

A Year in Review





You have likely experienced in one way or another how unique the Valley is. The culture, the comradery, and the shared efforts to improve the quality of life for everyone in this region are just some of the special qualities of our community.

This past year, we have taken great strides to build an informed and engaged community. Last October, in partnership with Griffin Hospital, DataHaven, and with the support of several additional funders and all the major Valley nonprofits, we released the 2016 Valley Community Index: Understanding the Valley Region. This community-level data will be used to convene conversations, align efforts and investments, and collaborate on strategic endeavors to build, sustain,



and enhance the quality of life in the Valley. It's a mouthful, but we are confident that this report, and the excitement it has created, will prompt meaningful dialogue to address a broad range of needs and opportunities that exist in the Valley. We plan to update the Index every three years so that we can maintain an accurate pulse on our community's most pressing challenges and gauge the effectiveness of our collective efforts.

We know people want to help and impact the lives of Valley residents. As the Valley's leading philanthropic endowment, we have the knowledge and ability to assist nonprofits further their missions, help individuals with charitable ambitions, and professional advisors with their clients' overall financial and charitable strategy. In the coming year, we will roll out *the Valley Gives Back*TM planned giving initiative.

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This effort will serve as a resource for professional advisors, inform community members about how planned gifts can fit into their overall financial plan and how they can leave a legacy.

Many of our Valley nonprofits struggle to compete with the legacy development efforts of large alumnae associations, and national and international causes that are able to aggressively ask donors to be included in their estate plans. *The Valley Gives Back*TM will augment our local nonprofits' development capacity by reminding those that love the Valley to consider making an estate gift to causes they care about right here in our community.

We are delighted to share with you that we will receive the largest bequest in VCF's history. The donor's instruction in his will is to establish a fund in honor of his parents, which will support "the most important opportunities and needs of the Valley." This single fund will distribute more than \$60,000 annually, in perpetuity! Imagine what the Valley would look like if more people remembered our community in their estate plan!

While reading this annual report, you will learn that the recipe for a great community includes a number of different "fixings": collaboration, passion, knowledge, and a committed resolve to make a lasting difference.

At VCF, we believe that the most important ingredient is *you*. Your collaboration strengthens our shared impact, more than we could ever accomplish alone. Your collective knowledge better informs our community. Your passion is the catalyst for transformation. Your support makes action possible. Your resolve builds upon the vibrancy of this Valley.

We hope you will consider joining us at the table as we continue our collective work in fostering the spirit of philanthropy in the Valley.

Alan Tyma Sharon Closius

Board Chair President and CEO



Understanding Our Valley Community

An informed community is directly connected to the long-term good of the region, today and for generations to come. It is undeniable that we are all connected and what happens to the least of us happens to all of us. It's fair to say that what we want most of all is to continue to maintain and improve the quality of life for all residents.

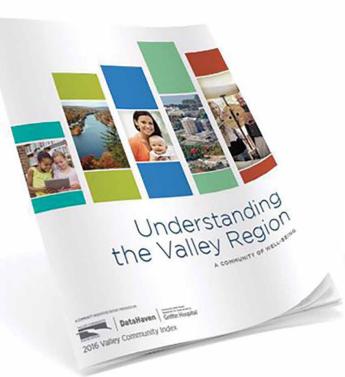
The Valley Community Index was released in October of 2016, along with the 2016 Spotlight, an executive summary of needs and opportunities in the Valley, which focuses on current socioeconomic trends throughout the 7-town region. The Town of Beacon Falls and the Borough of Naugatuck were added to the five core Valley municipalities of Ansonia, Derby, Oxford, Seymour, and Shelton, which encompassed the All-American City Award winning region for the year 2000. We are thrilled to have worked with more than 30 partner organizations – nonprofits, school systems, healthcare providers, municipalities, and many more – in creating this report.

A major component of the initiative was to provide the financial means to participate in the first ever state-wide wellbeing survey conducted by DataHaven. The purpose of the Well-being Survey was to produce statistical, and in some cases neighborhood-level, information on issues that are the most meaningful to our residents. The number of children graduating from our high schools or the percentage of third graders proficient in reading is objective data we receive from reporting authorities. But questions like: how safe do you feel in your neighborhood, or have you seen a dentist lately, or is your local government responsive to your needs, is subjective data that we can receive from well-being surveys.

