



**MONROE COMMUNITY COLLEGE FOUNDATION  
ACTIVITY REPORT**

May 22, 2015 through August 31, 2015

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**LEADERSHIP GIFTS & PLEDGES OF \$500 AND OVER**

*Major and Special Gifts: Total for period \$807,583.00*

**\$323,574 George J. Coury Living Trust**

160,000 J.P. Morgan Chase and Co.

**150,000 The Estate of Henrietta Olsen**

50,000 Anonymous

30,000 Daisy Marquis Jones Foundation

28,868 Native American Education Foundation

16,051 Greater Rochester Summer Learning  
Association Inc.

15,090 United Way of Greater Rochester

**10,000 Altrusa International of Rochester, Inc.**

10,000 The John and Jayne Summers Foundation, Inc.

7,500 Rochester Automobile Dealers Association

5,000 Ames-Amzalak Memorial Trust

1,500 Horizons National Student Enrichment  
Program, Inc.

**General Scholarship Fund**

JPMorgan Chase and Co. New Skills at Work

**Unrestricted**

Juliane Marino Memorial Scholarship Fund for  
Student Nurses

Horizons Summer Enrichment Program

Native American Education Scholarship

Horizons Summer Enrichment Program

Horizons Summer Enrichment Program

**Altrusa International of Rochester Scholarship**

Major Gifts

Rochester Automobile Dealers Association Scholarship

Empire State Diversity Honors Scholarship

Horizons Summer Enrichment Program

*Assets for Independence Save for Success: Total for period \$10,000*

10,000 Duda Family Foundation

*STAR Power: Total for period \$38,000*

7,500 Dawn V. Borgeest '76

5,000 Cornell/Weinstein Family Foundation

5,000 Nellie & Wade Hedegard

5,000 Lisa & Richard Paulis

**5,000 Jessica & Tyler Savage**

**2,500 Cheryl Brunelle**

2,500 Dirk Bernold & Karen Hatch

1,000 Mrs. Beverly A. French

1,000 Sandy Parker & Dutch Summers

1,000 Zweigle's Inc./Julie Camardo-Steron

**500 Theresa Bowick '01**

*(**Bold type** above denotes new donors and new members of the President's Circle)*

*(Includes gifts and pledges through 08.31.15)*

**500 Ann L. Burr**  
 500 Elaine Michael  
 500 Jodi Oriel '93  
 500 Sharon Kelly Sayers '72

*Annual Fund: Total for period \$218,461*

\$33,533 Monroe Community College Association

**20,000 Gene Haas Foundation**

18,640 Max & Marian Farash Charitable Foundation/  
         Howard Konar  
 9,000 NYS Police Troop E Golf Tournament  
 8,000 ABVI (Association for the Blind and Visually Impaired)

**7,000 Rachel L. Nolan**

**7,000 Verizon Wireless**

5,000 Mary & George Bauer  
 5,000 Mr. John L. DiMarco, II  
 5,000 Houghton College  
 5,000 Le Moyne College  
 5,000 Max A. Adler Charitable Foundation, Inc.

**5,000 Peter B. Heinrich Management Trust**

5,000 Stuart R. Porter

5,000 Roberts Wesleyan College

5,000 The College at Brockport

5,000 Syracuse University

5,000 Utica College

**4,500 Harris Foundation**

3,000 Ken & Pamela Hines  
 2,500 Mr. '73 & Mrs. Anthony H. Lambiase  
 2,500 Joanne & John T. '71 Smith  
 2,500 Charis & Richard S. '68 Warshof  
 2,500 Dr. Alice Holloway Young  
 2,318 Dr. Kimberley D. Willis '91

2,000 Jean & Dick Ottalagana

1,690 GEICO

1,600 Mary D. Seebach

1,500 Dr. Peter A. Manzi

1,405 Patti Soltys '72

1,400 Sandy Shatzel

1,000 Lisa R. & John P. Baron

1,000 Essie Calhoun-McDavid & Bernard McDavid

1,000 Mr. Jack Cannon

1,000 Mary Ellen Clark

1,000 Alan J. Cobb '68

1,000 Lauren Dixon

1,000 Don '71 & Nancy Jeffries

1,000 Howard Konar

1,000 Dr. Barbara & John Lovenheim

MCC Student Association Student Leadership, Athletic Excellence & ETS Endowed Scholarships

