Why Planned Giving?

Have you considered a bequest or memorial gift to Catholic Charities?

Supporters of Catholic Charities who believe in the agency’s mission and efforts to help those in need can leave a lasting legacy by including a bequest to Catholic Charities in their will.

Gifts to agencies of Catholic Charities of the Diocese of Rochester provide social benefits from the Rochester area, throughout the Finger Lakes, and into the Southern Tier. Each year, the work of these agencies touches the lives of 250,000 neighbors in need. We provide food, clothing, shelter, and a wide range of additional life-enhancing services to people of all faiths whose lives have been interrupted by poverty or illness.

As an approved charity under IRS section 501(c)(3), Catholic Charities of the Diocese of Rochester is an eligible recipient of charitable gifts and trusts. A planned gift to any organization of the Catholic Charities of the Diocese of Rochester will go a long way toward helping individuals and families in need, and, in turn, will help strengthen our communities.

What is a bequest?

A charitable bequest is a gift option that can be used by almost everyone and allows donors an opportunity to enjoy their legacies today at no immediate cost. Bequests are easy to arrange in consultation with an attorney preparing your will.

The wording of a bequest in your will can be as simple as the following:

I hereby bequeath the sum of _______/or _____% of my estate to Catholic Charities (you can designate to Diocesan Catholic Charities, 1150 Buffalo Road, Rochester, NY 14624, or any of its agencies).

FOR MORE INFORMATION ON PLANNED GIVING

Please check our web site at www.dor.org/index.cfm/catholic-charities

or call us at 585-328-3210

e-mail CatholicCharitiesInfo@dor.org

100th Anniversary of the date on which New York State Governor Charles Whitman signed into law a special act of the State Legislature establishing Catholic Charities Corporations in each of the Dioceses in New York State.

For this one hundred years, and for longer in some Dioceses, Catholic Charities agencies have been the primary vehicle through which the Church has responded to the Gospel call to love our neighbors. This Annual Report provides a matrix of services outlining how in 2016 Catholic Charities touched the lives of more than 250,000 individuals, descriptions of individual activities undertaken by the members of our Diocesan agency and a financial report for the Corporation as a whole.

The past year was a time of great challenges and opportunities for Catholic Charities. Supported by a report issued by the Community Foundation on the devastating extent of poverty in Monroe County, Catholic Charities has focused even more intensely on anti-poverty efforts. Building on our 100 year legacy of giving priority to serve the poorest and most vulnerable among us, Catholic Charities has continued existing efforts, such as Bridges Out of Poverty and initiated new programs, such as the Adult Mentoring Program created through the Rochester/Monroe Anti-Poverty Initiative, to help more families move to self-sufficiency.

Over the last year Catholic Charities has devoted considerable energy and resources to respond to changing State funding patterns created by the State’s Medicaid Reform Initiatives. Significant changes have been made in service delivery, data collection and billing procedures in existing programs. Several of our component agencies have newly initiated Medicaid-funding services through the Home and Community Based Medicaid Waiver program. Our Diocesan agency has joined with our counterparts in Buffalo, Syracuse and Albany to create a Children’s Health Home program serving 48 counties in upstate New York. At the same time as maintaining existing services, and creating these new program initiatives, Catholic Charities has also had to devote considerable time and resources to respond to ever increasing Federal and State regulations governing our service delivery. During 2016, major emphasis was devoted to planning for creation of a Diocesan Catholic Charities Corporate Compliance Office as now required by Federal regulations.

As always, we express sincere appreciation to the Most Reverend Salvatore R. Matano, Bishop of Rochester, for his leadership and staunch support of our work.

While the Catholic Charities Corporation continues to grow, our focus remains on each and every individual we serve, in whom we see the face of Jesus. As we walk together with those we serve, we seek to provide “Help that Works, Hope that Lasts!”