The Valley's economic, educational, cultural, and health related assets present opportunities to improve the quality of life for its residents.

Examining the personal well-being of residents—that is, the degree to which all people in the Valley experience healthy, happy lives and realize their individual life goals—can help Valley leaders understand how to better direct their work for the greater good.

Levels of well-being are not evenly distributed across the population or across time. For example, during economic recoveries, unemployment may fall and incomes may rise for some, but not all groups. By considering a broad range of social, health, and economic issues as a society





Panelists from leading Valley organizations discuss the focus areas in the Index and the changing needs and opportunities covered in the full report. L to R: Patrick Charmel, Griffin Hospital; David Morgan, TEAM, Inc.; Christopher Clouet, Shelton Public Schools; Bill Purcell, Greater Valley Chamber of Commerce; Suzanne Reilly, TEAM, Inc.; Jack Walsh, Valley United Way.

changes, leaders can make informed policy decisions that benefit quality of life throughout the community.

The overall well-being in the Valley is similar to the rest of Connecticut. However, the well-being survey and community index data clearly show there are disparities among the Valley communities, which categorically affect education, employment, economic opportunity, health, and community life.

This Community Index* is meant to do more than just sit on a shelf. Here are just some examples of how this data is already being utilized to address our changing community:

- Griffin Hospital, as part of its Community Health Improvement Plan (CHIP), convened regional health care and social service providers to review key areas of focus for the coming years.
- VCF and its community partners have engaged local clergy members in meaningful dialogue with the objective of having regular meetings to address indicators highlighted in the Index.
- The Valley Council for Health & Human Services began framing its multi-year strategic plan to address local changing needs and opportunities.

The more that we know about our region, the better we are able to engage with each other in meaningful dialogues about the pulse of the Valley, and what actions are needed to create a more vibrant community. To learn more about the Community Index initiative, please visit our website at www. valleyfoundation.org.

A CHANGING POPULATION

Since 1990, the population increased by 12%, faster than CT. The Valley's minority population doubled.



AN AGING VALLEY

Over the next decade, seniors are projected to become the fastest-growing age group.



JOB GROWTH

The Valley is outpacing statewide job growth, and unemployment in the Valley is at its lowest since 2008. From 2002 to 2014, 2,500 new jobs were added in Valley towns.



Employment and Basic Needs

Do people feel the work they have is suited to their abilities?

Do they have adequate food and shelter?

Understanding the factors that make up personal well-being and quality of life

Community Life

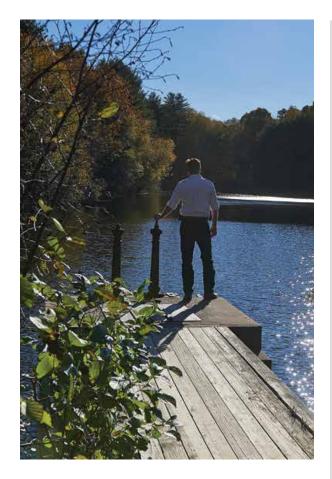
Do people have the support they need from families and communities? Do they trust government and neighbors?

*Buchanan, Mary, and Mark Abraham. (2016). Understanding the Valley Region: 2016 Valley Community Index. Derby, CT: Valley Community Foundation and DataHaven. Outcomes
How healthy do
people feel?

Do they have the resources (like health care) they need to maintain good health?

Socioeconomic disparities are rising, suggesting that Valley residents are not fairing equally well in their education, employment, health, and well-being.

Building Philanthropy in the Valley



Last year a number of Valley nonprofits met with VCF and shared how challenging it was to create unique planned giving programs. The consensus was that a rising tide does indeed float all boats and by working together, what is good for one will be good for all.

With this approach in mind, VCF will launch a community-wide planned giving initiative in 2017 called *the Valley Gives Back*TM. A key element of this initiative will feature a planned giving website, www.valleygivesback.org. This site will be a common-source of information for local nonprofits, professional advisors, and prospective donors, like you, who are interested in remembering the Valley in one way, shape, or form while creating their legacy.