**Gene Haas Scholarship**

Farash Foundation First in Family Scholarship at  
 Monroe Community College, MCC Annual Fund  
 Andrew "AJ" Sperr Endowed Scholarship Fund  
 Vision Screening for Children Attending the Be A  
 Healthy Hero Summer Camp

**General Visual & Performing Arts  
Department Scholarship**

**Alumni Activities Fund**

General Scholarship Fund

MCC Annual Fund

Alumni Activities Fund

Alumni Activities Fund

Empire State Diversity Honors Scholarship

**The Hattie H. Harris Endowed Scholarship**

Stuart R. Porter and Joyce R. Porter Endowed  
Scholarship Fund

Alumni Activities Fund

Alumni Activities Fund

Alumni Activities Fund

Alumni Activities Fund

**MCC Restricted Fund**

Pamela and Kenneth Hines Scholarship

Tony Lambiase, Jr. Firefighter's Scholarship

MCC Annual Fund

MCC Annual Fund

MCC Annual Fund

General Visual & Performing Arts  
Department Scholarship

MCC Annual Fund

Alumni Activities Fund

The Snowball Scholarship for Service-Learning  
 Athletic Excellence Scholarship Fund/ General  
 Scholarship Fund

Patricia Flynn Soltys Endowed Scholarship

MCC Annual Fund

MCC Annual Fund

MCC Annual Fund

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1,000	Carol & John Matteson	MCC Annual Fund
1,000	Joanna S. McCarthy & Family	MCC Annual Fund
1,000	Denise & Leonard Redon	MCC Annual Fund
1,000	Mr. Neil F. Rohrer	MCC Annual Fund
1,000	James & Daria Shaw	MCC Annual Fund
1,000	Ms. Naomi Silver	MCC Annual Fund
1,000	Sodexo/Monroe Community College Association	MCC Annual Fund
1,000	Gary '76 & Catherine Squires	MCC Annual Fund
1,000	James M. Sydor '71	MCC Annual Fund
<b>1,000</b>	<b>University of Rochester Medical Center</b>	<b>Rochester Parent Network</b>
1,000	Lori Van Dusen and Ronald Boillat	MCC Annual Fund
<b>1,000</b>	<b>Dr. Andrea C. Wade</b>	<b>MCC Annual Fund</b>
1,000	Jim & Bev Ward	MCC Annual Fund
1,000	Mr. & Mrs. Emerson U. Fullwood	Emerson U. and Vernita Fullwood Scholarship
825	Dale '70 & Nancy Mallory	ETS Endowed Scholarship Fund
550	Dr. & Mrs. Jeffrey P. Bartkovich	ETS Endowed Scholarship Fund
500	Barbara Christoff	ETS Endowed Scholarship Fund
<b>500</b>	<b>Mr. Donald D'Alessandro '73</b>	<b>MCC Annual Fund</b>
500	Richard & Sheila Degus	MCC Annual Fund
<b>500</b>	<b>James A. Donahue '74</b>	<b>MCC Annual Fund</b>
500	Lance & Hope '84 Drummond	General Scholarship Fund
500	Dan & Jane '68 Garr	Jane L. Garr Endowed Nursing Scholarship
<b>500</b>	<b>Gates Automotive Center</b>	<b>ETS Endowed Scholarship Fund</b>
500	Anne M. Kress & Edward B. Davis III	General ESOL & Transitional Studies Department Scholarship
500	Alan & Janice Resnick	MCC Annual Fund
<b>500</b>	<b>Anonymous</b>	<b>Officer Daryl Pierson Memorial Scholarship</b>
500	The Hattie Harris Foundation	The Hattie H. Harris Endowed Scholarship
<b>500</b>	<b>Myron Thompson</b>	<b>MCC Annual Fund</b>
500	Nancy & Kenneth '77 Mihalyov	MCC Annual Fund

*(**Bold type** above denotes new donors and new members of the President's Circle)  
(Includes gifts and pledges through 08.31.15)*

## DEVELOPMENT

### Alumni

- Under the leadership of **Lee Patterson '70**, selected four outstanding alumni for induction into the 2015 MCC Alumni Hall of Fame:
  - Mr. Todd K. Baxter '10**, executive director, Veterans Outreach Center, Inc.
  - Mr. Stephen Pasquarella '83**, president, Vincent Associates
  - Ms. JoAnne M. Ryan, RN, MHA '79**, president and CEO, Volunteers of America Upstate New York
  - Dr. Kimberley Willis, '91**, registrar, SUNY Geneseo
- Mailed a "welcome" letter and alumni benefits card to our 2,550 newest alumni.
- Produced a "welcome future alumni" postcard which was distributed to new students during orientation sessions held prior to the beginning fall semester.
- Produced print materials and communiqués promoting Alumni Week and Homecoming 2015 including over 5,000 postcards to alumni and donors.

