



MISSION: In partnership with our community, we ignite positive change and create a legacy of impact.

VISION: We see a vibrant region where every resident feels connected and has the opportunity to thrive.

Core Values:

Versatility
Inclusivity
Trustworthiness
Stewardship



As we look back at 2021, we celebrate it as a year filled with blessings and losses, achievements and setbacks. It was the year we hoped would be free from pandemic limitations, but when that wasn't possible, we pressed on, doing the work that the Chautauqua Region Community Foundation was established to do.

We proudly deployed nearly \$4 million in grants and scholarships to support hundreds

of organizations and almost 700 students. We worked together with donors to establish twenty new funds to remember and honor beloved family, friends and neighbors. We achieved an all-time high in total assets under management at \$142 million and saw an 18.7% total rate of return on our portfolio. We conducted a thorough analysis and deemed it prudent to increase grant spending rates by 0.25% for all fund types for 2022.

Perhaps the most important work we did was internal. We examined the processes and practices of the Foundation and identified opportunities to bring more diverse voices to our decision-making. We committed ourselves to learning, listening and leading in ways that ignite positive change. We launched a refreshed logo and finalized new mission and vision statements. Together with core values that reflect who we are who we strive to be, we are lighting the way for every resident to feel connected and have the opportunity to thrive.

Par E. McCan

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2021 AT A GLANCE



Total Assets

\$142 million



Gifts Received

\$2.6 million



706
ENDOWED FUNDS



203
GRANT RECIPIENTS



NEW FUNDS



\$1.3 M SCHOLARSHIPS AWARDED



32.7 MGRANTS AWARDED



680 STUDENTS AWARDED

TOTAL IMPACT FOR 2021

\$3,975,308



"Serving as a community leader means listening to and amplifying the voices of those most directly impacted by decisions."

Tory Irgang
Executive Director

Lighting the Way Through

COMMUNITY LEADERSHIP

Throughout 2021 there were opportunities for the Foundation to serve as a leader in identifying and meeting the changing needs of the community.

The Community Foundation was an early funder of the Inclusivity, Diversity, Equity, and Accessibility (I.D.E.A.) Coalition, led by the United Way of Southern Chautauqua County. This effort seeks to serve as a bridge between directly impacted populations and the member organizations to collectively create systemic and sustainable change.

As a result of staff's engagement in the I.D.E.A. Coalition, the Foundation recognized the need to examine internal processes, practices and policies to ensure we are a foundation of, by and for the people in the community which we are located today.

We began analyzing the impact of grantmaking and scholarship awards using various demographics. Those data will help us shape our strategies to make sure we live into our core value of inclusivity.

Recognizing we cannot do this work alone, we collaborated with other funders to address the needs of our community. Our dollars were used to leverage grants from The Buffalo Bills Foundation, John R. Oishei Foundation, Community Foundation for Greater Buffalo, and Ralph C. Wilson Jr. Foundation, just to name a few.

When \$28 million in American Rescue Plan Act funds were announced for the City of lamestown, the Foundation facilitated community listening sessions to gain perspective from residents. Topics like housing stability, neighborhood revitalization, economic and workforce development, health and wellbeing, recreation and youth development were mentioned repeatedly by the 118 attendees. The Foundation presented a summary of this feedback to City Council as they finalized the approach to use.

The opportunities for community leadership continue to emerge as we seek to ignite positive change and create a legacy of impact.



Bishop Leecroft Clarke and Amy Rohler, United Way of Southern Chautauqua County executive director, announce the creation of the I.D.E.A. Coalition.

"This Coalition is committed to both anti-racist and broad social justice work. We plan to prioritize the concerns of historically marginalized communities in our county and create space for collective and collaborative work to address those concerns."

> Bishop Leecroft Clarke I.D.E.A. Coalition Project Director

COMMUNITY FOUNDATION





"Our community continues to amaze us with their generosity during this annual event."

Elizabeth Jones Community Impact Officer

Lighting the Way Through

LOCAL PHILANTHROPY

On June 10, Give Big CHQ generated more than \$410,000 for local nonprofit organizations.

Hosted by the Chautauqua Region and Northern Chautauqua Community Foundations, this 24-hour online fundraising event raises dollars and awareness for local nonprofit organizations.

According to Elizabeth Jones, community impact officer, individuals made 4,117 donations to support their favorite causes and organizations. Nearly 70% of those donations were \$50 or less.

In addition to dollars raised by individuals, the Community Foundations sponsored The 716 Stretch, a pool of \$45,000 that was awarded to 84 qualifying nonprofits. Organizations qualified by receiving at least 10 unique donations between 7:16 a.m. and 7:16 p.m.

"One of the special things about Give Big CHQ is that it really is a community-wide event," Elizabeth said. "This day is all about our nonprofit organizations and is a great opportunity to come together as a community to celebrate the important work they do every day."

Since the initial event in 2018, Give Big CHQ has helped raise more than \$1 million for over 150 local nonprofit organizations. It has also provided organizations with tools and engagement strategies to help maximize their fundraising efforts.





\$411,630 raised



2,608 donors



119 non-profits



Students receive basic CPR training during a lesson at the Chautauqua Safety Village.

"We've participated in Give Big CHQ since 2019 to raise awareness about our organization and funds for the important work we do. The generosity of our community is outstanding and helps us continue to provide a wide range of experiential safety training and services for children and community members."