YOUR LEGACY IS FOREVER

A legacy isn't only what you leave to the world. When you add a charity or charities in your estate plan, you create something powerful; a legacy that tells future generations what causes mattered to you. Your action will inspire others to follow your example and make a difference in their own way.

You can support the projects and people of the Valley and lend a hand to those providing everything from critical care to scholarships to unique cultural events. Planned gifts provide a means to achieve your goals and perpetuate your values. Your gift can be made available for current use to address the needs of today or endowed in perpetuity to meet the changing needs of our community for years to come. There are many ways for you to make a meaningful difference.

THE GATES SOCIETY AT VCF

The Gates Society is VCF's planned giving community. Joining is simple. Let us know you intend to remember VCF or one of our funds in your estate plan. The Society is named in honor of Ross and Frank Gates, the brothers of a prominent Derby family.

In 1938, the brothers created trusts in the family name benefitting The Community Foundation *for* Greater New Haven (TCF). Ross and Frank passed in 1952 and 1954, respectively.



The Gates brothers left directions for how their trusts were to be used— to support broad charitable purposes with consideration that the income benefit residents of Derby and vicinity.

TCF, through its stewardship of the Gates Fund and other activities, continues to be a responsible partner of VCF. Today, the Gates brothers' gift lives on by benefitting the Valley and its residents through the Valley Community Foundation. The Valley Community Foundation pays the same honor, respect and consideration to all our donors' philanthropic intention.

WANT TO LEARN MORE?

If everyone were to remember the Valley in their will or estate plan, what a difference it would make! There are several options for you to remember the Valley, many of which have no immediate impact on your existing cost of living or lifestyle. Contact VCF at (203) 751-9162 or speak with your trusted professional advisor to explore which planned giving vehicle is best for you.

VALLEY COMMUNITY FOUNDATION

Jates Society Members Include:

SHARON CLOSIUS

IANE COHEN*

JAMIE COHEN

WALTER AND BONNIE DROZECK

HELEN DUBRAVA*

BOB AND SHERI GRIER

WILLIAM AND JO-ANNA HOLDEN

HEIDI KAPLAN

LIZ KENNARD

LAURA LANE

ROBERT LANG

RAYMOND F. MACKOWSKI*

DOROTHY PALAZZI

BRAD AND MARIANNE SMYTHE

DONALD WARICHAR

JOSEPH WARICHAR

JOHN AND LAURA ZAPRZALKA

*deceased

"Do your little bit of good where you are. It's those little bits of good when you put them together that overwhelm the world."

- Archbishop Emeritus, Desmond Tutu



The Valley Community Foundation (VCF) is here to help you make a difference in the community and support the causes you care about. Every grant VCF makes is made possible from a gift from someone like you.

When you establish a charitable fund with us, you choose the name and purpose. Our commitment is to ensure your wishes are carried out. We offer various types of funds to reflect your specific philanthropic goals and ambitions.

In 2016, fourteen funds joined the VCF family. Each was established for a different reason and will help address a unique cause. We are proud to share their stories with you in this annual report. Please contact us if you would like to learn more about establishing or contributing to a fund. Together, we can find a solution that best fits your philanthropic plan and perpetuates your values.

DONOR ADVISED FUNDS

The easiest way to support the nonprofits and issues you personally care about in the Valley and beyond is through a Donor Advised Fund. Offering maximum flexibility, you recommend grants from the fund to any qualified public charity in the U.S. You can add to and recommend grants from your Fund at any time.



Nick Collicelli Legacy Fund

They say we have been blessed with two ears and one mouth to listen twice as much as we speak. Nicholas "Nick" Collicelli not only listened with his two ears; more importantly he listened with his heart. Nick left lasting impressions with his colleagues, students, family and friends through his quick wit, keen listening skills and genuine compassion. He had the uncanny knack of putting

those he encountered at ease, while consistently urging everyone to work toward the common good and "strive for the highest form of humanity."

Nick and his high school sweetheart Christine (Chris) were born and raised in the Valley. Married in 1974, Nick and Chris settled down to raise their own family, continuing to make the Valley their home for more than 40 years.