Jack Balinsky, Diocesan Director

2016 Financial Report

SUPPORT AND REVENUE:

<table>
<thead>
<tr>
<th>Description</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and contracts</td>
<td>12,289,408</td>
<td>-</td>
<td>-</td>
<td>12,289,408</td>
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<tr>
<td>Program service fees</td>
<td>20,485,804</td>
<td>-</td>
<td>-</td>
<td>20,485,804</td>
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<tr>
<td>Food in-kind assistance</td>
<td>7,765,266</td>
<td>-</td>
<td>-</td>
<td>7,765,266</td>
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<td>Contributions</td>
<td>6,902,843</td>
<td>2,886,86</td>
<td>2,330</td>
<td>9,992,004</td>
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<tr>
<td>Investment income for operations</td>
<td>(82,954)</td>
<td>-</td>
<td>-</td>
<td>(82,954)</td>
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<tr>
<td>Prior year adjustment</td>
<td>810,171</td>
<td>-</td>
<td>-</td>
<td>810,171</td>
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<tr>
<td>Other</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Net assets released from restrictions</td>
<td>3,666,352</td>
<td>(3,666,352)</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Total support and revenue</td>
<td>71,436,890</td>
<td>(3,666,352)</td>
<td>2,330</td>
<td>70,866,994</td>
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EXPENSES:

<table>
<thead>
<tr>
<th>Description</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
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<tbody>
<tr>
<td>Program services</td>
<td>61,068,184</td>
<td>-</td>
<td>-</td>
<td>61,068,184</td>
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<tr>
<td>Support services</td>
<td>6,487,247</td>
<td>-</td>
<td>-</td>
<td>6,487,247</td>
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<tr>
<td>Fundraising</td>
<td>1,793,435</td>
<td>-</td>
<td>-</td>
<td>1,793,435</td>
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<tr>
<td>Total expenses</td>
<td>69,348,866</td>
<td>-</td>
<td>-</td>
<td>69,348,866</td>
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<tr>
<td>Excess (Deficiency)</td>
<td>2,088,024</td>
<td>(3,666,352)</td>
<td>2,330</td>
<td>1,518,128</td>
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</table>

OTHER ITEMS:

<table>
<thead>
<tr>
<th>Description</th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
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<tr>
<td>Investment income (loss), net</td>
<td>361,373</td>
<td>92,811</td>
<td>328,262</td>
<td>782,990</td>
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<tr>
<td>Investment income appropriated for operations</td>
<td>-</td>
<td>(42,049)</td>
<td>(165,216)</td>
<td>(207,265)</td>
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<td>Effect of change in insurance liability</td>
<td>4,052</td>
<td>-</td>
<td>-</td>
<td>4,052</td>
</tr>
<tr>
<td>Loss on disposal of property and equipment</td>
<td>(7,082)</td>
<td>-</td>
<td>-</td>
<td>(7,082)</td>
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<tr>
<td>CHANGE IN NET ASSETS</td>
<td>2,466,367</td>
<td>(521,464)</td>
<td>165,839</td>
<td>2,092,742</td>
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<tr>
<td>NET ASSETS - beginning of year</td>
<td>8,489,272</td>
<td>3,129,497</td>
<td>3,846,893</td>
<td>15,465,662</td>
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<tr>
<td>NET ASSETS - end of year</td>
<td>10,935,639</td>
<td>2,608,033</td>
<td>4,012,732</td>
<td>17,556,404</td>
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</tbody>
</table>
It doesn't happen often that you get to hear first-hand how a program has benefited a client. Staff from Catholic Charities of Chemung/Schuyler Counties recently shared one such story about a client named Mary. Mary had experienced a lot of challenges in her life, including losing her home and kids, being on food stamps, and having trouble finding employment. She was referred to Catholic Charities by her mental health worker at Steuben County Parishes and was eager to enroll in a program that could help her get back on her feet.

Through the Self-Directed Services program at Catholic Charities, Mary was able to set aside money from her food stamps to pay for rent and utilities, which allowed her to move into stable housing. She was also able to attend school and receive the support she needed to improve her skills and find employment. As a result, Mary was able to secure a job and move into permanent housing, leading to a positive change in her life.

The story of Mary highlights the importance of programs like Self-Directed Services, which empower individuals to take control of their own lives and work towards a better future. Catholic Charities of Chemung/Schuyler Counties is committed to providing such programs and services to help clients like Mary achieve their goals and improve their quality of life.
Catholic Charities of Tompkins/Tioga Counties

Opened in the spring of 2016, Catholic Charities of Tompkins/Tioga Counties is a transitional housing program for single homeless women. The program is located in a four bedroom rental home located in downtown Ithaca. This program strives to go beyond simply providing short-term shelter to its residents. Our goal is to support the women in reaching greater self-sufficiency. The women in the house work towards their own personal goals, including gaining and maintaining employment, rebuilding relationships with their family and gaining greater self-confidence. A Place to Stay also places a strong emphasis on teaching our guests about rental stewardship and offers education on tenants’ rights and responsibilities. The on-going goal of the program is for the residents to transition out of this program and into their own independent housing.

