

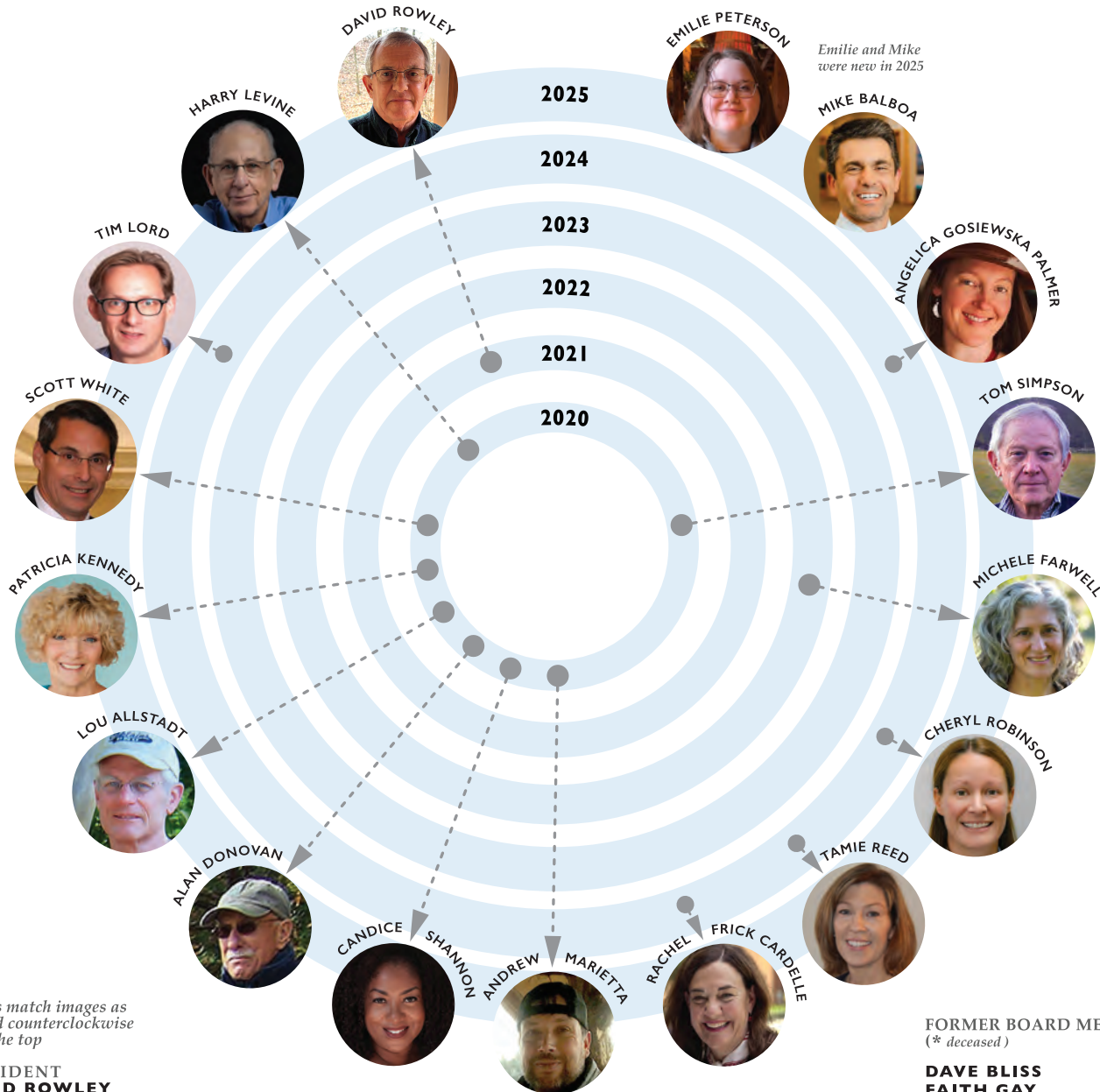


ANNUAL
REPORT
2025



COMMUNITY
FOUNDATION
OF OTSEGO
COUNTY

A BRIEF HISTORY OF THE CFOC BOARD, 2020-2025



Names match images as viewed counterclockwise from the top

PRESIDENT
DAVID ROWLEY
Retired School District Superintendent; Edmeston, Oneonta, and Stamford, CSD

PAST PRESIDENT
HARRY LEVINE
Retired real estate developer; former President, Otsego Land Trust; former President, Princeton NJ Public Library

VICE PRESIDENT
TIM LORD
Co-Founder and Co-ED of the Dream Yard Project, a Bronx-based arts/social justice pedagogy organization

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Research scientist; former President, The Brookwood School

ANDREW MARIETTA
The Clark Estates; member, Otsego County Board of Representatives

RACHEL FRICK CARDELE
Career in Education; Ph.D., Pennsylvania State University

TAMIE REED
Director, Otsego County Office for the Aging

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President and CEO, NYCM Insurance

MICHELE FARWELL
Former ED, The Butternut Valley Alliance; former member, Otsego County Board of Representatives

TOM SIMPSON
Retired Director of Finance and Administration in the legal field; Trustee of The Glimmerglass Festival; Board Member, Musica Viva NY

ANGELICA GOSIEWSKA PALMER
Social practice performance artist and accounting consultant; runs Green Circle Consulting, and The Telegraph School

MIKE BALBOA
Chief Financial Officer, Femimore Asset Management

EMILIE PETERSON
SUNY Oneonta student intern

Emilie and Mike were new in 2025

FORMER BOARD MEMBERS
(* deceased)

DAVE BLISS
FAITH GAY
GARY HERZIG
DONNA JOHNSON
SARAH MANCHESTER
JIM SEWARD*
ROBERT SCHLATHER*
PATRICIA SMITH

FORMER SUNY ONEONTA STUDENT INTERNS
JANELLE LEWIS
OWEN ROMANICK
CAROLINE SHAVER

STAFF IN 2025

JEFF KATZ
Executive Director
JOANNE TOBEY
Director of Development
MELINDA MCTAGGART
Administrative Assistant

For more information on staff and directors please visit:
cftotsego.org/staff-board-of-directors

LETTER FROM THE PRESIDENT AND EXECUTIVE DIRECTOR



PRESIDENT
DAVID ROWLEY

Our 7th year was another year of steady growth in our capacity to have a positive impact on the quality of life in Otsego County. Your incredible support has made this possible and we are sincerely grateful you continue to share and embrace our mission.