Throughout his 33 year career as an educator and administrator in the Hamden Public Schools, Nick worked constantly to bring diverse groups of people together. So in 2007, it was no surprise when Ansonia Superintendent of Schools, Dr. Carol Merlone, sought him out in his retirement to bring his inspirational message of acceptance for all in Hamden to the Ansonia Public Schools. Soon thereafter the award-winning Ansonia Human Relations Club, (HRC), modeled after Nick's earlier success in creating a Hamden HRC in the 80's, came to fruition, with Nick at the helm. The Ansonia HRC encapsulated Nick's message and its mission to "Build Leaders, Celebrate Diversity and Connect Generations," and has expanded to include the high schools and middle schools in both Ansonia and Derby.

Upon Nick's passing in 2016, his family created the Nick Collicelli Legacy Fund, a donor advised fund at VCF to support public charitable and

educational programs in the Valley. "This is truly a work in progress," said Chris. "Nick thought very highly of the Foundation and was grateful for all of the support he and the HRC had received from VCF throughout the years. We hope this Fund will help to continue Nick's inspiration to others to embrace our differences, reduce prejudice and promote tolerance for all."



Michael and Elizabeth Dalton Family Fund

A passion for life and helping others is the way many remember longtime Ansonia resident Michael Dalton. Even when he and his wife Elizabeth (Bonnie) retired to Narragansett, RI, their hearts remained with the Valley.

A public school teacher and administrator in Ansonia for 35 years, there are not too many residents who didn't have a run in with "Mr. Dalton" at some point, his daughter Sarah Muoio said. "He was a legend in Ansonia. Up until the day he died, he still had teachers calling him for advice. He was a great person to work with and work for."

Sarah specifically remembers her father once waking her in the middle of the night. They had to go to open the school; a house fire had just left one of his students and family homeless, and he was going to make sure they had a place to sleep. He later organized a fundraiser for this same family to help them get back on their feet.

"He did so much for the families of his students when he was a principal, and he was always in-

volved in the community because he wanted to be accessible to everyone," said Sarah.

Michael talked often during his lifetime about setting up a fund at the Valley Community Foundation, in order to support educational programs for Valley children who are less fortunate. After his passing, Sarah emailed VCF President and CEO Sharon Closius, who was quick to provide assistance with creating this fund to accept the flood of donations in her father's memory.

"Sharon was very sympathetic and encouraging for us, as we saw donations coming in. Our hope is that it can become a permanent fund in the coming years, so that we can carry out his wishes and continue his legacy for the generations who won't have the chance to meet him."



Katarzyna and Ludwik Zaprzalka Fund

Family philanthropy is something John and Laura Zaprzalka know quite a bit about.

Both have a long history of giving back to their community. John recently completed his term on the Board of Directors at the Valley Community Foundation at the end of 2016, after twelve years, which included a term as Board Chair. Laura volunteers weekly at their church.

John and Laura have established the Katarzyna and Ludwik Zaprzalka Fund – in memory of John's grandparents – the third fund in three years with the Zaprzalka name on it.

"When we were younger, we didn't have the money so we gave of our time and selves," John said. "Now that we are further along in our careers and our lives, we are fortunate enough to be able to invest some of our assets in the community, which will benefit the Valley for years to come."

In particular, this fund was inspired by the community support his grandmother received as a teenage immigrant from Poland (none of her own family accompanied her to the United States), and then later as a young widow, raising five children in Derby.

"In the early 1900's, there weren't a lot of health and human service agencies like there are now to help struggling members of the community. It was through the help of family, friends and neighbors that people received the support they needed. My father-in-law used to say that throughout his childhood there were always people looking out for him, showing him kindness and care," said Laura.

Like the past two funds created by John, Laura, and members of the Zaprzalka Family, this donor advised fund was established to ensure that the groups and organizations that were instrumental in supporting his family for the last 100 years can continue to do so for the next century and beyond.

"The beauty of the Valley Community Foundation is that we are able to support those groups and organizations that are near and dear to our hearts, and those of our parents and grandparents as well," said John. "We are now able to help even more organizations as they have become woven into the fabric of our family and our lives."