During 2016, 10 single homeless women found safe, secure lodging at A Place to Stay. Also in 2016 through Catholic Charities, 135 people received assistance with rent or security deposit so they could have a roof over their heads. These served included:

• A homeless single parent with a teenager in Ithaca County. The teen was coming home from school hungry and cold, so they were unable to do their homework. A Place to Stay provided immediate assistance with a security deposit and utility assistance so they could have a roof over their heads.

Catholic Charities of Wayne County

Reflecting its accomplishments over the years and in 2016, the Food Bank of the Southern Tier was named the 2017 Food Bank of the Year by Feeding America, the nation’s largest hunger-relief organization. The Food Bank was selected for being the most outstanding food bank out of more than 300 Feeding America member food banks across the country. The Food Bank was selected because it was “an organization that is passionate about being involved in the community and making a difference.”

In addition to the early intervention, Catholic Charities provides counseling and mindfulness support to students in Grades K-5. Students are seen for individual counseling on a weekly basis and the same staff members also work with parents, providing support and acting as a liaison between school, home, and classroom. (It should be noted that during the 2016-17 school year some students could only be seen every other week due to the increasing numbers of students who are in need of such services.) In addition to the individual sessions, Catholic Charities supports the Palmyra-Macedon Mental Health team in providing group lessons to students who struggle with social skills, school orientation, and various mental health concerns.

Catholic Charities staff members also continue to support students by providing mindfulness strategies to increase both academic and emotional success.

During the 2016-17 school year, 87 students received services for issues such as early childhood trauma, behavior, and school adjustment, as well as comprehensive psychosocial assessments, diagnoses, service plans, and individual counseling. These services utilized data to support their therapies, to work with parents, and to consult with wellness providers.

“Because of the tremendous success of Catholic Charities’ services in the Palmyra-Macedon Central School District, the District has included $47,300 in its general food budget to expand a mindfulness program; such funds will allow the district to employ a certified mindfulness specialist representing in-kind services in partnership with Catholic Charities.

“Please know that I am in full support of continuing Childhood Counseling and the Bank’s Program services in the next school year as well as any opportunity to expand these services,” the letters brought by Catholic Charities’ programming in the early childhood setting have long-term effects for our school for our community, and for the future of Wayne County.

Contact Information
Executive Director: Deacon Peter Dohr
(80 East Union Street, Newry, NY 14513)
Phone: (315) 331-4867
Website: www.ccvwayne.org

Food Bank of the Southern Tier

For more than twenty years, Catholic Charities of Livingston County has offered a holistic and cost effective approach to health and wellness for all persons served. In 2016, services were provided to more than 8,000 individuals.

Through its holistic approach to behavioral health and community services, these clients of Catholic Charities offers a wide variety of services to these individuals:

• Employment education
• Counseling to individuals and families
• Poverty education
• Budget counseling
• Social Security navigation counseling
• Transportation coordination for medical appoint- ments
• Emergency housing
• Food assistance through the Food Pantry
• Backpack program for school children
• Emergency assistance, including financial assistance, rent assistance, utility assistance and clothing
• Mentoring for youth
• Transitional job counseling

These services have been provided by a committed staff of 11 and would not be possible without the assistance of 169 volunteers.

Services are provided in partnership with Livingston County Offices including Social Services, Men’s and Women’s Shelters, the Salvation Army, the Boys and Girls Club, and the County-based organizations.

Contact Information
Executive Director: Tabitha Brewer
34 East Clinton Street, Plattsburgh, NY 12901
Phone: (518) 568-6466
Website: www.aboltcs.org

Food Bank of the Southern Tier

Providing comprehensive case management and support to families is one of Catholic Charities of the Finger Lakes longest, continuing running services. Referrals are received from courts, community partners, area faith communities and, in some cases, clients reach out requesting the services. Preventive support funds have decreased significantly over the years, and this grant is essential to preserving these critical services.

The grant was leveraged through the help of the New York State Office of Mental Health, the Mental Hygiene League of New York, the Church, and other local partners. The funds have been used to hire a full-time support coordinator. This new staff member has been critical to the family, helping them with a variety of issues and being of the family.