Every new year brings new challenges, and this year we are tasked with recruiting a new Executive Director to replace Jeff Katz. Jeff has done an excellent job leading CFOC over the past 4+ years and he will surely be missed. The search process is underway and the Board of Directors is confident we will engage a new Executive Director in a timely manner and provide a smooth transition.

We remain committed to creating positive change in Otsego County by working with individuals, families, foundations, community organizations, and businesses. I am confident our growth will continue and we will be even more impactful. As always, your support remains the key to our success, and we look forward to working with you as we embrace our 8th year of operation.

Dave



EXECUTIVE DIRECTOR
JEFF KATZ

Building a healthy and sustainable organization takes planning. Our goal has always been to build a new entity for Otsego County that will last, and give our donors the assurance that we are here to stay to address the needs of our county. With our eye on how CFOC can best serve Otsego's needs, and make sure our donors' goals are realized, we have created something that does not depend on an individual to thrive, but on a healthy team, with a staff, Board of Directors, and volunteers making sure that CFOC is in the best position to serve our community.

That's not to say that individual people aren't important, or that they won't be missed, but we have built an organization that doesn't depend on a single person, and that's quite a wonderful story. We thank all of you for helping us write it.

Jeff

STUDENT VOICES, STUDENT CHOICES 2025

UNATEGO TAKES THE TROPHY IN 2025 STUDENT VOICES, STUDENT CHOICES CHALLENGE

On November 24, 2025, students from six schools in Otsego County presented to a panel of community leaders at the *Student Voices, Student Choices* event held at Hartwick College in Oneonta. The four-member team of Natalia Barnes, Lucy Bailey, Raegan Goodspeed, and Molly Tolson from Unatego Central School took home the trophy for their project to provide mental-health support to peers. Unatego was joined by students from Cherry-Valley Springfield, Edmeston, Milford, Morris, and the private Otsego Christian Academy, who presented on a variety of solutions they developed to address issues in their communities.

Student Voices, Student Choices is a premier program of the Community Foundation of Otsego County. Started in 2022 with four participating schools, the program has grown to include all high schools in Otsego County. Each year, six schools make ten-minute

presentations as the culmination of their projects. All schools are invited to the orientation program hosted by CFOC and Hartwick College each September. There students learn skills to identify and address challenges, enhance their public-speaking and story-telling skills, and create budgets.

Each school participating on November 24 was granted \$2,500 by CFOC to support their projects. The prizes and program were made possible by lead sponsor NYCM Insurance and additional sponsors J & S Patrick Family Foundation, Springbrook, the Mildred Parish Foundation Fund at the Community Foundation of Otsego County, Visions Federal Credit Union, Fenimore Asset Management, Strategic Financial Services, Andela Products, Delaware Engineering, Bob and Pat Hanft, and Scott and Lori White. Media sponsors were Five Star Subaru and Otsego Media.



UNATEGO



CHERRY VALLEY-SPRINGFIELD



EDMESTON



MILFORD



MORRIS



OTSEGO CHRISTIAN ACADEMY

MOHAWK VALLEY GIVES 2025

85 OTSEGO COUNTY NONPROFITS BENEFITTED FROM 2025 MOHAWK VALLEY GIVES

A healthy network of nonprofit organizations helps make life better in Otsego County. To help support our nonprofits, CFCO makes it possible for them to participate—at no cost—in Mohawk Valley Gives, an annual “giving day” to encourage fundraising. Mohawk Valley Gives was launched a few years ago by the Community Foundation of Herkimer and Oneida Counties, which is based in Utica (and thus the Mohawk Valley Gives name).



We partner with them to provide access to an online fundraising platform for our nonprofits, as well as marketing, technical, and sponsorship support.

We know that for smaller nonprofits with limited resources, investing in the tools to expand their digital fundraising power is not always feasible. We supply those tools and the training so that our nonprofits can build out this important way to raise essential support for their missions.

In our first year of offering Mohawk Valley Gives, participation exceeded expectations and has grown annually since. In 2025, our nonprofits had a banner year. More than \$355,000 was raised during the week of September 15, with giving culminating on September 19. More than 920 donors made contributions that supported 85 participating Otsego County nonprofits.

We thank the partners who make our participation in Mohawk Valley Gives possible: the Robert & Esther Black Family Foundation, the Robert & Esther Black Family Foundation at the Richland County Foundation, SUNY Oneonta, New York Central Mutual Insurance, Wayne Bank of Cooperstown, Steve Zerby Design/Build, Eva Davy, and Social Eats Cafe.



These are the 85 Otsego County nonprofits that raised \$355,000 in funds during Mohawk Valley Gives.