- Kicked off Alumni Week and Homecoming with the Golf Classic and Luncheon honoring MCC Vice President **Dr. Jeffrey P. Bartkovich** (retired). Raised \$10,500 to support the Educational Technology Services Endowed Scholarship Fund.
- Planned **Verizon Career Days at MCC**. Verizon, sponsor of Alumni Week and Homecoming, will be on campus to connect with students interested in learning about careers available with Verizon Wireless.

#### *Annual Fund*

- Delivered the Blue Line segment direct mail piece enabling 990 past donors to meet the deadline of June 30 for inclusion in the Annual Report's "Honor Roll of Donors."
- The 2014-2015 annual campaign exceeded its budgeted goal by 20.8 percent raising \$756,209 toward a campaign goal of \$626,097.
- In partnership with **Vice President Holmes and the Athletics Department**, launched the first wave of crowd fundraisers - women's and men's soccer and volleyball.

#### *Major Gifts*

- Established the Gene Haas Scholarship with a \$20,000 gift from the **Gene Haas Foundation**. This scholarship will support students enrolled in MCC's precision tooling and machining certificate and degree programs and help strengthen the pipeline of trained employees entering this highly viable career pathway.
- Created the Altrusa International of Rochester Scholarship with a gift of \$10,000 from **Altrusa International of Rochester, Inc.** Altrusa supports various women's initiatives and the local chapter has a special focus on women in transition. Their scholarship will support students with unique financial challenges so that they can stay in school.
- Hosted several donors and prospects for visits to Horizons at MCC, including **The Wilson Foundation, Harris Corporation, Marie '74 and Joe Merenda, and Mary Seebach**.
- Invited supporters of the Be a Healthy Hero Summer Camp to visit the program and meet the campers. Guests included the **Greater Rochester Health Foundation**, John Harris from the **Glover-Crask Charitable Trust, Mayor Lovely Warren**, and program coordinators at the GRHF partner schools represented at the camp.
- Submitted proposals to **First Niagara Bank** for the World of Inquiry School College Readiness program, **Gene Haas Foundation** for the Gene Haas Scholarship, **Rochester's Child** for the Richard M. Guon Childcare Center, **Schott USA** and **Lockheed Martin** for MCC's optics program, and **Iberdrola USA** for Dreamkeepers.

#### *Planned Giving*

- Received an estate gift from the **George L. Coury Living Trust** in the amount of \$323,574 for general scholarship support.
- Accepted a bequest gift of \$150,000 from the estate of **Henrietta K. Olsen** for unrestricted support. We expect to receive an additional \$75,000 from this estate later this year.

#### *STAR Power*

- Co-Chairs **Flor Colón** and **Kathy Pavelka** hosted a successful reception at the home of **Lori Van Dusen** on June 2.
- The Co-Chairs hosted a second successful reception at the home of **Lauren Dixon** on September 20.
- Student and alumni speakers at each reception inspired new gifts and pledges totaling \$112,900, helping STAR Power achieve its' goal of raising \$100,000 to create and endow the STAR Power scholarship.

## EXECUTIVE OFFICE

### *Board Governance*

- Under the leadership of **Sergio Esteban**, chair, the Board Governance committee successfully completed the identification and selection of three new Board Members: **Julie Carmardo-Steron**, **Bob Duffy '68/'75**, and **Ron Mead**.
- Many thanks to Board Governance committee members who were actively engaged in the process including **Sergio Esteban**, **Emerson Fullwood**, **Don Jeffries '71**, **Diana Lauria**, **Jay Popli**, **Len Redon**, **John Smith '71**, **Rich Warshof '68**, **Donna Wenk**, **Jeremy Wolk**, and **Phil Yawman**.
- **Julie Carmardo-Steron** and **Bob Duffy '68/'75** participated in new member orientation followed by a walking tour of the Brighton Campus on September 10 with **Jeremy Wolk**, **Sergio Esteban** and members of the Foundation staff.
- Board Governance Chair **Sergio Esteban** and **Diane Shoger** met on September 10 to confirm committee goals, membership and recruitment cycle for 2015-2016.