The funding is essential for providing preventive supports to families in need,” said Bill Lamb, Director of Services. “Too often we are linked with families after a child has been removed from their care, or when the household is homeless following an eviction. This grant, coupled with funds from the United Ways of Ontario and Seneca Counties, allow our agency to work with families to prevent their circumstances from escalating to crisis level.”

The program model was changed to reflect the needs of families, bringing an early age.

In addition to receiving a grant to be the lead agency for the Adult Mentoring program, the first program of RMAA (the Rochester/Monroe Anti-Poverty Initiative), the major developments at Catho- lic Charities in 2016 were in the behavioral health area.

Through the continuing excellent leadership of Kristie Ellis, the Mental Health Clinic, had achieved a milestone in December, 2015, when it was issued a license renewal for a three year period, the longest possible time.

Catholic Charities staff members also continue to work with vulnerable families in the Finger Lakes. In addition to receiving a grant to be the lead agency for the Adult Mentoring program, the first program of RMAA (the Rochester/Monroe Anti-Poverty Initiative), the major developments at Catholic Charities in 2016 were in the behavioral health area.

Excerpts from this letter, from Palmyra-Macedon Superintendent Robert Ike sent in support of a grant application by Catholic Charities of Wayne County gives testament to the work of the agency in 2016.

“Dear Members of the Bulls Fund.

I am writing this letter in support of grant application by Catholic Charities of Wayne County that gives testament to the work of the agency in 2016.

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Whether physical or emotional, the number of students who struggle with social skills, school orientation, and various mental health concerns.

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Catholic Charities of the Diocese of Rochester, Inc.

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MONROE COUNTY
Catholic Family Center (FC)
Main Office — Program Sites
Catholic Charities Community Services (CM)
Main Office — Program Sites
Providence Housing — Main Office (PH)
Main Office

AREA WIDE
Catholic Family Center (FC)
Main Office — Program Sites
Catholic Charities Community Services (CM)
Main Office — Program Sites
Catholic Charities of Livingston County (LV)
Main Office — Program Site
Catholic Charities of the Finger Lakes (FL)
Main Office — Program Site
Catholic Charities of Steuben County (ST)
Main Office — Program Site
Catholic Charities of Tompkins/Tioga Counties (TT)
Main Office — Program Site
Catholic Charities of Chemung/Schuyler Counties (CS)
Main Office — Program Site
Food Bank of the Southern Tier (FB)
Main Office
Catholic Charities of Wayne County (W)
Main Office — Program Site
Camp Stella Maris (SM)

Catholic Charities of the Diocese of Rochester, Inc.

<table>
<thead>
<tr>
<th>Agency</th>
<th>Emergency Services</th>
<th>Support Service</th>
<th>Special Needs</th>
<th>Housing Services</th>
<th>Food Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic Family Center</td>
<td>4,227 served</td>
<td></td>
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<tr>
<td>Catholic Charities Community Services</td>
<td>Over 35,000 persons in our Twelve County Diocese Received Emergency Assistance in 2016</td>
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<tr>
<td>Catholic Charities of Chemung/Schuyler Counties</td>
<td>3,564 served</td>
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<tr>
<td>Catholic Charities of Livingston County</td>
<td>2,691 served</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Catholic Charities of Steuben County</td>
<td>1,800 served</td>
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<tr>
<td>Catholic Charities of the Finger Lakes (FL)</td>
<td>Emergency Assistance - 2,200 households served</td>
<td>Support Services - 6,200 served</td>
<td></td>
<td>Emergency Housing - 7,000 served</td>
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<tr>
<td>Catholic Charities of Tompkins/Tioga Counties</td>
<td>1,800 served</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Catholic Charities of Wayne County</td>
<td>4,700 served</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Food Bank of the Southern Tier

- Food Assistance - 4,700 served

Catholic Charities helped 500 families with heating assistance in 2016

Food Bank of the Southern Tier

- Emergency Assistance - 2,783 served
- ABLE Participants - 1,580 served
- Off Season - 54 groups - 3,277 served
- Senior Camp Participants - 2,724 served

Camp Stella Maris

- 1,690 individuals served
- 796 units in 22 projects

Providence Housing Development

- 1,543,394 pounds of food distributed from 101 Member Agencies - 1,369 people served each week - 67% children and 19% seniors - 5,318 volunteer hours of food distribution.
- 6,200 families served each week - 3,2 million pounds of food distributed.
- 3,2 million pounds of food distributed.
- 785,000 meals served by Catholic Charities.
- 11,500 families served each week - 24,000 meals served.
- 468 children served.