Jessica Dayton Chautauqua Safety Village Executive Director

COMMUNITY FOUNDATION 07



"We are honored to recognize Mike and his inspirational leadership that has deeply impacted our region."

Peter Stark John D. Hamilton Community Service Award Committee Chair

Lighting the Way Through SERVICE

During a reception at the Chautauqua Harbor Hotel on September 24, Mike Metzger was presented the 2021 John D. Hamilton Community Service Award.

Growing up in Rochester, NY, Mike was inspired by his father's involvement at their local United Way and became heavily involved with the United Way of Southern Chautauqua County when his family moved to the area more than 35 years ago.

As they raised their two daughters in Chautauqua County, Rachel Taliercio and Laura Kerls saw first-hand how having a supportive family and the desire to serve others could truly make a difference in the community.

"We are a product of those around us and I know our grandfather has served as an inspiration to our dad," Rachel said. "I see my father and grandfather reflected in (my sister) Laura's volunteerism and her dedication to better the lives of those who are less fortunate extends our family's legacy."

Over the years, Mike has demonstrated a deep commitment to the community through his volunteer service. He has held leadership positions with the Community Foundation. American Red Cross of Southwestern New York. Manufacturers Association of the Southern Tier, and The Resource Center. He also spent 25 years with Junior Achievement of Western New York, teaching Economics for Success to eighth grade students at Falconer Central School.

Currently, he serves as a member of St. Mary of Lourdes' Finance Committee, Chautauqua Institution's Board of Trustees, the Community Foundation's Investment Committee, and as chair of the Chautauqua Industrial Development Agency Board of Directors.

Since 1993 the John D. Hamilton Community Service Award has been presented annually to recognize those who demonstrate dedication, leadership and support in furthering community spirit and enriching the quality of life in the area.

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Mike Metzger and his family during the John D. Hamilton Community Service Award presentation.

"My mom and dad raised us to believe that volunteering was expected and an essential part of giving back to our community."

Mike Metzger

COMMUNITY FOUNDATION OS



"Our investment committee is a group of experienced community volunteers who take great pride in stewarding the assets under the Foundation's oversight."

lake Schrantz Fiscal Officer

Financials

Knowing the global economy remained in unchartered territory, the Investment Committee scheduled additional meetings throughout 2021 to hear from a variety of economic advisors. Combined with the quarterly review of the Foundation's portfolio performance, and regular dialogue with our investment consultant, this dedication reflects the Foundation's ongoing commitment to financial stewardship.

At the end of 2021, the Foundation netted a total rate of return of 18.7%. The balance of the Foundation's 700+ endowment funds totaled \$142.2 million.

In November, the Board of Directors approved an increase in grant spending rates for 2022. This decision was deemed prudent and made an additional impact of \$234,113 possible.

Fund Type	2022 Grant Spending Rate
Agency	4.35%
Community Service	4.50%
Designated	4.35%
Donor Advised	4.35%
Field of Interest	4.35%
Scholarships	3.75%