DONOR ADVISED FUNDS

Anonymous*

Kathleen and Mariano Adamo Community Service Fund John and Paraskeve Vartelas 'AGAPE' Fund Bassett Family Fund Monty Blakeman Fund Champagne Family Fund Cohen-DeToro Charitable Fund Jane C. and David B. Cohen Fund Nick Collicelli Legacy Fund* Connecticut Businesses Enriching Scholars Together (BEST) Fund Mary Lou Cicia Cook Memorial Fund Salvatore and Linda Tiano Coppola Family Fund Susan Coyle Family Fund Thomas and Ruth Curran Family Fund D'Addario Family Fund Michael and Elizabeth Dalton Family Fund* Derby - Puglianello Sister City Fund Walter and Bonnie Drozeck Fund Frey-Hershey Foundation Fund Mario Garofalo Family Fund Raymond Gildea Memorial Fund David M. and Gail A. Grant Family Fund Guarrera Family Fund Tyler, Brian and Zachary Haywood Fund Jones Family Farms Fund Kaplan Family Fund Paul and Gloria Konwerski Family Fund Edward and Laura Lane Family Fund Robert C. Lang Fund John Lauretti Memorial Family Fund Mary Fund William C. and Elaine N. Nimons Family Fund Joseph A. Pagliaro, Sr. Family Fund Palazzi Family Fund Pepe Family Fund President's Fund of the Valley Community Foundation Sophie and Robert W. Rapp Family Fund Samuel Rifkin Fund Anthony (Sonny) Savignano Memorial Fund Dorothy E. and Kenneth E. Schaible Fund Louis Schmecker, Jr. Memorial Fund Mary A. Schmecker Turtle Shell Fund Seymour Public Schools Fund Shelton CT Gaels Alumni Fund Shelton Education Endowment Fund Sterling Opera House Endowment Fund Carla and Sean Sullivan Charitable Fund Sally and Dominick Thomas Fund John Tyma Fund Nancy Valentine Fund Valley Bar Association Memorial and Commemorative Fund Valley Breast Health Care Fund Valley Pride Fund Alphonso and Eulalia Vitello Family Fund

Warichar Family Fund

Joe and Judy Zaprzalka Family Fund

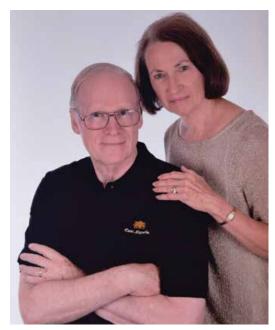
John and Laura Zaprzalka Family Fund

Katarzyna and Ludwik Zaprzalka Fund*

^{*} New Fund in 2016

DONOR DESIGNATED FUNDS

If you want to support a specific organization or organizations during your lifetime or endow your giving to a favorite nonprofit, a Donor Designated Fund allows you to name one or more organizations to receive an annual gift from your Fund.



Gerry Hellmann Eckhardt Fund for the Woodbridge Town Library

They say that books give wings to the mind and flight to the imagination. For lifelong learners like Gerry Eckhardt, her first memory of visiting a library stems back to Waterbury where, as a young girl, she would read anything and everything she could during the summer months at the Silas Bronson Library.

"My upbringing was modest, but my parents' value of education was paramount," Gerry said. "At an early age I developed a special appreciation for our local library and the opportunities it presented. Now, reflecting on this later in life, I believe that you're never too old to learn or to enjoy learning."

Gerry attended college for the first time during her 40's, where she pursued several degrees in education. She went on to become a grammar school teacher, perpetuating her parents' values and nurturing her students' passion for reading.

Libraries have always had a special place in Gerry's heart, ranging from service as the President of the Friends of the Seymour Public Library and volunteering as the librarian for Chatfield School. Gerry and her husband, Harvey, are also active members of the Woodbridge Town Library, where they have come to enjoy its engaging cultural programing.

No longer only archival repositories, libraries in the Valley and across the region continue to evolve into community centers with rich, educational programming. This Designated Fund will support adult cultural and arts programs that will help the library attract more patrons and provide alternatives to other local programs. "Through our fund I hope to support stimulating programs for adults in the same way I encouraged my children and students to enjoy learning," Gerry said.