Catholic Charities in the Diocese of Rochester touched the lives of nearly 250,000 individuals in our twelve county diocese in 2016.
We help our neighbors develop skills for life. We empower them to lead healthy, productive independent lives. We provide a place where people can grow in personal dignity.

### Catholic Charities of the Diocese of Rochester, Inc.

<table>
<thead>
<tr>
<th>Agency</th>
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<th>Support Services</th>
<th>Special Needs</th>
<th>Housing Services</th>
<th>Food Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic Family Center</td>
<td>- 4,237 served</td>
<td>- Bromnurse - 1,210 served</td>
<td>- Mental Health Crisis - 218 served</td>
<td>- Shelters &amp; Supportive Housing - 2,287 served</td>
<td>- Food Assistance - 4,700 served</td>
</tr>
<tr>
<td>Catholic Charities Community Services</td>
<td>Over 35,000 persons in our Twelve County Diocese Received Emergency Assistance in 2016</td>
<td>- Developmental Disabilities - 181 served</td>
<td>- Mortgage Foreclosure Prevention - 125 served</td>
<td>- Catholic Charities helped 500 families with housing assistance in 2015</td>
<td>- Food Parity - 4,039 served</td>
</tr>
<tr>
<td>Catholic Charities of Livingston County</td>
<td>- 2,691 served</td>
<td>- Community Care - 133 served</td>
<td>- Emergency Housing Assistance - 61 served</td>
<td>Through 163 Member Agencies, the Food Bank helps 150,000 different individuals each year</td>
<td></td>
</tr>
<tr>
<td>Catholic Charities of Steuben County</td>
<td>- Turning Point - 1,020 served</td>
<td>- Substance Abuse Prevention - 6,200 served</td>
<td>- Kinship Care - 77 served</td>
<td>Catholic Charities in the Diocese of Rochester touched the lives of nearly 350,000 individuals in our twelve county diocese in 2016</td>
<td></td>
</tr>
<tr>
<td>Catholic Charities of the Finger Lakes</td>
<td>- 1,880 served</td>
<td>- Emergency Assistance - 2,200 households served</td>
<td>- Emergency Housing - 179 served</td>
<td>- Food Assistance - 4,700 served</td>
<td></td>
</tr>
<tr>
<td>Catholic Charities of Tompkins/Tioga Counties</td>
<td>- Templeton - 1,180 served</td>
<td>- Immigration Services - 817 served</td>
<td>- School Lunch Program - 2,700 meals served</td>
<td></td>
<td></td>
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<tr>
<td>Catholic Charities of Wayne County</td>
<td>- 1,880 served</td>
<td>- Nutrition Outreach - 221 served</td>
<td>- Supportive Housing Services - 251 served</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Bank of the Southern Tier</td>
<td>- 1,500 served</td>
<td>- Nutrition Outreach - 221 served</td>
<td>- Supportive Housing Services - 251 served</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camp Stella Maris</td>
<td>- 1,500 served</td>
<td>- Parenting Education - 500 served</td>
<td>- Supportive Housing Services - 251 served</td>
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<td></td>
</tr>
<tr>
<td>Providence Housing Development</td>
<td>- 1,500 served</td>
<td>- Foster Care - 61 served</td>
<td>- Supportive Housing Services - 251 served</td>
<td></td>
<td></td>
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<tr>
<td>Catholic Charities of Chemung/Schuyler Counties</td>
<td>- 1,500 served</td>
<td>- Foster Care - 61 served</td>
<td>- Supportive Housing Services - 251 served</td>
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</tbody>
</table>