Target Asset Allocation



15.0%



Value 22.5%



Large Cap Growth 22.5%



International 8.0%



Value 8.0%



Small Cap Value 5.5%



Small Cap Growth 5.5%



Estate 5.0%



Income 5.0%

Alternatives 3.0% Fixed

STATEMENT OF FINANCIAL POSITION

DECEMBER 31, 2021 AND 2020

ASSETS				
		2021		2020
Cash and restricted cash	\$	3,485,080	\$	3,098,600
nvestments, at fair value		138,064,746		118,852,633
Inconditional promises to give		235,352		270,806
Prepaid expenses		36,036		22,663
Cash surrender value of life insurance		-		32,412
Property and equipment, net	_	332,473		342,144
TOTAL ASSETS	\$	142,153,687	\$	122,619,258
LIABILITIES AND NET ASSETS				
Accounts payable	\$	34,182	\$	18,253
Refundable advance		-		123,322
Grants payable		1,384,148		1,361,251
Funds held for agencies		14,617,141		12,635,408
Gift annuities payable		223,778		207,361
Total liabilities		16,259,249		14,345,595
Net assets without donor restrictions:				
Endowed		123,753,499		106,827,244
Non-Endowed		743,069		109,784
Charitable Gift Annuities		476,378		376,917
Operations and Administration		921,492		959,718
Total net assets without donor restrictions		125,894,438	·	108,273,663
Total fiet assets without donor restrictions		120,004,400		100,210,000
TOTAL LIABILITIES AND NET ASSETS	<u>\$</u>	142,153,687	<u>\$</u>	122,619,258
TOTAL LIABILITIES AND NET ASSETS STATEMENT OF ACTIVITIES		142,153,687 DECEMBER 3		
STATEMENT OF ACTIVITIES			1, 2021 /	
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER		DECEMBER 3	1, 2021 /	AND 2020
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS	_	DECEMBER 3	1, 2021 <i>/</i>	AND 2020 2020
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions		DECEMBER 3 2021 2,350,604	1, 2021 /	AND 2020 2020 1,926,509
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS	_	DECEMBER 3 2021 2,350,604 19,790,802	1, 2021 <i>/</i>	AND 2020 2020 1,926,509
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions	_	DECEMBER 3 2021 2,350,604 19,790,802 (19,306)	1, 2021 <i>/</i>	1,926,508 12,780,234 (18,28°
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss)	_	2021 2,350,604 19,790,802 (19,306) 116,323	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities	_	DECEMBER 3 2021 2,350,604 19,790,802 (19,306)	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income	_	2021 2,350,604 19,790,802 (19,306) 116,323 45,800	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148 76,639
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income	\$ enues, gains, (losses),	2021 2,350,604 19,790,802 (19,306) 116,323	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148 76,639
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STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income Total reveand other	\$ enues, gains, (losses),	2021 2,350,604 19,790,802 (19,306) 116,323 45,800	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148 76,639 14,856,243
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REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income Total reve and other EXPENSES Distributions to beneficiaries Program services, administrative, and fundraising	snues, gains, (losses),	2,350,604 19,790,802 (19,306) 116,323 45,800 22,284,223	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,287 91,148 76,639 14,856,243 3,849,322 952,203
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income Total reverse and other expenses Distributions to beneficiaries Program services, administrative, and fundraising expenses Total expenses	enues, gains, (losses), support	2,350,604 19,790,802 (19,306) 116,323 45,800 22,284,223 3,587,820 1,075,628	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,28) 91,148 76,638 14,856,243 3,849,322 952,203 4,801,528
STATEMENT OF ACTIVITIES REVENUES, GAINS, (LOSSES), AND OTHER SUPPORT WITHOUT DONOR RESTRICTIONS Contributions Investment return (loss) Net revaluation of gift annuities Administrative fee income - agency-held funds Returned grants and other income Total reve and other EXPENSES Distributions to beneficiaries Program services, administrative, and fundraising expenses Total exp.	enues, gains, (losses), support enses CTIONS	2,350,604 19,790,802 (19,306) 116,323 45,800 22,284,223 3,587,820 1,075,628 4,663,448	1, 2021 <i>/</i>	1,926,509 12,780,234 (18,28) 91,148 76,639 14,856,243 3,849,322 952,203 4,801,525
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Copies of the Foundation's annual audited financial statements and exempt organization returns are available online by visiting crcfonline.org or by contacting Jacob Schrantz, fiscal officer, at (716) 661-3390.

COMMUNITY FOUNDATION 1



"Domestic violence is a community issue that doesn't discriminate based on age, sex, race or orientation and its important that it gets attention from the local police department."

Emma Ward Jamestown Police Department Domestic Violence Officer

Unrestricted Funds

Throughout the year, unrestricted dollars supported organizations with emerging needs, bridged gaps in funding and supported start-up costs.

The Board of Directors for the Northwest Arena has been planning and fundraising for TheZone, a unique attraction that will provide indoor play space for toddlers through pre-teens. Prior to the pandemic, dollars were raised to build an addition to the 20-year-old facility that will accommodate the build out of TheZone. In 2021, the Foundation's Board committed to funding for this emerging project that will enhance the experience of local residents and visitors alike.

"We recognize the need for local children and families to have access to high quality and safe indoor play spaces, especially during the winter months," shared Tory Irgang. "TheZone is a true community effort with many partners and an active local fundraising effort."

Project Crossroads, a long-time partnership between Family Service of the Chautauqua Region and the Jamestown Police Department, had a funding gap that threatened its continuation in 2021. This unique approach brings a law enforcement officer together with an advocate to support nearly 1,000 victims of domestic violence and sexual assault each year.

According to the Jamestown Police Department, ongoing funding through the Office of Violence Against Women will support this community-based approach to raising awareness, referring those directly impacted to services, and utilizing a comfort dog.

With the Foundation's support, The Resource Center was able to establish a school-based healthcare center at Washington Middle School in Jamestown. When fully operational, this new site will serve 500 students in grades five through eight.

The evidence shows that school-based health centers increase access to care, improve health outcomes, and increase academic achievement for participating students.

According to Denise Jones, The Resource Center executive director, the site at Washington Middle School will be self-supporting through insurance billing, just like the long-time site at Jamestown High School

"This center focuses on many aspects of health that include, but are not limited to, asthma control, head injury, chronic illnesses, behavioral health and dental," said Denise.