- A.O. Fox Hospital
- Angel Network of Cooperstown
- Bassett Medical Center
- Butternut Valley Alliance
- Butternut Valley Arts and Crafts Center
- Catholic Charities of Delaware, Otsego, and Schoharie Counties
- Catholic Charities of the Diocese of Albany
- Catskill Choral Society
- Catskills Agrarian Alliance
- Center for Agricultural Development & Entrepreneurship (CADE)
- Center for Continuing Adult Learning
- Charles N. Gordon Wildlife Rehabilitation Center, Inc.
- Cherry Valley Artworks
- Cherry Valley Community Facilities Corp.
- Community Arts Network of Oneonta
- Community Cupboard of Edmeston
- Community Foundation of Otsego County
- Congregational Church of Cooperstown
- Cooperstown Art Association
- Cooperstown Concerts
- Cooperstown Food Pantry
- Cooperstown Foundation
- Cooperstown Rotary Foundation
- Cooperstown Sports Booster Club
- Cooperstown Summer Music Festival
- Cornell Cooperative Extension of Schoharie & Otsego Counties
- Daily Bread Food Pantry, Cherry Valley
- Delaware-Otsego Audubon Society
- Family Planning of South Central NY
- Family Resource Network
- Fenimore Art Museum
- Fenimore Farm & Country Village
- Foothills Performing Arts & Civic Center
- Friends of Doubleday
- Friends of Music & Art Cooperstown
- Friends of the Oneonta Theatre
- Future for Oneonta Foundation
- Girls on the Run of Central New York
- Glimmerglass Festival
- Greater Oneonta Historical Society
- Otsego County Habitat for Humanity
- Habitat for Humanity of Otsego County
- Hartwick Food Pantry
- Hartwick Institute of Public Service
- Helios Care
- Hill City Celebrations
- Hunger Coalition of Otsego County
- Hyde Hall
- Jail Ministry of Otsego County
- Jefferson Historical Society
- League of Women Voters of the Cooperstown Area
- Little Delaware Youth Ensemble
- Milford Central School Education Foundation
- Milford United Methodist Church
- Mount Upton UMC Food Pantry
- Oneonta Community Health Center
- Opportunities for Otsego
- Origins Community Foundation
- Otsego 2000
- Otsego Area Rowing, Inc.
- Otsego Christian Academy
- The ARC Otsego
- Otsego County Conservation Association
- Otsego County Council of Senior Citizens
- Otsego Lake Association
- Otsego Land Trust
- Otsego Pride Alliance
- Otsego Rural Housing Assistance
- Pathfinder Village Foundation
- Public Policy and Education Fund
- Richfield Springs Community Center
- Richfield Springs Food Pantry
- Richfield Springs Garden Club
- Richfield Youth Sports
- Rural Health Network of SCNY
- Saturday's Bread
- Super Heroes Humane Society
- Swart-Wilcox House Museum
- The Brookwood School
- The Catskill Symphony Orchestra
- The Friends of Huntington Memorial Library
- The Gathering Place 50 Plus Community Center
- The Salvation Army of Oneonta
- The Smithy Pioneer Gallery
- Unadilla Community Farm Education Center
- Unadilla Community Food Pantry
- Upper Catskill Natural Burial Association
- Your Safe Haven

2025 AWARDS

Twice a year, in spring and fall, we open our major grant rounds. The focus of each round is determined by our group of volunteers, called the Initiatives Committee. Criteria are refined after meeting with nonprofits in the sector we have selected to support.

All applications are reviewed by the Initiatives Committee, and their recommendations for funding are passed on to the full CFOC board for approval.

In addition to these grants, CFOC provides awards from its other funds throughout the year, including donor-advised funds.



Otsego Lake research is partially funded by CFOC grants

Spring 2025 Awards Supporting the Arts in Otsego County *23 awards; \$99,975 granted*

Cherry Valley Artworks

\$3,500

Establishing a community theater program and opening play

Friends of Music and Art Cooperstown

\$2,000

Community collaboration to bring diverse musical programming to Cooperstown Central Schools

Worcester Free Library

\$1,000

Stop-motion animation class for tweens/teens

Salvation Army of Oneonta

\$5,000

Expanded free arts programs for low-income youth

The Friends of Huntington Memorial Library

\$5,000

Magical Design Development

The Worcester Wieting Memorial Association

\$1,500

Lighting and curtain upgrade

Hartwick College

\$5,000

Winter/Spring school-break camps

Orpheus Theatre

\$9,750

General operating support

Helios Care

\$7,300

Arts Bring Healing: art therapy for bereaved families

Foothills Performing Arts and Civic Center

\$5,000

General operating support

Hyde Hall

\$5,000

Support for grant writing and marketing

Butternut Valley Arts and Crafts

\$5,000

General operating support

Fenimore Art Museum

\$2,500

Public programs titled Honoring Legacies in American Civil Rights: Harriet Tubman and Romare Bearden

Klinkhart Arts Center

\$3,500

The Big Draw in Otsego County: Free public arts initiative

Cherry Valley Community Facilities Corp. (fiscal sponsor for Telegraph School)

\$3,500

Cherry Valley Koliada: a free, participatory winter arts performance

Greater Oneonta Historical Society

\$5,000

Increased staffing hours for arts events, programs, and exhibitions execution

Catskill Choral Society

\$2,000

Orchestra support

Otsego 2000

\$5,000

Glimmerglass Film Days 2025 general operating support

Oneonta Community Concert Band

\$2,050

Concert support

Richfield Springs Community Center

\$5,000

Summer art program

Little Delaware Youth Ensemble

\$4,800

Workshops, concerts, lessons

Film Otsego

\$6,575

New York Women Film Festival

Community Arts Network of Oneonta (CANO)

\$5,000

Summer and fall programming

**Fall 2025 Awards**

Supporting family and child welfare

21 awards; \$135,000 granted

The Arc Otsego

\$10,000

Essential supports fund

Unadilla Community Farm Education Center

\$5,000

Community growers project

The Salvation Army of Oneonta

\$10,000

Addressing emergent needs for low-income households in Otsego County

Bassett Medical Center

\$9,000

Bassett School-Based Health Centers Program

Opportunities for Otsego

\$10,000

Assistance with unmet basic needs

Hartwick Food Pantry

\$2,000

Relocating food pantry and improving new site

Butternut Valley Food Pantry

\$3,000

Improved nutrition

Family Legal Care

\$5,000

Free legal services for Otsego County parents and caregivers in family court

Cooperstown Food Pantry

\$8,000

Serving Otsego County's unhoused population

2025 AWARDS (CONTINUED)

Lions Club of Cooperstown, Inc.