### MONROE COUNTY
Catholic Family Center (FC)
- Main Office
- Program Sites

Catholic Charities Community Services (CM)
- Main Office
- Program Sites

Providence Housing - Main Office (PH)
- Main Office

### AREAWIDE
Catholic Family Center (FC)
- Main Office
- Program Sites

Catholic Charities Community Services (CM)
- Main Office
- Program Sites

Catholic Charities of Livingston County (LV)
- Main Office
- Program Site

Catholic Charities of the Finger Lakes (FL)
- Main Office
- Program Site

Catholic Charities of the Steuben County (ST)
- Main Office
- Program Site

Catholic Charities of Tompkins/Tioga (TT)
- Main Office
- Program Site

Catholic Charities of Chemung/Schuyler (CS)
- Main Office
- Program Site

Food Bank of the Southern Tier (FB)
- Main Office

Catholic Charities of Wayne County (WY)
- Main Office
- Program Site

Camp Stella Maris (SM)
- Program Site

### Food Bank of the Southern Tier (Serving 4 Counties)
- Summer Camp - 2,748 served
- ABLE Participates - 1,100 served
- Off Season - 54 groups - 3,377 served

### Camp Stella Maris
- Summer Camp - 2,748 served
- ABLE Participates - 1,100 served
- Off Season - 54 groups - 3,377 served

### Providence Housing Development
- 1,600 individual served
- 796 units in 29 projects

### Catholic Charities helped 500 families with housing assistance in 2015

**Through 163 Member Agencies, the Food Bank helps 150,000 different individuals each year.**

**Catholic Charities in the Diocese of Rochester touched the lives of nearly 350,000 individuals in our twelve county diocese in 2016.**

**Food Bank of the Southern Tier** (Serving 4 Counties)
- Food assistance in 2016 was at all time high

**Camp Stella Maris**
- Summer Camp - 2,748 served
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- Off Season - 54 groups - 3,377 served

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- 796 units in 29 projects
Catholic Charities
of Wayne County

Incorporating the success of its Mobile Food Pantry program and for in- volving donors in its strategic planning process. The organization was also recognized for its research on increasing capacity at its 165 member agencies, which include food pantries and meal sites throughout the Southern Tier.

President and CEO Natasha Thompson has as- serted a terrific staff that we consider best-in-class,” said Diana Aitken, CEO of Feeding America. “Their programs as well as their efforts to increase the amounts of food and groceries they provide to their community are exemplary.”

The Food Bank of the Southern Tier joins the ranks of past winners including the Akron-Canton Regional Foodbank in Ohio, the Alameda County Food Bank in California, and the Houston Food Bank, the largest food bank in the U.S. To celebrate this important milestone, the Food Bank of the Southern Tier hosted a press conference in late June and will incorporate it into its community outreach and various events throughout the coming months.

Last year, the Food Bank distributed 9.8 million meals to people in need through member agencies, Mobile Food Pantries, and the Backpack Program. In addition to nonperishable food and grocery items, the Food Bank distributed 2.2 million pounds of fresh produce.

Reflecting its accomplishments over the years and during 2016, the Food Bank of the Southern Tier was named the 2017 Food Bank of the Year by Feeding America, the nation’s largest hunger-relief organization. The Food Bank was selected for being the most outstanding food bank out of more than 200 Feeding America member banks across the country. The award of $15,000 will be used to fund case management and other critical supports to families in need,” said Bill Lamb, Director of Services. “Too often we are linked with families after a child has been removed from their care, or when the household is homeless following an eviction. This grant, coupled with funds from the United Ways of Ontario and Seneca Counties, allows our agency to work with families to prevent their circumstances from reaching a crisis level.”

The program allows staff to work with families to develop goals and objectives unique to their needs, and put in place action steps to support their efforts to meet those goals.

In addition to receiving a grant to be the lead agency for the Adult Mentoring program, the first program to win KSF funding in Rochester, the agency was also recognized for its research and development efforts. “The funding is essential for providing preventive supports to families in need,” said Bill Lamb, Director of Services. “We often talk with families about the importance of their support to families by providing mindfulness strategies, to work with parents, and to consult with wellness professionals.”

“Because of the tremendous success of Catholic Charities of the Southern Tier, the award was uplifted to the $150,000 mark. It would have been demoted if the county’s contribution would not have been included,” stated Natasha Thompson, Executive Director of Catholic Charities of the Southern Tier. “This grant will help our agency to work with families to prevent their circumstances from reaching a crisis level.”

Food Bank of the Southern Tier

For more than twenty years, Catholic Charities of Livingston County has offered a holistic and cost-effective approach to health and wellness for all persons served.