CHAUTAUQUA REGION

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2021 Unrestricted Funds

Alice W. Sandberg and Walter B. Sandberg Fund

Axel W. Carlson Memorial Fund

Axel W. Carlson Union Gospel Mission Fund

Board, Member, Staff Fund

C. Malcolm and Jeanette M. Nichols Community Service Fund

Carl M. Hanson and Ann M. Lawson Fund for the Region

Clarence E. & Marguerite S. Culver Fund for the Region

Dorothy Brooks Fund

Edwin L. Danielson Community Service Fund

Emil M. and Gertrude E. Johnson Fund

Francis E. Jenkins and Phyllis D. Jenkins Community Fund

Fund for the Region

Gordon F. and Jeanette J. Carlson Community Fund

Harold E. and Elizabeth Adams Johnson Fund

Helen F. Granger and Molly Ottaway Community Service Fund

Ingrid M. Dawson Memorial Fund

Isabelle C. Erickson Community Service Fund

Jack and Isabelle Kahler Memorial Fund

James J. Schrantz Memorial Fund

Jamestown Visiting Nurses Association Fund

John L. and Carole W. Sellstrom Family Charitable Fund

Joyce I. Manchester Fund

|udith|. Anderson Family Fund

Kenneth and Lois Strickler Community Service Fund

Lillian Brink Fund

Mabel Anderson Fund

Marine Midland Bank Fund

MCL Community Fund

Michael A. and Ann Mason LaMancuso Community Service Fund

Morgan O. Doolittle Jr. and Mary T. Doolittle Memorial Fund

Northwest Savings Bank Community Service Fund

Ralph C. Sheldon and Mildred Bloomquist Sheldon Fund

Randy and Diana Ordines Fund

Reg and Betty Lenna Fund

Ruby H. Holmberg Fund

Ruth R. Olson Memorial Fund

Sally and Chuck Swanson Community Fund

Simon Goldman Memorial Fund

The Patrie-Leamon Fund

The William and Helen Long Fund

Thomas A. Buttafaro Community Service Fund

Thomas H. Brown Fund



Although Francis and Phyllis Jenkins traveled extensively throughout their lifetimes, the Chautauqua region was always home. It was where they grew up, raised their children, and spent their time volunteering for a number of community organizations.

Together, they made the decision to provide for their community by including an unrestricted gift to the Community Foundation in their estate plans.

Following their passing, Francis in 2019 and Phyllis in 2020, their plans were realized and this fund was finalized in 2021.



Candace Dickinson dedicated the majority of her professional life to helping parents and children in her roles as an educator and family counselor.

Field of Interest Funds

Field of interest funds provide a unique opportunity for donors to support the community's changing needs within specific sectors or around issues they care about. The Foundation administers field of interest funds that support animal welfare, arts, education, the environment, and youth development.

The Candace L. Dickinson Better Parenting Skills Fund was established by her family and colleagues in 2006 to honor her life's work.

Since then, this field of interest fund has awarded grants to organizations providing family education courses and skills training to help improve the lives of both children and their families.

Through its Parents as Teachers Program, Jamestown Community Learning Council has successfully partnered with the YWCA of Jamestown for over 10 years to provide resources to pregnant and parenting teenagers. The Teenage Education and Motherhood (TEAM) Program helps participants finish high school, navigate supportive services, and make a plan for the future, whether that includes higher education or entering the workforce.

In 2021, a grant from the Candace L. Dickinson Better Parenting Skills Fund helped continue an expansion of the Parents as Teachers + Linkages Until Success Program, which meets the needs of teen mothers and their children after completing high school.

According to Krista Camarata, Jamestown Community Learning Council executive director, PAT PLUS was launched in 2018 to address the barriers to selfsufficiency that teen parents often face such as, transportation, childcare, and housing issues.

"The expansion of this program provides long-term support for the family unit until the parent achieves their educational and employment goals," Krista said.

Over the past four years, Jamestown Community Learning Council has impacted 43 individuals through this program.

"In addition to the positive outcomes for parents, we are also seeing positive outcomes for the children," said Krista.

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2021 Field of Interest Funds

Amicae Fund for the Prevention of Domestic Violence

Axel W. Carlson Memorial Fund for Field of Interest

Candace L. Dickinson Better Parenting Skills Fund

Carl Yngve and Lucille Adamson Fund

Charles Bradley Carlson Memorial Fund

Charles Gesing Soccer Fund

Chautauqua Breast Health Education Awareness Fund

Donald R. Swanson Memorial Fund

Drs. Laha Parks & Playgrounds Fund

Edwina N. Holmquist Memorial Fund

Falconer Region Community Fund

Future Fund

Greater Jamestown Leadership Fund

H. James Abdella Fund for the Arts

John Edward McLaughlin Family Fund

Joyce Richards Shelgren Trust to Assist Children

in Need or with Disabilities

Karl Peterson Field of Interest Fund

Karl Peterson Unrestricted Fund

Leo Squinn Memorial Fund

Lynn Foundation

Margaret E. Olson Memorial Fund

Michael Myles Youth Sports Fund

Michelle Kay Reynolds Memorial Leukemia Fund

Miles & Gloria Lasser Community Insight Fund

Rollin A. & Annie P. Fancher Fund

Russ Diethrick Fund

Sarita Hopkins Weeks Fine Arts Fund

Stephen Pangborn & Willie Hayes Memorial Cancer Fund

The Blossom Fund

Urban Forestry Fund

W.C.A. Care and Share Fund

Michael Myles Youth Sports Fund

An active volunteer in the Bemus Point community, Michael coached youth baseball and football teams for over 10 years.

In 2019, after a courageous battle with colon cancer, he passed away. His family looked for a way to not only honor his memory but continue his legacy of working with youth.

Last year, they created this fund to grant dollars to youth sports programs.





"There are so many things we hope to do throughout the community in Bannon's memory. The Community Foundation gives us opportunities to get involved and enhances our outreach."

Junie Eimiller

Donor Advised Funds

For every charitable interest a donor has, there are a multitude of ways for them to give back. For those that wish to be directly involved in making grants, donor-advised funds are perhaps the most direct way to achieve their philanthropic goals.

In addition to providing donors an immediate tax benefit and access to the Foundation's investment services, our staff works hand in hand with fund advisors wanting to understand community needs and issues.

In recent years, donor-advised funds have been the go-to funding source for individuals who want to make a lasting community impact after an unforeseen event.