\$10,000

Lions Club of Cooperstown's SNAP Match Program

Unatego Central School

\$4,500

Unatego Middle School/High School food pantry support

Oneonta Community Health Center

\$5,000

Oneonta Community Health Center dental and mental health programs

Saturday's Bread

\$1,000

Electrical infrastructure upgrades

Hunger Coalition of Otsego County

\$7,500

Hygiene supplies for food pantries

Catskills Agrarian Alliance

\$5,500

School-sized CSA - Schenevus Central School District

Richfield Springs Community Center

\$5,000

Food insecurity program

Family Service Association

\$10,000

Family utility and housing support

Unadilla Community Food Pantry

\$5,000

Winter Warmup Program

Catholic Charities of Delaware, Otsego and Schoharie Counties

\$10,000

Services targeting the social determinants of health for at-risk Otsego County residents

Mount Upton United Methodist Church

\$2,000

Food pantry support

Pathfinder Village, Inc.

\$7,500

"Hello Neighbor" community food delivery project

Advocates for Springfield Fund

Two awards: \$1,000

Concerted Works

\$500

Springfield Community contra dance

Town of Springfield

\$500

July 4 Parade

Greater Otego Library and Education Fund

Two awards; \$64,414 granted

Otsego Christian Academy

\$2,000

JumpStart PE

Harris Memorial Library

\$62,414

Phase I repairs and improvements

Otsego County Cemetery Restoration Fund

Six awards; \$9,400 granted



●

Martha and Paul Clarvoe Recycling Fund

Four awards; \$21,328 granted

ARC Otsego

\$14,678

ReUse Center extruded polystyrene recycling program

Otsego County Conservation Association

\$3,000

Expanded drive-through drop-off recycling of media materials



SUNY Oneonta Foundation

\$3,500

SUNY Oneonta Recycling Ambassadors Program, supporting Sustainable Move In for students

Saturday's Bread

\$150

Disposable glove recycling

●

Otsego Lake Watershed Sustainability Fund

One award; \$10,000 granted

SUNY Oneonta Foundation

\$10,000

Biological Field Station interns field assessment of Otsego Lake and its watershed for the development of an updated management plan

●

Birch Family Fund

Broad Reach Philanthropies Fund

Carol and Edward Forman Charitable Fund

Dr. E.C. Winsor Memorial Fund

Edie and Pat Yinkey Fund

Fenimore Asset Management Fund

Friends of Schoharie County Fund

Levine Family Fund

Mildred Parish Foundation Donor-Advised Fund

Otsego Refugee Resettlement Coalition Fund

Robert and Karen Schlather Fund

Schoharie County Community Foundation Fund

Edward W. Stack Family Fund

2025 DONORS

Our generous donors make it possible for us to provide grants to nonprofits doing great work in Otsego County. They also support all we do to further key initiatives, such as economic development and housing, and help us address food insecurity, children's well-being, water quality, and other pressing issues. There's much to do, and we could not do it without our community's philanthropic commitment. Thank you!

\$25,000 and above

Lou Allstadt and Melinda Hardin
Anonymous
Robert and Esther Black Family Foundation
Robert and Esther Black Family Foundation
Fund at the Richland County Foundation
Buttonwood Foundation
Martha and Paul Clarvoe
Fenimore Asset Management
Carol and Edward Forman
Bob and Nellie Gipson
Harry and Ellen Levine
Otsego County Development Corp.
Mildred Parish Foundation
The Stack Family
Doug and Rhonda Willies
Pat Yinkey

\$10,000 to \$24,999

Robert and Marcy Birch
Kathleen and Louis Busch Hager, Jr.
Alice Busch Gronewaldt Foundation
Julia Cox Cannon LLC

Eva Davy
Mary Ellen and Gates Hawn
Nancy Herman
James Jordan
Alison and Tim Lord
Ed and Terri May
James and Nancy P. Northrup
NYCM Insurance
Hudi Podolsky and Jay Bosley
Anne Putnam
Cheryl Robinson
Karen Schlather
Tom Simpson
Martha Yager

\$1,000 to \$9,999

Kathy Ales and Richard Levine
Cynthia Andela
Andela Products
Anonymous
Michael Balboa
John and Joan Brooks
Heidi Budro
Mary Lou and Carey D'Avino
Julie and Steven Davis
Delaware Otsego Corporation/
NY Susquehanna and Western Railway
Joseph Dezzi
Nicole and Gaylord Dillingham
Alan and Annie Donovan
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Drogen Foundation
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Chris and Cay Franck
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Elizabeth Harvey
Laurel and George Harvey

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Michael and Sarah Manchester
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Martha and Joseph Membrino
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William and Karen Streck
Martin and Meg Tillapaugh
Alfred and Dawn Tinger

Martha and David Vaules
Visions Federal Credit Union
Cynthia Walton-Leavitt
Scott and Lori White
Thomas and Peggy Wright