## FINANCE DEPARTMENT

### *Finance/Audit*

- Finalized financial statements for the ten months ending June 30, 2015, and reviewed at the Finance Committee on August 12 with **Scott Kogler**, Treasurer.
- Held Audit Committee meeting to discuss scope on September 15 with **Marty Birmingham**, Audit Chair and **EFP Rotenberg**, Auditors.

### *Investment*

- Reviewed quarterly performance as of June 30, 2015, at the Investment Committee meeting held on August 12 with **Jim Shaw**, chair. Guests via telephone, **Gary Price** from **Fund Evaluation Group (FEG)**, presented and reviewed portfolio and quarterly performance.

### *Scholarship*

- Transferred \$595,218 to the college to support scholarships and program funds, bringing the total support to \$1,920,704. This represents a 7% increase from the September 2014 transfer.
- Made offers to applicants in Scholarships Online for the following:
  - The Mary and Ted Freeman Endowed Scholarship
  - The Babitz Family Endowed Scholarship
  - The Ann and Helen Laughren Memorial Endowed Scholarship Fund
  - Ann Laughren Memorial Endowed Scholarship
  - Jack G. Lubelle Endowed Scholarship
  - Max Lubelle Memorial Endowed Scholarship Fund
  - Rebecca Glick Lubelle Memorial Endowed Scholarship Fund
  - Farash Foundation First in Family Scholarship at Monroe Community College
  - D. Robert Nicholson Scholarship Endowment
  - Gilbert J. Hatch Endowed Scholarship Fund
  - The Fannie and Sam Constantino First Generation Endowed Scholarship Program
- New Scholarships/Programs
  - Altrusa International of Rochester Scholarship
  - Gene Haas Scholarship
  - Pamela and Kenneth Hines Scholarship
  - General ESOL & Transitional Studies Department Scholarship

## DONOR ENGAGEMENT DEPARTMENT

### *Public Relations and Communications*

- Mailed the *Foundations* Summer 2015 issue.
- Developed content for the 2014-2015 Annual Report. (Report to mail in October.)
- Conducted Healthy Heroes Summer Camp media tour in partnership with Tipping Point Media (agency of record for the **Greater Rochester Health Foundation**).
- Produced four e-newsletters.
- Media activity:
  - Bright Spot: Carballada Scholars, 13WHAM, June 9, 2015.
  - **JPMorgan Chase** New Skills at Work gift announcement, *Rochester Business Journal*, June 12; also covered by *Community College Week*.
  - "She helps donors share their passion," **Diane Shoger** profile featuring interviews with **Dan Burns** and **Sandy Parker**, *Rochester Business Journal*, June 26.
  - Healthy Heroes Summer Camp highlighting the **Greater Rochester Health Foundation** and **Glover-Crask Foundation**, WHEC, WROC, Time Warner Cable News, July 21.
  - **New York State Police** Gift to A.J. Sperr Scholarship, *Democrat and Chronicle* and WHAM-1180, August 21.

### *26<sup>th</sup> Annual Salute to Excellence*

- Secured **Naomi Silver** of Rochester Community Baseball as Chair.
- Confirmed that the **Rochester Greater Health Foundation** will receive the Salute to Excellence.
- Date is Thursday, November 19, 2015 at the Joseph A. Floreano Rochester Riverside Convention Center.
- Produced and mailed Save the Date cards.
- Received underwriting commitments from:
  - \$15,000 **The Iberdrola USA Foundation, Inc.**
  - \$10,000 **Dixon Schwabl**
  - \$ 5,000 **CMI Communications**
  - \$ 5,000 **Cannon Industries**
  - \$ 5,000 **The DiMarco Group**
  - \$ 2,500 **CloudDOCX/John Smith**
  - \$ 2,500 **Excellus BlueCross BlueShield**
  - \$ 2,500 **LaBella Associates, D.P.C.**
  - \$ 2,500 **Rochester Institute of Technology**
  - \$ 1,200 **Mary Ellen Clark**
  - \$ 1,200 **Rochester Community Baseball**

### *18<sup>th</sup> Annual Gold Star Gala*

- Secured **Catherine** and **Gary Squires** '76 as Committee Chairs.
- Secured **Lauren Dixon & Mike Schwabl** and **Lori Van Dusen & Ron Boillat** as Honorary Chairs.
- Date is Saturday, April 30, 2016 at The Country Club of Rochester.