"During the initial onset of COVID-19, some of our very first calls were to fund advisors who were looking for ways help," said Lisa Lynde, donor services officer. "We worked closely to pass along information about the community's greatest unmet needs and were able to distribute grants quickly."

In the year that followed, fund advisors have directed grants to St. Susan Center, The Salvation Army and 5 Loaves and 2 Fish Outreach Ministry who continue working directly with those impacted by the pandemic.

Donor-advised funds have also attracted individuals like Junie Eimiller, who wish to carry on the charitable nature of a loved one.

On May 9, 2021, Junie's son, Bannon, was killed while riding a skateboard along Route 430 in the Town of Ellery. After his death, her family received numerous contributions from friends and family to do something good in Bannon's name.

"We talked about it and thought that these dollars would be a better representation of his strengths and qualities if we partnered with organizations and causes that Bannon would have found joy in giving back to," Junie said.

As an avid skateboarder, Bannon looked forward to the construction of a local skate park in Jamestown and his family wanted to find a way to incorporate his memory into the project.

Recently, they directed the first grant award from The B.E. Strong 716 Fund to the City of Jamestown to install a bench at the skate park in Bannon's name



Local volunteers pack food to be distributed to neighbors in need throughout the Clymer community.

2021 Donor Advised Funds

B.E. Strong 716 Fund

Charles and Anne Jacobson Fund

Chautaugua County Assistance Fund

David and Lillian Anderson Family Fund

Denise Faulkner Memorial Fund

Dennis and Rebecca Brumagin Fund

Donald and Rosalie Pembridge Fund

Dr. Clifford and Ida B. Bauer Fund

Edwin J. and Katherine M. Hegstedt Memorial Fund

Gerald W. Hamme Memorial Fund

Harold and Debbie Andersen Memorial Fund

for Visual and Performing Arts

Jamestown Center City Development Corporation Ice Arena Fund

leffrey L. Bloomquist Memorial Fund

Judith S. Smith Community Service Fund

Kallie's Krusade Fund

Lorin Hunt Music Fund

Marian M. and Roger M. Gilbert Fund

Nora Stronz Alexander Family Fund

Randall S. Peterson Memorial Fund

Rex & Micki McCray Family Fund

Robert A. Liebers Memorial Fund

Rosanne Stark Fund

The Carlson Family Fund

The Jaxxon Fund

Willard W. and Florence G. Cass Family Fund

With All Your Heart, The Marley V. Swanson Memorial Fund

Robert A. Liebers Memorial Fund

After Rob Liebers was diagnosed with a rare form of cancer in 2018, those closest to him put together a virtual race to raise dollars to support him and his family.

After Rob passed away in 2019, the virtual event, #runningforrob, continued to grow. The proceeds support this fund in Rob's memory and grant dollars to the causes and organizations that were important to him.

"The big thing about Rob was the type of person that he was. He had a huge heart and loved running, as well as, his community."

Cristin Hockenberry





"When Brian passed away unexpectedly, we decided a wonderful way to honor him would be to establish a fund in his name to ensure opportunities for future interns."

Kristan McMahon Robert H. Jackson Center Executive Director

Designated & Agency Funds

Following a tragic accident with his five-month-old son, AJ, Aaron Lee and his family developed a deep connection with the trained and caring professionals at Child Advocacy Program.

In 2021, he created The AJ Strong Fund, a designated endowment that will annually grant dollars to Child Advocacy Program.

"This organization has been very near and dear to me and my family," Aaron said. "It's important to me to make sure they have everything they need to be able to support children and families in the future."

The Child Advocacy Program provides supportive services to families who have experienced child abuse allegations or other traumatic situations. Some of the services offered include advocacy, counseling, and prevention education. Staff works in collaboration with Chautauqua County's multi-disciplinary team to conduct forensic interviews and medical exams.

"Having support in the community helps us expand and enhance our services to meet the changing needs of children and families in our care," said Beth Oakes, Child Advocacy Program executive director.

The Robert H. Jackson Center has established several agency endowment funds to support the organization.

The Brian A. Hill Memorial Fund was established by the Board of Directors to remember Brian, a summer intern who passed away unexpectedly. It will annually grant dollars to the Center for its student internship program.

"A generous gift from a donor enabled us to pay for Brian's housing while he was an intern with us, and we realized we needed to establish a permanent solution to enable any amazing person to intern with us, regardless of their resources," said Kristan McMahon, Robert H. Jackson Center executive director.

During his internship in 2019, Brian created, organized, and archived video content at the Center while working on a special documentary that honored the life and career of Stan Lundine.

"I'm really happy to be here in Jamestown at the Jackson Center putting my talents to good use at a place that is dedicated to preserving the legacy of one of the most important figures in the history of American Law," Brian said at the time.