Up to \$999

Carol J. Ackerman
Carol A. Affourtit
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Victoria Andritz
Anonymous
Elizabeth Ayer & Edward J. Macaulay
Benjamin Bauer
Marguerite Beardsley
Thomas and Muriel Beattie
Richard and Anne Blabey
Jerome and Amy Blechman
David and Tina Boggs
Darragh Brady
Scott Brady
Elaine and Marc Bresee
Robert Brzozowski
Daniel Buttermann and Ana Laura Gonzalez
Andrew T. and Laurinda Cacciola
Elayne Mosher Campoli
Alberto Cardelle and Rachel Frick Cardelle
Linda Chesis and John Guiton
Peter and Vivienne Clark
William and Susanne Coleman
Dan and Carolyn Collins
Community Foundation of Herkimer
& Oneida Counties
Jeanne Conroy
David Cox
Mary Jo Cronin
Libby Cudmore
Deb and Jim Dalton
Frances V. Davis
Anne and Bart Day
James and Eileen Dean
Janice Dean
Delaware Engineering D.P.C

2025 DONORS (CONTINUED)



Up to \$999

Kathryn Demby
Paul and Christy Deringer
Karin and Hans de Waal
Maryann and Patrick Dietz
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Elaine Downing
Linda Drake
Marissa Ericson
Michele and Norman Farwell
First Presbyterian Church Cooperstown
James Forbes, PE
Keith and Teresa Fulmer
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Theresa and Timothy Gibson
Glimmerglass Move Managers
William and Cynthia Goertemoeller
Mercedes and Steve Gotwald
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Lori Grace
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Linwood Fund of the New York
Community Trust
Literacy Volunteers of Otsego and
Delaware Counties
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Laura and Joseph Malloy
Frank and Elizabeth Maloney
Nick and Emily Marcalus
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Circe McKenney
David and Margery Merzig
Karen and Paul Mihan
Carol A. Miller
Kimberly Miller
Maureen Fitzgerald Murray
Roxanne and Kevin Murray
Sarah Nader-Marcus
Francis and Stephanie Nolan
Katherine ODonnell
Otsego Area Rowing

Judith Pachter
Angelica Gosiewska Palmer
Karen Palmer
Debra and Mark Parisian
Paul and Sarah Patterson
Magdalena Pellerito
Emilie Peterson
Michael and Janine M. Peterson
Carol and Stephen Phelps
Emily Price
Andrew Purtiz and Nancy Bondurant-Couch
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Judith Talbot
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Christie Brown Tillapaugh
Joanne Tobey and Steven Zerby
Lucy Townsend
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Jessica Williams
Linda Wilcox
Alvin and Patricia Winne
Jeffrey Woepfel and Janine Sabella
Edward S. Wolff
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Steve Zerby Design/Build



Tribute Gifts

In Honor of

In honor of Harry & Ellen Levine
and Liz Harvey

Laurel and George Harvey

In honor of the wonderful literacy volunteers

Jeanne Ellsworth

In honor of Mildred Parish

Cynthia Walton-Leavitt

In honor of Debra Marcus

Hollie Jaffe and John Relethford

Sarah Nader-Marcus, Cody Silverman

In honor of Laura and Joe Malloy

Adele Luning Whitener

In Memory of

In memory of Ted Robinson

Betty Robinson

In memory of George Marcus and
Peggy Schiffman Marcus

Debra Marcus

In memory of Waldo CM Johnston

Waldo and Caroline Johnston

In memory of Sally Trosset

Lori Grace



Nonprofit Partner Fund Investments

Cooperstown Food Pantry
Otsego Rural Housing Assistance

THE POWER OF PHILANTHROPY

Making a difference matters and feels particularly meaningful when you focus on local needs. In 2025, our donor community made important philanthropic investments in Otsego County. A general gift to the Community Foundation of Otsego County provides funding for our two annual grant rounds. In addition to these gifts, donor-created funds extend our reach and support our nonprofit community. In 2025, we welcomed a number of new funds.

Martha and Paul Clarvoe Recycling Initiatives Fund

In early 2025, Hartwick residents Martha and Paul Clarvoe joined with the Community Foundation of Otsego County to establish a new fund to support recycling efforts throughout Otsego County. The Martha and Paul Clarvoe Recycling Initiatives Fund was created at CFCO to serve as a long-term resource for local organizations.

Paul and Martha, who have lived in Hartwick since 1980, are long-time advocates for environmental issues, including the importance of recycling. One of their largest recycling efforts was the restoration of a building in Hartwick, reusing many of the materials in the building and using construction methods to ensure energy conservation. They now operate the Freight Wheel Café and My Neighbor's Closet, which provides free clothing, in the restored structure.

Martha served on the board of the Otsego County Conservation Association (OCCA) for 15 years and was recognized with a Lifetime Achievement award in 2015 for her commitment. "Recycling is important to us," said Martha. "We have grandchildren, and we want to do all we can to ensure they inherit a healthy planet. The fund we established at the Community Foundation is designed to support local efforts to make our world a better place."

The Edward W. Stack Family Fund



Philanthropy is a family tradition for the Stacks. Their connection to Otsego County dates back to the 1960s, when Edward William Stack began traveling from Manhattan to Cooperstown for his work with The Clark Estates. Ed met Christina (pictured above), whom he married in 1967, at the Otesaga and they set up house on Long Island. Every summer, however, was spent in Cooperstown, where their three daughters, Amy, Kimberly, and Suzanne, were introduced to the natural beauty, clean air and water, cultural offerings, and caring community. Amy and her family decided to make Cooperstown their permanent home in the early 2000s when her daughter was born. Suzanne moved to the area shortly after. Christina continued to spend summers in Cooperstown after Ed's retirement and now lives at the Clara Welch Thanksgiving Home in Cooperstown.

