue Code.
- Applicants to the Golisano Foundation should use the Common Application Form developed by the Rochester Grantmakers Forum. The guidelines for completion and the required materials are included in the instruction package. Copies of the form are available in the public library, at the Grantmakers Forum office, through the Grantmakers Forum website (www.grantmakers.org) and at the Golisano Foundation office.
- Applicants will be screened for compatibility with Foundation's interests and purpose.

Decision-Making Process

- Site visits and conferences with grantseekers may be scheduled if needed.
- Foundation Trustees make funding decisions on a quarterly basis in January, April, June and October.
- Applications received two weeks prior to each meeting are generally included in that meeting's agenda.
- Final notification of funding decision is generally within two weeks after the respective meeting.

ACTION PLAN 2000

Response to Key Issues...

Based on what was learned through the strategic planning process, the Foundation determined that it would pursue innovative endeavors by social entrepreneurs--*venture philanthropy*. By anticipating the changing needs of the clients served, the Foundation will target its funds to programs for individuals with disabilities and their families, and seek opportunities for lasting impact by entering into strategic partnerships for sustainable change.

Two key issues surfaced, to which the Foundation responded:

- **The aging of the disabled population and their parents/caregivers**
- **Recruitment and retention of quality direct-care workers**

The Foundation believes it can create the greatest value by funding projects that result in a new framework that shapes future work in the disabilities field.

When Childcare Lasts a Lifetime

"I never thought my son would outlive me..." Those simple words, spoken by the mother of a developmentally disabled adult, have spurred a unique, collaborative planning process here in Monroe County.

The need to help families plan for the future of their disabled son or daughter is compelling. Too many families of aging persons with disabilities are postponing planning for the future care of the disabled person--postponing so long that sometimes the result is crisis. This lack of planning, whether due to fear or mis-information, can be tragic for the disabled person.

Imagine that you are a 50 year-old disabled adult. You are dependent on your 75 year-old mother for a place to live, for food, for your care. Now imagine that your mother is gone. According to Dr. Matthew Janicki, a leading expert in the field, "the most outstanding characteristic of caregiving families is their lack of serious thinking about the future living situation of the relative with a disability." (*Help for Caring, NYS DD Planning Council, 1996*).

In response to this growing phenomenon, the Foundation has invested \$125,000 for a planning research study spearheaded by LIFESPAN and Al Sigl partner agencies. The process is led by Sally Trafton, JD, University of Rochester Department of Community and Preventative Medicine, with Tom Swartz of TS Consulting and Jocelyn Goldberg Schaible of the Rochester Research Group.

The ultimate goal is the creation of a seamless, comprehensive service targeted at preventing caregiving crisis among aging persons with disabilities and their families. The coordinated system would assist with "life course planning"--planning done by a parent, sibling or other informal caregiver to make arrangements for the care and support, after the death or incapacity of the informal caregiver, for a dependent adult with disabilities. The consolidation of this type of service will avoid duplication at each individual agency and ensure that all families receive the same scope of quality guidance and consultation in areas such as finance, legal and care options.

Quality Workers for the Disabled

In an effort to make a lasting, positive impact in the area of developmental disabilities, the Foundation committed \$250,000 in matching funds to *Full Circle--Careers in Caring*, a local collaborative of developmental disability agencies. The goal of this initiative, is to recruit and retain direct support workers for ARC of Monroe, Continuing Developmental Services, Heritage Christian Homes, and Lifetime Assistance, Inc.

In July of 2000, after several months of deliberation, the agencies agreed that the greatest benefit would come from launching a concentrated media campaign to attract direct support personnel to the field.

James Branciforte, CEO of Lifetime Assistance, Inc. says, "We were issued a challenge and asked what can we do collectively. Together we identified the greatest needs in our community and agreed that the greatest benefit would come from launching a concentrated media campaign to attract direct support personnel."

COLLABORATION

Community Partners...

The goal of the partnership is to assure a high quality, dedicated work force is the top issue facing comprehensive developmental disability service providers. This is a complex, multi-dimensional problem, but--with service demands increasing and labor pools shrinking--it is without question the most important and meaningful area in which to positively affect the lives of those served by the four participating agencies.

This collaborative effort is being accomplished through a major, two-year awareness campaign that includes radio, television, internet, public relations and direct marketing.

The support of experts in the fields of research and marketing communications was enlisted to ensure a successful campaign launch--this included Joceyln Goldberg Schaible of the Rochester Research Group and a marketing communications team from Infantino Associates.

The Rochester Research Group conducted a multi-part research study to provide strategic and tactical insight and evaluation for the two-year multi-media campaign. Infantino Associates developed the concept of *Full Circle Careers in Caring*. The campaign was launched in April 2001.

FullCircle
Careers in Caring

GRANTS 2000

Financial Summary

Growth in Net Assets

The growth in our net assets, especially in recent years, has been greatly influenced by the very favorable performance of the stock market, as well as the continuing financial support of the Foundation's benefactor. This has resulted in our net assets growing from \$4 million to today's \$25 million.

Distribution of Funds by Service Category for the Ending Fiscal Year

<u>Category</u>	<u>Funds Dis't.</u>	<u>% of Total \$</u>	<u># Grants</u>
Services for the Disabled	\$1.1MM	75%	23
Education/Prevention	\$236,400	17%	17
Helping Those in Need	\$62,225	4%	6
Seniors/Health Care	\$47,800	3%	5
Total	\$1,405,928	100%	51

Services for Individuals with Disabilities

Consistent with our primary funding focus, the Foundation supported a wide range of programs for individuals with disabilities--a new business enterprise for the blind and visually impaired, summer camps for youth with disabilities, art and music therapy, and a new classroom for children with autism. All funded programs share our goal of providing services in an environment that emphasizes the dignity of every person through caring relationships.