In 2016, services were provided to more than 8,000 individuals. Through its holistic approach to behavioral health and community services, the agency’s Catholic Charities offers a wide variety of services to these individuals:

• Employment education
• Counseling to individuals and families
• Poverty education
• Budget counseling
• Social Security navigation counseling
• Transportation coordination for medical appointments
• Emergency housing
• Food assistance through the Food Pantry
• BadgerKARE program for school children
• Emergency assistance, including financial assistance, rent assistance, utility assistance and clothing
• Mentoring for youth
• Transitional job counseling

These services have been provided by a committed staff of 11 and would not be possible without the assistance of 169 volunteers.

Services are provided in partnership with Living- ston County Offices including Social Services, Men- tal Health, Public Health, Workforce Development, Corrections and the Sheriff’s Office, as well as the County-based organizations.

Catholic Charities of the Finger Lakes

At the end of 2016, Catholic Charities of the Finger Lakes was awarded support from the New York Life Charitable Giving Program to continue work with vulnerable families in the Finger Lakes. The award of $15,000 will be used to fund case management services, providing critical supports to families struggling with financial stability, parenting or other stressors that threaten the general well-being of the family.

“The funding is essential for providing preventive supports to families in need,” said Bill Lamb, Director of Services. “We often talk with families about the importance of their support to families by providing mindfulness strategies, to work with parents, and to consult with wellness professionals.”

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I moved in to my new home, neighbors came, introduction, literally minutes after receiving my keys. The home inspector who was absolutely wonderful and I...
Have you considered a bequest or memorial gift to Catholic Charities?

Supporters of Catholic Charities who believe in the agency’s mission and efforts to help those in need can leave a lasting legacy by including a bequest to Catholic Charities in their will.

Gifts to agencies of Catholic Charities of the Diocese of Rochester provide social benefits from the Rochester area, throughout the Finger Lakes, and into the Southern Tier. Each year, the work of these agencies touches the lives of 250,000 neighbors in need. We provide food, clothing, shelter, and a wide range of additional life-enhancing services to people of all faiths whose lives have been interrupted by poverty or illness.

As an approved charity under IRS section 501(c)(3), Catholic Charities of the Diocese of Rochester is an eligible recipient of charitable gifts and trusts.

A planned gift to any organization of the Catholic Charities of the Diocese of Rochester will go a long way toward helping individuals and families in need, and, in turn, will help strengthen our communities.

What is a bequest?
A charitable bequest is a gift option that can be used by almost everyone and allows donors an opportunity to enjoy their legacies today at no immediate cost. Bequests are easy to arrange in consultation with an attorney preparing your will.

The wording of a bequest in your will can be as simple as the following:
I hereby bequeath the sum of [____] or [_____]% of my estate to Catholic Charities (you can designate to Diocesan Catholic Charities, 1150 Buffalo Road, Rochester, NY 14624, or any of its agencies).

FOR MORE INFORMATION ON PLANNED GIVING
Please check our web site at www.dor.org/index.cfm/catholic-charities or call us at 585-328-3210 or e-mail CatholicCharitiesInfo@dor.org

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The Good News

A QUARTERLY PROGRESS REPORT FROM CATHOLIC CHARITIES OF THE DIOCESE OF ROCHESTER

2016 Annual Report

April 24, 2017 marked the 100th Anniversary of the date on which New York State Governor Charles Whitman signed into law a special act of the State Legislature establishing Catholic Charities Corporations in each of the Dioceses in New York State.

For this one hundred years, and for longer in some counties, Catholic Charities agencies have been the primary vehicle through which the Church has responded to the Gospel call to love our neighbors. This Annual Report provides one matrix of services outlining how in 2016 Catholic Charities touched the lives of more than 250,000 individuals, descriptions of individual activities undertaken by the members of our Diocesan agency and a financial report for the Corporation as a whole.

The past year was a time of great challenges and opportunities for Catholic Charities. Spurred by a report issued by the Community Foundation on the devastating extent of poverty in Monroe County, Catholic Charities has focused even more intensely on anti-poverty efforts. Building on our 100-year legacy of giving priority to serve the poorest and most vulnerable among us, Catholic Charities has continued existing efforts, such as Bridges Out of Poverty and initiated new programs, such as the Adult Mentoring Program created through the Rochester/Monroe Anti-Poverty Initiative, to help more families move to self-sufficiency.