Ed spent his career at The Clark Estates, where the Clark family's mission of supporting social, educational, and charitable institutions was a perfect fit for Ed, who shared with Christina a strong commitment to community service. Both practiced kindness and compassion for others in their daily lives and were active members of their church. Ed's career

with the Clark family provided him with an invaluable path to practice philanthropy as a livelihood.

When Ed passed in 2023 at age 88, Christina and the family began to consider how best to honor him and the impact he had on so many people and organizations. They decided opening a donor-advised fund at the Community Foundation of Otsego County was the perfect way to continue Ed's dedication to community-focused giving. The family was familiar with how impactful a donor-advised fund could be, Ed and Christina having established one in the 1990s in New York City. The Edward W. Stack Family Fund will support the causes long-championed by the Stacks, including clean air and water, food scarcity, mental health, equity and inclusion, education, and the arts. By establishing this fund, the Stack family has established a philanthropic legacy in the community they love.



A lasting legacy: The Mildred Parish Foundation Donor-Advised Fund



Mildred ("Milly") Parish was a lifelong resident of Oneonta. She received her degree from what is now SUNY Oneonta in 1951 and taught locally until 1984. Generous in her lifetime, when Milly died she left a significant estate, a portion of which was designated to support local nonprofit causes. To achieve Milly's stated philanthropic goals, her family established the Mildred Parish Foundation Donor-

Advised Fund at CFOC. Creating a donor-advised fund saved the family the expense and challenges of establishing a private foundation to fulfill Milly's philanthropic intention. Today her heirs, working closely with CFOC, invest Milly's generous fund into local projects. The Fund has contributed to both the CFOC Spring and Fall grant cycles, augmenting the impact of donor generosity.



Nonprofit Partner Funds

One of the ways CFOC supports our nonprofit partners is by offering investment management services to help them grow their assets. In 2025, CFOC welcomed Otsego Rural Housing Assistance (ORHA) to our family of nonprofit partner funds.



Established in 1984, ORHA is the only housing-preservation company in Otsego County. They provide and preserve quality affordable housing to qualifying residents. Programs at ORHA address the practical realities of maintaining decent, affordable housing in our rural, low-wage area and connect residents with support, resources, and funding to enhance their quality of life.

THE POWER OF PHILANTHROPY

Addressing food insecurity has been a focus for CFOC from the start. Changes to federal funding related to food programs in early 2025 put extra stress on a system already stretched thin. With support from our donor family, the Mildred Parish Foundation Donor-Advised Fund at CFOC, the Robert and Esther Black Family Foundation, and the Robert and Esther Black Family Foundation Fund at the Richland County Foundation, we were able to provide funding to help meet emerging needs and feed our neighbors.

Much of the good work of addressing food insecurity is done by local food pantries across Otsego County. Here we highlight just a few that received support during our 2025 Fall Grants Cycle.

Saturday's Bread



Based at the First United Methodist Church in Oneonta, Saturday's Bread, in existence since 1992, serves 175 to 200 individuals each week, offering in-house meals, take-out, and delivery to those unable to travel. A dedicated corps of volunteers and two staff members get the job done.

In 2025, Saturday's Bread received funding from CFOC to improve refrigerators and freezers

in the kitchen and storerooms, thereby improving reliability and the capacity to feed those in need.

Saturday's Bread was affected by USDA shortfalls in 2025, receiving less grant funding while seeing an increase in the number of people in need of a meal. Support from CFOC has helped address shortfalls as well as provided funding for necessary upgrades.

Butternut Valley Food Pantry

Serving members of the Gilbertsville-Mount Upton and Morris school districts, the Butternut Valley Food Pantry received support from CFOC to replace an aging freezer and expand their offering of diet-specific products not available to them from the regional food bank. The food pantry had surveyed its clients regarding health issues to help align food offerings with needs. As a result, the Butternut Valley Food Pantry is now offering low-sodium and sugar-free items.

Richfield Springs Community Center



The Richfield Springs Community Center was launched in 1999 to serve the Town of Richfield and

surrounding areas. Its programs are designed to fulfill their mission “to empower individuals with educational, emotional and social life skills... enabling families to become stronger, creating a thriving community.”

The Richfield Springs Community Center serves four or five hundred people throughout the year. Food is one of the most costly expenses for their programs, such as the senior program that provides a hearty meal as well as camaraderie at lunch each Wednesday. Tuesdays and Thursdays from 4 to 6 p.m., the T-Zone program for youth aged 12 to 15 also provides a meal for students staying after classes, often to attend sports practice. On Friday evenings, The Zone program for grades 7 to 12 gives young people a place to gather while providing a healthy meal and snacks.

Funding from CFOC supports this work to bring neighbors together and make sure no one goes hungry.

As one organizer said, “The Community Foundation support is PRICELESS! Words cannot even begin to express how grateful we are! Without the support of grantors like the Community Foundation of Otsego County, we would not be able to continue our mission.”



Cooperstown Food Pantry



The Cooperstown Food Pantry was established in 1977 by Ellen St. John. Serving the entirety of Otsego

County, the Cooperstown Food Pantry today fulfills its mission with two full-time staff and more than 80 volunteers. This committed group served more than 2,600 households (about 8,400 people) in 2025.

Over the past year, the Cooperstown Food Pantry (CFP) has stepped up to meet increasing demand. Cuts at the federal level, to both the USDA and the LFPA (Local Food Procurement Act), disrupted the supply of food to CFP, while events such as the government shutdown increased requests for services. Over the last year, the average cost of a canned good grew from 10 cents apiece to 65-75 cents as CFP continued to serve more neighbors in need.