2021 Designated & Agency Funds

A

A.W. Rappole, M.D. and Bert W. Rappole, M.D. - Nursing Professional Development Fund ${\bf AJ\,Strong\,Fund}$

Al & Marge Brown Speaker Series/Robert H. Jackson Endowment Fund

Alan Y. Cole Lectureship Endowment Fund

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ASHF/Jennie Vimmerstedt Fund

Audubon Community Nature Center Fund

Axel W. Carlson Jamestown Community College Fund

Axel W. Carlson Prendergast Library Fund

Axel W. Carlson Salvation Army Fund

В

Bereda Children's Memorial Fund

Bertha Hamilton Fund

Betty and Warren Erickson Family Fund

Brian A. Hill Memorial Fund

Busti Historical Society & Grist Mill Fund

C

C. Clifford and Sigrid Z. Peterson American Red Cross Fund

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C. Malcolm and Jeanette M. Nichols Roger Tory Peterson Institute Fund

Cappa Family Fund

Carl & Doris Hagberg Fenton History Center Fund

Carl A. Dominick, Jamestown Roofing Fund

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Chambers Family Campership Fund

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Chautauqua Center for the Visual Arts

Chautauqua County Humane Society Endowment Fund

Chautauqua County Resource Center Fund

Chautauqua Striders Track Maintenance Fund

Chautauqua Watershed Conservancy Endowment Fund

Chi Sig Remembrance Fund XEX

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Clarence E. & Marguerite S. Culver Endowment Fund

Corinthian Sailing Club Regatta Fund

Corl A. Belknap Daughters of the American Revolution Fund

Cornell Cooperative Extension Chautaugua County 4-H Endowment Fund

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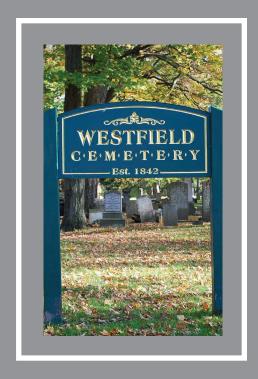
D

Dan Feather Memorial Fund Darren Manzella Lapeira Veterans Assistance Fund Diane G. Crandall Myers Memorial Library Fund

Westfield Cemetery Association Fund

The Chautauqua Region
Community Foundation
administers several designated
and agency funds to support
cemeteries throughout the
region. This unique partnership
offers perpetual protection for
highly regulated cemetery assets
while providing an annual grant to
maintain the public areas of each
cemetery.

The Westfield Cemetery
Association is the most recent organization to utilize the Foundation.



Donald F. and Crystal J. Sweeney Fund Donald West and James Wilson King Spring Concert Endowment Fund Douglas R. and Priscilla H. Robbins Fund

Dr. Bob Kochersberger Endowment Fund for the Sinclairville Free Library

Dr. Harold M. and Joyce S. Childress Fund

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Ellington Farman Library Endowment Fund

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Elmer C. & Eleanor H. Rose Salvation Army Fund Elmer C. & Eleanor H. Rose Union Gospel Mission Fund

Emil Tropp Fund for Tree of Life Evangelical Lutheran Church

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Fenton History Center Collection Support Fund

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Gerald S. Gaeta Charitable Fund

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Gratzer-Wiggers-Hansen Good Citizenship Award Fund

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Gunnard C.E. & Hanna C. Danielson Memorial Fund

for Lakewood United Methodist Church

Help For Kids Fund

Help Kids Play Youth Hockey Fund

Henrietta Ord Jones Bird, Tree, and Garden Program Fund

Herbert Star Memorial Fund

Hillcrest Baptist Church Choir Fund

Hillcrest Baptist Church Christian Education Board Fund

Hillcrest Baptist Church Fund

Hillcrest Baptist Church Mission Fund

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Area Babe Ruth World Series Committee Fund

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Jamestown High School Class of 1909 Essay Contest Award

Jamestown Sertoma Club Speech and Hearing Fund

lamestown Street Railway Trolley Car #93 Restoration Project

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Jane R. Fosberg Fund

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June H. Steele/St. Mary of Lourdes Fund

Karl Peterson First Lutheran Church Fund

Karl Peterson Lutheran Social Services Fund

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Katie Campbell Rexford Memorial Fund Kennedy First United Methodist Church Fund

Ketchy Family Fund for St. Nicholas Church

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Leland B. Ward Little Theatre Fund

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Little Lenny Cat Care Fund

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Lucille Ball Little Theatre Fund

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Our Lady of Loreto Fund

P

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Paul W. Sandberg Fund

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Pine Hill Cemetery Fund

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R. Blair McMillin Memorial Fund for Children with Diabetes

R. Blair McMillin Memorial Juvenile Diabetes Camp Fund

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R.A. and E.S. Lenna Fund Benefiting the Reg Lenna Civic Center

Ralph T. & Marian M. Campbell Fund

Ralph T. & Marian M. Campbell Fund for the Humane Society

Reachout Ministries Endowment Fund

Reg Lenna Civic Center General Endowment Fund

Reg Lenna Civic Center/Julian Wright Memorial Fund

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Rita A. Dunn American Heart Association Fund

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Stan Lundine Health Care Professional Workforce Fund

Stanley A. Weeks Charitable Legacy Fund

Stanley A. Weeks Fund

Stanley A. Weeks Mt. Moriah Lodge Tax Fund

Stanley A. Weeks/Robert H. Jackson Fund

Stateline Speedway Legacy Fund

Steven K. Miller Memorial Fund

T

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The Resource Center Kathy Seastedt "Dream On" Fund

The Resource Center Laurel Run Fund

The Resource Center Look Good Fund

The Resource Center WOW Fund

The Ruth Lundin Environmental Internship Endowment Fund

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The Spicer Family Fund Benefiting The Falconer Public Library

Tim Christenson & Don Hogan Fund for the benefit of Jamestown

Area Midget Football League & The Resource Center

Tom Fisher Endowment Fund

TRC Excellence Awards Fund

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U

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V

Veteran's Endowment Fund

Veterans Memorial Park Maintenance Endowment Fund

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W

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William Robertson YMCA Fund

William Robertson YWCA Memorial Fund

Y

YWCA Fund

Z

Zion Covenant Church of Jamestown Fund



"One of the positives of vocational studies for me, is that I did an intensive 6-month program that has allowed me to quickly enter the workforce in a market of high demand and higher paying jobs."