Over the last year Catholic Charities has devoted considerable energy and resources to respond to changing State funding patterns created by the State’s Medicaid Reform Initiatives. Significant changes have been made in service delivery, data collection and billing procedures in existing programs. Several of our component agencies have recently initiated Medicaid-funding services through the Home and Community Based Medicaid Waiver program. Our Diocesan agency has joined with our counterparts in Buffalo, Syracuse and Albany to create a Children’s Health Home program serving 48 counties in upstate New York.

At the same time as maintaining existing services, and creating these new program initiatives, Catholic Charities has also had to devote considerable time and resources to respond to ever increasing Federal and State regulations governing our service delivery. During 2016, major emphasis was devoted to planning for creation of a Diocesan Catholic Charities Corporate Compliance Office as now required by Federal regulations.

As always, we express sincere appreciation to the Most Reverend Salvatore R. Matano, Bishop of Rochester, for his leadership and staunch support of our work.

While the Catholic Charities Corporation continues to grow, our focus remains on each and every individual we serve, in whom we see the face of Jesus. As we walk together with those we serve, we seek to provide “Help that Works, Hope that Lasts.”

Jack Balmy, Diocesan Director

SUPPORT AND REVENUE:

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and contracts</td>
<td>$12,289,408</td>
<td>-</td>
<td>-</td>
<td>$12,289,408</td>
</tr>
<tr>
<td>Program service fees</td>
<td>20,485,804</td>
<td>-</td>
<td>-</td>
<td>20,485,804</td>
</tr>
<tr>
<td>Food in-kind assistance</td>
<td>7,765,266</td>
<td>-</td>
<td>-</td>
<td>7,765,266</td>
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<tr>
<td>Contributions</td>
<td>6,902,843</td>
<td>2,886,253</td>
<td>2,330</td>
<td>7,392,034</td>
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<tr>
<td>Investment income for operations</td>
<td>82,946</td>
<td>207,265</td>
<td>207,265</td>
<td>82,946</td>
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<tr>
<td>Prior year adjustment</td>
<td>810,171</td>
<td>-</td>
<td>-</td>
<td>810,171</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>3,666,352</td>
<td>(3,666,352)</td>
<td>-</td>
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<tr>
<td>Net assets released from restrictions</td>
<td>71,456,890</td>
<td>(537,226)</td>
<td>2,330</td>
<td>70,866,994</td>
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EXPENSES:

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<th>Temporarily Restricted</th>
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<tr>
<td>Program services</td>
<td>61,068,184</td>
<td>-</td>
<td>-</td>
<td>61,068,184</td>
</tr>
<tr>
<td>Support services</td>
<td>6,487,247</td>
<td>-</td>
<td>-</td>
<td>6,487,247</td>
</tr>
<tr>
<td>Fundraising</td>
<td>1,793,435</td>
<td>-</td>
<td>-</td>
<td>1,793,435</td>
</tr>
<tr>
<td>Total expenses</td>
<td>69,348,866</td>
<td>-</td>
<td>-</td>
<td>69,348,866</td>
</tr>
<tr>
<td>Excess (Deficiency)</td>
<td>2,088,024</td>
<td>(537,226)</td>
<td>2,330</td>
<td>1,518,128</td>
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OTHER ITEMS:

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<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
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<tbody>
<tr>
<td>Investment income (loss), net</td>
<td>361,373</td>
<td>92,811</td>
<td>328,235</td>
<td>782,909</td>
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<tr>
<td>Investment income appropriated for operations</td>
<td>-</td>
<td>(42,049)</td>
<td>(165,216)</td>
<td>(207,265)</td>
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<tr>
<td>Effect of change in insurance liability</td>
<td>4,052</td>
<td>-</td>
<td>-</td>
<td>4,052</td>
</tr>
<tr>
<td>Loss on disposal of property and equipment</td>
<td>(7,082)</td>
<td>-</td>
<td>-</td>
<td>(7,082)</td>
</tr>
</tbody>
</table>

CHANGE IN NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>2,446,367</td>
<td>(521,464)</td>
<td>165,839</td>
<td>2,090,742</td>
</tr>
</tbody>
</table>

NET ASSETS - beginning of year | 8,489,272 | 3,129,497 | 3,846,893 | 15,465,662 |

NET ASSETS - end of year | $10,935,639 | $2,608,033 | $4,012,732 | $17,556,404 |