Funding from CFOC in 2025 was directed to support Otsego County’s unhoused population. Necessities, such as hygiene kits, pop-tab canned goods, and other products that are easily transportable and accessible are needed. The Cooperstown Food Pantry provides these items to the Otsego County Department of Social Services’s Phoenix Orchards “Tiny House Project,” just outside of Cooperstown, and to unhoused people who are served by the Community Cupboard’s Mobile Food Pantry.

“Local, community-based funding has never mattered more, and we are deeply grateful for every resource that helps us continue showing up for our neighbors,” said CFP Executive Director Will Kleffner. “At the Cooperstown Food Pantry, our mission is to address poverty and hunger in Otsego County, work that is only possible through the generosity of partners like the Community Foundation of Otsego County. Their support goes far beyond financial; personally, I believe what sets CFOC apart is their collaborative, community-minded approach to grantmaking. CFOC does not simply fund the work; they invest in the broader ecosystem of community support.”

ENTERPRISE FUND HELPS SMALL BUSINESSES GROW

One of the priorities of the Community Foundation of Otsego County is to make investments that support grassroots economic development. The Enterprise Fund was established in 2025 to provide low-interest loans to local small businesses.

Evermore Accounting LLC, located in Oneonta, became the first recipient of a \$35,000 loan to help build the business. Within six months, business owner Brittany Critti was ready to pay back the loan, well in advance of the three-year schedule.

We asked Brittany about building a business in Otsego County and how she decided the Community Foundation of Otsego County was the right partner to help her business grow.



Evermore Accounting Founder Brittany Critti

Initial funding for the Enterprise Fund loan program was provided by CFOC, through the generosity of its donors, and Otsego County Economic Development Corporation. A grant from NYCON funded the software required to manage the Enterprise Fund.

The purpose of the Enterprise Fund is to make program-related investments to companies that do business in Otsego County, or employ Otsego County residents, to improve the economic health of Otsego County and the surrounding area.

Business owners interested in learning more should contact Jeff Katz, CFOC's executive director, at contact@cfotsego.org.

Q: What do you enjoy the most about this community?

What I enjoy most is the level of community involvement. Otsego County has close-knit residents, business owners, and patrons who genuinely care about where they live and work. There is a strong sense of collaboration, and it allows me to feel like I am part of something bigger than myself or my business.

Q: Please talk about your business. How did you come to start it, what motivates you, and what is your vision for your business's future?

I've worked in many areas of the accounting industry, including nonprofits, higher education, municipalities, and small businesses. Across all of those roles, I kept seeing the same opportunities—stronger systems, clearer processes, and more education for the people involved.

One of my biggest passions is education. Many people are intimidated by payroll, bookkeeping, and taxes because they're afraid of making a mistake. That fear is valid, but I've found that when people understand their numbers, they feel more confident and more invested in what they're building.

I started Evermore Accounting in 2021 with the goal of building something lasting—a legacy I could be proud of. My business is rooted in empathy, compassion, and a commitment to being truly excellent at what I do. I've been fortunate to learn

under incredible mentors, and now I get to share that knowledge with my clients. When someone works with me, I want them to feel supported and cared for—not like just another number.



Q: How did you hear about the Enterprise Fund and/or the Community Foundation of Otsego County? Why were you interested in receiving an Enterprise loan?

I learned about the Community Foundation of Otsego County and the Enterprise Fund through Michelle Catan with the Small Business Chapter. I periodically teach alongside Michelle when she is welcoming new business owners, so I was already familiar with the organization’s mission and its commitment to supporting local entrepreneurs. When looking at funding sources for growing businesses, the process can feel overwhelming. From the beginning, Jeff Katz and Harry Levine made the experience approachable, supportive, and straightforward. What stood out to me was that the Enterprise Fund felt like a partnership rather than a transaction. I was interested in the Enterprise loan because it aligned with my goals for sustainable, intentional growth. I wanted to invest in my business in a way that reduced stress, supported long-term stability, and allowed me to continue serving my clients and the community with care.

Q: How has the loan changed or supported your business?

I have a constantly growing vision for my business, and prior to receiving the loan, worrying about cash flow that would support strategic growth was a significant source of stress. The Enterprise Fund loan helped alleviate that pressure and allowed me to focus on building my business intentionally rather than operating in survival mode.

The stability the loan provided gave me the ability to think strategically about growth, to strengthen internal systems, and to maintain the high level of personal service my clients expect. It allowed me to move forward confidently while staying true to the values that define my work.

Q: What would you say to other small businesses thinking about an Enterprise Fund loan?

I would encourage other small business owners to explore the opportunity and start the conversation. The Enterprise Fund is not just about access to capital—it is about working with people who genuinely want to see local businesses succeed.

It’s for businesses that are rooted in the community and focused on long-term sustainability, this kind of support can be truly transformative. It allows you to grow with intention, stay aligned with your values, and continue contributing to the local economy in a meaningful way.

CREATE YOUR LEGACY

HAVE A LASTING IMPACT WHEN YOU JOIN THE SCHLATHER SOCIETY AT CFOC

Having a lasting impact is important to many of the caring people who support the Community Foundation of Otsego County. They are generous in their lifetimes and want to ensure the causes they care about continue to receive their support. If you want to make sure that the organizations that matter to you benefit from your generosity in perpetuity, consider including CFOC in your estate plan.

You can create a legacy with CFOC in a number of ways:

- Name CFOC as a beneficiary of your IRA or other retirement plan.
- Name CFOC in your will. Already have a will? Add a codicil to your existing will to name CFOC as the recipient of a percentage of your estate, what is left in your estate after other obligations are met, or a specific asset or dollar amount.
- Ask your bank for a POD form and name CFOC as the recipient.
- Name CFOC as the beneficiary of your life insurance policy.