Austin Strong

Scholarship Funds

Panama Central School graduate, Austin Strong, literally dove headfirst into a career path that combined his love of water and welding.

"I swam in high school and took diesel mechanics while attending BOCES," Austin said. "I decided to study underwater welding because it just seemed like a natural fit for me." While attending the CDA Technical Institute, Austin studied commercial diving and underwater welding. He received a variety of scholarships from the Foundation to purchase equipment necessary for his courses.

Although the majority of the Foundation's scholarship recipients pursue higher educational degrees at colleges and universities, there is a growing number of students and Chautauqua County residents interested in job training and certificate programs.

"Throughout our region, there are unfilled jobs that pay a family sustaining wage and require training outside of a typical classroom environment," said Michelle Tambascio, scholarship officer. "In researching how other communities were addressing this gap in the workforce, we realized we have a unique opportunity to reimagine our investment in education."

In 2021, the Foundation launched its Workforce Training Scholarship Program, which is designed to accept and award scholarships on a rolling basis each month.

According to Tambascio, one of the other challenges students enrolled in a job training or certificate program faced was the varied timeline between their classes and the Foundation's general scholarship process.

"Students enrolled in programs that only ran for six weeks or didn't follow a spring or fall semester timeline were often excluded from our process," Michelle said. Funding for the Workforce Training Scholarship Program comes from the C. Malcolm and Jeanette M. Nichols Vocational Educational Scholarship Fund, an existing scholarship whose criteria promotes vocational career paths.

To date, more than \$10,000 has been awarded to both students and Chautauqua County residents pursuing careers as electricians, CNAs, plumbers and EMTs.

22

2021 Scholarship Funds

96th Highlanders Pipes and Drums Scholarship Fund

A

A. A. Amidon Scholarship Fund A.A.R.P. Jamestown Chapter #334 Scholarship Fund Abbey Rose Sadowski Memorial Scholarship Fund Agnes Home Scholarship Fund Alan L. Harding Scholarship Fund

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Allied Fire Protection Systems, Inc. Scholarship Fund Alumni Association of Mayville Schools Scholarship Fund

A Memorial Scholarship in Honor of Mr. & Mrs. J.H. Stohlbrost, Ebba Goranson, Marilyn Carlson McLain and Alberta Sandbe

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В

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Barbara O. D'Angelo Teaching Scholarship Fund Bea and Bob McKenzie Aviation Scholarship Fund

Bearach Wilcox Scholarship Fund

Bemus Point Volunteer Fire Department Endowed Scholarship Fund

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C. Malcolm and Jeanette M. Nichols Scholarship Fund

C. Malcolm and Jeanette M. Nichols Vocational Education Scholarship Fund

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Charles L. and Dorothy M. Jacobson Memorial Scholarship

Awards for Excellence in Music

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Chautauqua County Basketball Officials Board 39 Scholarship Fund

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CVCS Health Care Professions Scholarship Fund

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F

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23

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Southwestern Central School and Jamestown High School

Community Service Scholarship Fund

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Southwestern Central School Class of 1982 Memorial Scholarship Fund Southwestern Central School Class of 1983 Memorial Scholarship Fund

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In 2021, the Foundation received gifts in memory of the beloved pets of our donors who are no longer with us to benefit a variety of animal welfare charities.





Bud, Beloved Dog Burdock CoCo, Beloved Dog Crescent the Cat Diego, Beloved Cat Frenchie Jenny, Wonderful Dog Kindel, Faithful Companion Kittyman Little One Lovee Beans, Most Wonderful P MJ Poppy The Cat Smokey Tulie V



As the oldest of six daughters, Helen Nelson Dygert understood the financial difficulties of attending college in the 1940s. Her parents, Swedish immigrants with a high school education, encouraged her to enroll in an extension program through Jamestown Community College.

With their parents continued love and support, each of Helen's sisters also completed their higher education, entered the workforce, and started their own families.

Despite living apart for most of their adult lives, the sisters remained close, meeting annually for a long weekend and hosting multi-generational family gatherings every few years. They passed on the lessons of their parents and encourage their children, grandchildren and great-grandchildren to value their education, much like Carl and Viola did.



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Inspired by the life work of Supreme Court Justice Robert H. Jackson, Greg Peterson has spent the past 20 years ensuring the Jamestown native's legacy is permanently ingrained in our community.

As co-founder of The Robert H. Jackson Center, Greg dedicated countless volunteer hours to programs, special events and one-on-one interviews that captured the influence of Justice Jackson. In 2021, Greg announced his retirement from the Center's Board of Directors.

"It has been an amazing 20 years of serving at the Robert H. Jackson Center," Greg reflected.

This designated fund, which bears Greg and his wife, Cynthia's, names annually grants dollars to support the Center's mission.