The Advocacy Center

\$15,000 for Developmental Disabilities Public Education Services.

Al Sigl Partner Agencies

\$300,000 for "A Gathering of Hearts Partnership Campaign," to upgrade and expanded facilities and technology.

American Red Cross

\$50,000 to renovate a bakery used to train and instruct students with disabilities.

ABVI - Goodwill Industries

\$75,000 for the CD ROM Replication/Duplication Business Enterprise.

ARC of Livingston/Wyoming Counties

\$2,000 to assist individuals and families with basic necessities.

Camp Abilities

\$5,000 for Camp Abilities 2001, a summer program for blind and multiple handicapped children.

Continuing Developmental Services

\$50,000 to expand the Art and Music Therapy program.

\$50,000 for equipment and renovations to the Unistel employment facility.

Empire State College Foundation

\$7,500 for the DEED 2000 Conference on disabilities.

Happiness House--Finger Lakes United Cerebral Palsy, Inc.

\$ 8,900 for sensory room equipment for children with autism.

\$10,000 toward the purchase of a van for the Community Re-Integration Project for Adults with Brain Injury.

Hope Hall

\$65,240 capital support for renovations to the school to help improve conditions for children with learning challenges.

Services for Individuals with Disabilities (cont.)

Legal Assistance of the Finger Lakes

\$10,000 for the Finger Lakes Special Education Law Project.

LIFESPAN, Inc. and Al Sigl Partner Agencies

\$125,000 for the Aging Persons with Disabilities Planning Project.

Lifetime Assistance, Inc.

\$100,000 capital support to renovate/expand the Vocational Center.

\$50,000 (of \$250,000 commitment) for development and research for the staff recruitment project/media campaign.

\$12,500 for the Family Cash Subsidy Grant Program that assists needy families with basic necessities.

Medical Motor Service

\$30,000 for the two-way radio conversion project.

Muscular Dystrophy Association, Rochester/Finger Lakes Chapter

\$10,000 for the summer camp program.

Rochester Rehabilitation Center

\$25,000 for equipment for the Information Technology Training Program.

\$10,000 for the Rochester Wheels, a wheelchair basketball program.

Upstate Multiple Sclerosis Society

\$33,333 for programs serving individuals and families with multiple sclerosis.

Visiting Nurse Foundation

\$15,000 for the Meals on Wheels for the Disabled Under Age 60 Program.

Education/Prevention

Education and learning takes many forms--from the more traditional institutes of higher education to community-based programs to strengthen and support families. Last year, the Golisano Foundation supported a variety of "educational" programs designed to enhance individual achievement, teach new skills, and help young people make positive, healthy choices.

Aquinas Institute of Rochester

\$41,500 for the Aquinas Technology Program--Science Education.

Big Brothers/Big Sisters of Rochester

\$6,000 to support youth prevention services.

Charles G. Finney Corporate High School

\$25,000 for computer equipment and technology upgrades.

Children's Institute (formerly Primary Mental Health Project)

\$5,000 for the A.C.T.--For the Children Program.

Cobblestone Arts & Educational Center/St. Joseph's Villa

\$5,000 for the "Celebration of Youth" summer program.

Council on Alcoholism and Other Chemical Dependencies

\$1,000 for "Family Guide for Alcohol and Drug Abuse Prevention."

HORIZONS Student Enrichment Program

\$5,000 for scholarships for needy children participating in the summer enrichment program.

Naples Youth Prevention Program

\$8,400 for substance abuse/teen pregnancy prevention program for high risk youth.

Education/Prevention (cont.)

Our Lady of Mercy High School

\$75,000 for technology upgrades.

Rochester Children's Nursery

\$15,000 for the Early Childhood Inclusion Project.

Rochester Grantmakers Forum

\$5,000 for the WILLpower Program.

Rochester Landscape Technicians Program

\$10,000 for the landscaping and horticulture employment program.

South East Area Coalition

\$5,000 for the summer session of Team 2000--Teen Employment and Mentoring Program.

Sojourner House

\$10,000 for technology upgrades.

The Growing Place

\$2,500 for capital improvements at new day care site.

Threshold

\$12,000 for the Rochester Adolescent Pregnancy Prevention Program (RAPPP).

United Way of Greater Rochester

\$5,000 for TRAK (Technology to Recover Abducted Kids) equipment.

Senior Services/Health Care

The Foundation supported several programs designed to help senior citizens remain independent in their homes and comfortable in assisted living arrangements. We also funded health care services for those who are sick and may be without support from family or friends.

AIDS Rochester, Inc.

\$10,000 for the Harm Reduction/Syringe Exchange Program.

Bishop Sheen Ecumenical Housing

\$10,000 for furnishings at its senior living center.

Cancer Action

\$15,000 to help establish a Rochester based Gilda's Club, a cancer support program.

Catholic Family Center

\$5,000 for the STAR (Support to Aged Residents) Program.

Mercy Center with the Aging

\$7,800 for the Care for the Caregiver Program.

Helping Those in Need

The Foundation funded a variety of programs providing assistance to individuals and families in our community. The programs share our goal of helping individuals grow and develop their full potential and lead healthy, productive lives.

Catholic Charities of Livingston County

\$5,000 for the housing support program, Partnership for Success.

Chances & Changes, Inc.

\$20,000 for "A Safe Place" capital campaign, a shelter for battered women and children.

Community Temple Holiness Church

\$3,000 toward purchase of kitchen equipment for its meal program.

Greece Ecumenical Food Shelf

\$5,000 capital support for its Food Shelf and Clothing Closet programs.

Interfaith Action

\$17,500 for the Gateway Project, a neighborhood development project in Rochester's west and northwest sections.

Veterans Outreach Center

\$11,755 to help with the purchase of a van.

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