You can also work with us in your lifetime to establish a fund that will continue your good work when you're gone:

- **Create a donor-advised fund.** You decide which causes benefit from the fund; we make it easy for you to give. Your gift to CFOC to establish the fund may qualify for a tax deduction. Use stock that's increased in value to establish your fund and you'll skip capital-gains taxes, too.

- **Establish a field-of-interest fund.** What matters most to you? When you establish a field-of-interest fund with us, you tell us what's most important. We handle all requests for funding and make grants, enabling you to have an impact without actively participating. If you have an IRA, making a qualified charitable distribution from that IRA to the Community Foundation is a great way to create your fund. The money you transfer will not be taxed nor will it be included in your adjusted gross income.
- **Start a charitable gift annuity,** which will provide you with an immediate tax deduction as well as guaranteed income during your life.

Joining the Schlather Society can have tax benefits for you and for your heirs. It's a smart way to give—and a way to ensure your lasting impact.

Our legal name is the Community Foundation of Otsego County and our federal tax ID is 84-2243769.



CREATING A FUND WITH CFOC

Establish a fund with CFOC in your lifetime and you will be recognized as a member of the Schlather Society. You may also receive tax benefits.

For example, using the required minimum distribution (if you are 73 or older) from your IRA to set up a field-of-interest fund can reduce your adjusted gross income and therefore the taxes you pay.

If you use appreciated securities to establish a donor-advised fund, you may receive a tax deduction for the market value of the transferred stock and you will not pay capital gains tax.

If philanthropy is a part of your life, then creating a fund may be right for you.

We ask that donors contribute at least \$10,000 to create a fund. The money in the fund is managed with our other assets to produce income, which means your initial gift grows and can do more good in our community. Other members of the community can also make gifts to your fund, furthering its impact.

If you create a **donor-advised fund**, you can name a successor advisor to carry on your philanthropy, or you can rely on us to continue to give to causes that you valued in your lifetime.

With a **field-of-interest fund**, you can be assured that your gift will continue to be used for the purpose defined when you established the fund. During your lifetime, you can continue to make gifts to the fund, but we'll manage the process of identifying worthy projects that align with your interests and manage the grants to these nonprofit organizations.

Tax law has changed in 2026. If you itemize on your tax return, establishing a fund may be the best way to manage the taxes you pay.

Please talk to your tax and/or financial adviser to understand what works best for you.

To learn more about creating a fund tailored to your philanthropic interests, contact Jeff Katz, executive director, at contact@cfotsego.org or Joanne Tobey, director of development, at joanne@cfotsego.org.

The Community Foundation of Otsego County gratefully acknowledges the following members of the Schlather Legacy Society:

Anonymous (2)
Robert and Marcy Birch
Carol and Edward Forman
Dennis Fowler
Harry and Ellen Levine
Mildred Parish*
Robert* and Karen Schlather
Thomas Simpson
The Stack Family
Michael Stein and Doris Motta
Joanne Tobey
E. C. Winsor*
Edie* and Pat Yinkey
Marianne Younkheere

The Schlather Legacy Society is named for CFOC founder Bob Schlather, who in his lifetime was committed to public service. His love for his community continues today through the impact of the Robert & Karen Schlather Fund, a donor-advised fund the Schlathers established at CFOC to support the arts and other organizations in Otsego County.

* deceased

2025 FINANCIAL REPORT (UNAUDITED)

FINANCIAL POSITION AS OF DECEMBER 31, 2025

ASSETS

Unrestricted Cash	\$ 359,095
Total Current Assets	\$ 359,095
Pledges Receivable	\$ 359,602
Loan receivable	\$ 33,410
Investments	\$ 10,016,901
Total Non-Current Assets	\$ 10,409,913
Organizational costs and Website	\$ 12,370
TOTAL ASSETS	\$ 10,781,378

LIABILITIES AND NET ASSETS

Accounts Payable	\$ 2,213
Agency Funds Payable	\$ 443,014
Total Liabilities	\$ 445,227
Total Net Assets	\$ 10,336,151
TOTAL LIABILITIES AND NET ASSETS	\$ 10,781,378

STATEMENT OF ACTIVITY FOR FISCAL YEAR 2025

Contributions	
Restricted	\$ 2,740,580
Unrestricted	\$ 254,125
Total Contributions	\$ 2,994,705
Grants	\$ 71,250
Administrative Fees	\$ 82,197
Gain (Loss) on Investments	\$ 761,205
Program Income	\$ 15,000
Other Income (Interest)	\$ 594
TOTAL REVENUES, GAINS AND OTHER SUPPORT	\$ 3,924,951
Functional Expenses	
Program	\$ 66,345
Grants	\$ 928,288
Management and General	\$ 236,987
Fundraising	\$ 83,100
Total Functional Expenses	\$ 1,314,729
Increase (Decrease) in Net Assets	\$ 2,610,231
Net Assets at Beginning of 2025	\$ 7,725,920
Net Assets at End of 2025	\$ 10,336,151

Our full audited report and our tax return will be available on line at cfotsego.org when completed

CFOC BY THE NUMBERS



The above numbers are since the inception of CFOC.



COMMUNITY
FOUNDATION
OF OTSEGO
COUNTY

EMAIL

CONTACT@CFOTSEGO.ORG

WEBSITE

CFOTSEGO.ORG

FACEBOOK

FACEBOOK.COM/CFOTSEGO

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OTSEGO-COUNTY](https://LINKEDIN.COM/COMPANY/COMMUNITY-FOUNDATION-OF-OTSEGO-COUNTY)

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SPRINGFIELD CENTER, NY 13468

**FOR MORE INFORMATION,
FOR NEWS, TO DONATE,
AND TO APPLY FOR
AWARDS PLEASE VISIT:
CFOTSEGO.ORG**



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COUNTY