Lily Melquist, Karen Volpe Preston Legacy Fund recipient, and Paul Preston

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Leslie Calimeri, local artist and Chautauqua Art Gallery owner, hosted an online community art show with work inspired by the Cathedral Oaks that once lined Third Street. She brought together nearly a dozen artists, launched a virtual gallery and sold prints, photos, jewelry and more. The artists donated proceeds from their sales to The Urban Forestry Fund, housed at the Foundation.

Since 1992, The Urban Forestry Fund has supported the planting and maintaining of trees in the City of Jamestown.



Exceptional Stars Athletics, which provides children with special needs the opportunity to participate in athletic events, donated proceeds from its annual basket raffle to the Karen Cotten Memorial Scholarship Fund.

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Bob Johnston, Jamestown Street Railway Car No. 93 project founder

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The Sheila Volk Memorial Fund was created in 1987 by members of the Southwestern Central School Class of 1986 in memory of their friend and classmate, Sheila Volk, to support graduating high school seniors who are active in the music department.

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Thank You Healthcare Heroes!

As healthcare workers continued working around the clock, often without breaks, the Chautauqua Region Community Foundation delivered a variety of items to stock snack carts and nursing stations throughout the hospital.

"We wanted to send encouragement to those working long hours to care for our friends and neighbors."

> Lisa Lynde Donor Services Officer



Our Legacy Society

Our donor services team works with individuals looking to make a lasting charitable impact. These conversations may culminate in the creation of a planned giving strategy which may name the Foundation as a beneficiary of a will, trust, life insurance policy, charitable gift annuity, or IRA.

Donors may choose to start a fund during their lifetime and enhance it with a planned gift. Other times, the donor outlines their wishes and a fund is activated at the time the planned gift is realized.

The following individuals have made this commitment by working with our staff and we are deeply grateful.

Samuel C. Alessi* Anonymous (12) Gretta Archer

David and Joyce* Axelson

Gwen Axelson

David and Christine Bartkowiak

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Mary Blair*

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Ernest and Rev. Grace Warren Allen and Barbara* Yahn Phillip "Flip" Yates*

We are grateful for the generous intentions of our donors and the expertise of the professional advisors who support our community through these charitable means.

^{*}These members are lovingly remembered for their generosity.

In 2021, the Community Foundation received distributions from the following estates:

Samuel C. Alessi – Fund for the Region & Jamestown High School Class of 1950 Scholarship

Carl and Catherine Cappa – Cappa Family Fund

Sally and Chuck Swanson – Sally and Chuck Swanson Community Fund

Mary Ann Green Olson – Jamestown High School Class of 1950 Scholarship

Elizabeth Pappas – James and Mary Pappas Trust Fund

Cloise Van Swearingen – Cloise & Doris Swearingen Memorial Scholarship

Philip "Flip" Yates – R. Richard Corbin Memorial Scholarship

Charitable Gift Annuities

A charitable gift annuity is a contract between a donor and the Community Foundation allowing them to make an immediate gift of cash or marketable securities, gaining a partial tax deduction and a fixed stream of income for the rest of their life.

Joanne Nelson is one example of a Legacy Society member who has utilized the CGA program to achieve her philanthropic goals of ensuring the organizations she supports during her lifetime will continue to benefit after her passing.

Over the years, she has worked with the Foundation to create funds that will benefit organizations that played an important role in her life and in the life of her family, including First Presbyterian Church, Zion Covenant Church, Chautauqua County Humane Society, Girl Scouts of Western New York for Camp Timbercrest and the Horton Hill Service Center.

To learn more about the CGA program, or Legacy Society, contact Lisa Lynde, Donor Services Officer at llynde@crcfonline.org or (716) 661-3390.



"The staff at the
Community Foundation
know our community well
and make it easy to invest
while making the tax
benefits clear. They do a
great job managing
investments and helping
ordinary people like me
create a lasting legacy
without having to spend a
fortune to do so."

Joanne E. Nelson

COMMUNITY FOUNDATION

Members

Our members represent diverse backgrounds, skill sets, experiences and community sectors to help guide the Foundation's grant and scholarship processes. These volunteers bring perspective to the broader work of the Foundation and are appointed to serve three-year terms.



Members of the Community Foundation General Grants Committee.

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Megan Arnone
Jamie Lee Bonfiglio
Stephanie Brown
Karen Buck
Tracy Buck
Joseph Calimeri
Yanira Castellano-Martir
Javier Castro
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Volunteers

We are grateful to the following volunteers whose time and expertise are used to guide our grant, scholarship and organizational committees, ensuring the Foundation functions at its highest capacity and in the best interest of our community.

Rebecca Allen Peggy Ambrose Kaitlin Ames Dawn Babbage Stephanie Baker Millie Ball Mark Bargar Donna Beal Leila Bell Edie Bensink Lvman Buck Bill Bush Yvonne Carlson Rose Mary Carver Deb Cliver Rachel Curtin Fllen Ditonto Rod Drake Tina Duliba

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Board of Directors



Front row from left: Rex McCray, president; Laura Otander, vice president; Lorraine Diggs, secretary; Joe Bellitto, treasurer; Peter Stark, past president. **Back row from left:** Becky Robbins, Chloe Smih, Mary Schiller, Dana Lundberg, Harold Brunacini.

Staff





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