### *32<sup>nd</sup> Annual Scholarship Open*

- Hosted an underwriter appreciation event at Oak Hill featuring a golf lesson.
- Hosted a sold-out tournament at The Country Club of Rochester on Monday, June 22. Netted \$120,000.
- Raised \$44,340 for scholarships at the live scholarship call hosted by **Al Casey** and **John Smith**.
- Thanked tournament chairmen **Jay Popli** and **Tony Soprano** for their exceptional leadership.
- Developed and sent a survey to guests.

- Selected Monday, June 27, 2016 at Oak Hill Country Club for 33<sup>rd</sup> Annual Scholarship Open.
- Committee chairs are **Tony Soprano** and **Phil Yawman** for 33<sup>rd</sup> Annual Scholarship Open.

**OBJECTIVES**  
**October - December 2015**

**DEVELOPMENT DEPARTMENT**

*Alumni*

- Complete Alumni Week and Homecoming activities with more than \$25,000 in unrestricted support for the Annual Fund.
- Engage over 1,500 alumni, students and friends in Alumni Week and Homecoming events and raise funds in support of student scholarships. Promote and acknowledge event sponsors: **Verizon Wireless, GEICO, MCC Association, Sodexo, MCC Bookstore** and more.
- Roll out the second wave of crowd fundraisers to swimming and diving, basketball, optics alumni and Engineering Leadership Council club.
- Induct four alumni into the Alumni Hall of Fame; produce videos, secure table sales.
- Identify and cultivate alumni prospects with campus tours and personal visits.
- Continue to direct alumni to [www.mccalumnibenefits.com](http://www.mccalumnibenefits.com) at regular intervals.

*Annual Fund*

- Deliver e-invitations to 2014-2015 annual fund donors of \$1,000 or more to the President's Circle Reception to be held on Wednesday, October 21, at the Genesee Valley Club.
- Recognize President's Circle and President's Circle of Honor donors in the 2014-2015 Annual Report and at the President's Circle Reception.
- Deliver the leadership solicitation to approximately 1,000 leadership donors and develop the end-of-year direct mail piece targeting 3,000 prospective donors.
- Continue to promote the \$2,500 President's Circle of Honor giving circle.

*Development and Major Gifts*

- Submit proposals to **Goldman Sachs Gives Community College Fund** for an endowed scholarship to support students with financial need and to the **Davenport-Hatch Foundation** for kitchen renovations at the Richard M. Guon Childcare Center.
- In partnership with **Mike Zimmer** of Xerox Corporation and Greg Connors & Tom Ferris, Connors and Ferris LLP, host a reception to raise at least \$50,000 for the Dreamkeepers program to provide emergency aid grants to MCC students. These funds will match a gift made by **Robin '80 and Tim '80 Wentworth** earlier this year.
- Prepare an annual update to the **Corning Incorporated Foundation** in preparation for their annual visit to MCC's optics program.
- Submit proposals to the **Schott USA Foundation** and the **Lockheed Martin Foundation** to support high school optics dual credit partnerships.
- Host a prospect breakfast with **President Kress** on November 6, 2015.

*Planned Giving*

- Prepare copy for the Winter 2016 edition of *Ideas* planned giving newsletter.

## EXECUTIVE OFFICE

### *Board Governance*

- Finalize Board Governance Committee members for 2015-2016 and schedule first planning meeting.
- Continue building BoardMax reference library and utilizing more features to support the work of the Board and Committees.

## FINANCE DEPARTMENT

### *Finance/Audit*

- Finalize financial statements for the twelve months ending August 31, 2015.
- Prepare all schedules/workpapers for upcoming Audit to begin on September 29.
- Complete VSE report.

### *Investment*

- Quarterly performance as of August 31, 2015.
- Work with **Fund Evaluation Group (FEG)** for end of fiscal year reporting, in preparation of Audit.

## Donor Engagement Department

### *Public Relations and Communications*

- Support communications for Alumni Week and Homecoming 2015.
- Produce the 2014-2015 Annual Report.
- Support communications for the Salute to Excellence and MCC Alumni Hall of Fame induction.
- Produce and distribute monthly e-newsletters.

### *Gold Star Gala*

- Determine theme for 2016.

### *Scholarship Open*

- Establish meeting schedule for 2016.

### *Salute to Excellence*

- Mailed Save the Date.
- Produce Hall of Fame videos.
- Secure underwriting support.