"After a helpful conversation with Sharon Closius, establishing the fund was easy," Gerry said. "Both of my daughters are now grown and financially independent. I wanted to establish a fund at VCF to give back to the community as much as libraries have continuously given me throughout my life."



Walsh Family Fund

Jack Walsh is a firm believer in knowing where you came from. It is a belief that has guided him through his years of service to his hometown of Derby.

"I've lived in Derby my entire life, and I always will. And I've always said that if the people who live and work in a town don't have pride in it, don't expect that anyone else will."

Jack's dedication to the Valley region was evident in his role as President & C.O.O. of the Valley United Way, which he retired from in 2016, after 28 years of service. His support for this organization will now live on through the Walsh Family Fund, designated to support the Valley United Way in perpetuity, with one special exception.

"Each year, the Derby Neck Library can request funds to purchase books about Derby's history or the Valley region's history," he said, confessing both his passion for local history and a special appreciation for the Derby Neck Library. "I think we find a lot of the time that people in their own community don't know enough about its history. It's important to keep our stories and traditions alive."

Establishing a fund at the Valley Community Foundation, of which Jack was a founding Advisory Committee member, was just another way to support the region he calls home with an unwavering sense of pride.

"I think in other parts of the country, philanthropy can often be showy; people want to see their names on things," he said. I don't see that in the Valley. People here give because it's the right thing to do."

The designated fund is both a testament to his personal philanthropy as well as his confidence in the continuing success of the Valley, citing a partnership between VCF and Valley United Way over the years to support the health and vitality of the region as a whole.

"I think the combination of a strong United Way and a strong Community Foundation is important and good for everyone," said Jack.

DONOR DESIGNATED FUNDS

Edward J. and Marie M. Cecarelli Book Fund
Cohen Family Book Fund
Edward J. Cotter, Jr. Memorial Fund
Derby Public Library - Harold B. Yudkin Historic
Preservation Fund
Griffin Family Memorial Fund
Health Initiative for Men (HiM) Fund

Jones Family Farms Fund for the Connecticut
Agricultural Experiment Station

Maureen, Megan and Katey Ryan Fund Gary and Francesca (Riggio) Scarpa Fund for Center Stage Theatre

Dorothy E. and Kenneth E. Schaible Fund for the Boys & Girls Club of the Lower Naugatuck Valley Francis "Frank" M. Skoronski Memorial Fund Donald W. and Lillian C. Smith Family Fund Peter J. Vartelas Invest in Youth Fund #2 for the Valley YMCA

Gerry Hellmann Eckhardt Fund for the Woodbridge Town Library* Walsh Family Fund* Colonel Lloyd E. and Joan Platt Witmer Fund

* New Fund in 2016

"People here in the Valley give because it's the right thing to do."

ORGANIZATION AND FIDUCIARY FUNDS

Nonprofit organizations can set up either a permanent Organization Endowment Fund, which is a component fund of the Foundation, or an Organization Fund, which is for investment only. Both funds provide a stable source of distributable revenue for the nonprofit. On occasion, there are charitable projects that are not attached to a specific nonprofit organization and a "fiduciary" entity, typically a nonprofit, is named to accept the charitable donations and oversee the disbursements in order to fulfill the project.



Derby-Shelton Civil War Monument Restoration Fund

The history of our Valley community can be seen just about everywhere you look. Throughout the five towns there are monuments, plaques and memorials which commemorate the dedication and efforts of past residents.

"In 2011, three local Veterans Memorial sites were vandalized, and a total of four bronze plaques commemorating Valley war heroes were stolen from Ansonia, Derby and Shelton," said Jamie Cohen, who was President of the Valley Community Foundation at the time.

Jamie pledged that those crimes would not stand and, in response, the Foundation Board created a fiduciary fund to replace all plaques stolen from the damaged memorial sites. The response from the Valley community was remarkable; contributions provided more than enough to replace all four plaques. The small residual amount from that fund is the seed that will now support Jamie's latest effort to restore the Derby-Shelton Civil War monument that has stood on the Derby Green for the past 140 years, but has been neglected, vandalized, and is now in disrepair.

The monument's granite base was created and erected in 1877, and the bronze statue of a Civil War soldier was added in 1883. A series of bronze plaques on all four sides of the base contain the names of the 82 men of "Derby and Huntington" (as Shelton was then known) killed in action during the Civil War. The memorial is completed by cannons at each of its four corners.

Jamie explained, "The community responded once before for such a project, and I know we can do it again."

With funding from the Cities of Derby and Shelton, grants from VCF and its donors, and donations from residents and businesses, as well as historical societies and historical reenactment troops throughout the Valley and beyond, it is Jamie's hope that the restoration will be complete in 2017. Restoring this beautiful monument will honor the sacrifice of the soldiers, allowing the community to reflect on this historic treasure for the next 140 years, and beyond.





Plumb Memorial Tricentennial Fund

Part of the mission of Shelton's public library system is to ensure that residents keep up with our ever-changing society. The Plumb Memorial Tricentennial Fund has been established to assist the Library in achieving this goal.

"The Board of Directors decided in 1976, at the time of the United States of America's Bicentennial, to invest some of the Library's funds for 100 years," explained Barbara Glover, who was a Board member at that time. "The thought then was that a new library would be needed by the time the Tricentennial came along."

Plumb Memorial Library was originally built in 1895, but after only a decade, the Board of Directors felt it had outgrown its physical space. It would be almost another 80 years before the public would approve funding for an addition. Shortly after that time, the Board agreed to create this fund so that resources would be available the next time Plumb Memorial needed to expand. In 2016 the Library's current Board of Directors voted to transfer the assets into an endowed fund at the Valley Community Foundation.

Board Treasurer Aleta Miner said, "This is the second fund the Board has entrusted to VCF. The staff at the Foundation has the knowledge to provide guidance as we strive for specific goals. By partnering with VCF, our hope is that others will learn of this fund and contribute to it."

And in 2076, the Tricentennial of the United States, there will be a welcome source of fund-

ing for capital improvements or other needs the Plumb Memorial Library or Huntington Branch Library may have.

"The Library boasts a variety of historic items and periodicals, documenting Shelton's memorable events and people," Barbara said, mentioning that people come from all over the country to make use of the Library's materials as part of genealogy research. "As hard as it might be for some to believe, you can't find everything on the Internet. This Fund will allow us to help provide support for Library needs for years to come."

ORGANIZATION FUND

Anonymous Birmingham Foundation Fund Herbert M. Clark Fund Derby Community Endowment Fund Derby Public Library Endowment Fund Derby-Shelton Civil War Monument Restoration Fund* Housatonic Council, Boy Scouts of America Endowment Fund Housatonic Council, Boy Scouts of America Fund Oak Cliff Cemetery Association Fund Parent Child Resource Center Endowment Fund Planetree Fund Plumb Memorial Reserve Fund Plumb Memorial Tricentennial Fund* Recreation Camp Endowment Fund Ritchie Fund for Plumb Memorial Library Seymour-Oxford Rotary Club Fund Seymour Pink Endowment Fund Seymour-Oxford Nursery and Child Care Association (SONCCA) Fund Shelton Historical Society Endowment Fund TEAM, Inc., Richard J. Knoll Endowment Fund TEAM Reserve Fund Town of Seymour Endowment Fund Troop 3 - Derby BSA Alumni and Friends Fund Valley United Way Fund Valley YMCA Endowment Fund Peter J. Vartelas Invest in Youth Fund #1 for the Valley YMCA Veterans of Foreign Wars Post 597 Fund

* New Fund in 2016

Women In Networking Fund

SCHOLARSHIP FUNDS

You can help students pursue their educational dreams with a Scholarship Fund. Scholarship Funds are often created in memory of someone and can be used to support educational opportunities, a specific educational institution, or a course of study.



Stella Behuniak Fund

Some people give back to the Valley community in very public ways: by donating sums of money, volunteering their time at local organizations, or serving on Boards. Others do so in a quieter fashion, helping neighbors and providing a warm, welcoming space for children and teens living in the community. Such was the case for Stella Behuniak of Seymour.

Born in Ansonia, one of twelve children, Stella quit school at age 15 to help support her family, which she did until she married Peter at 21 and moved to Seymour, where they enjoyed the next 60 years together.

"She was a wonderful mother to her four children and a great Baba to her seven beloved grandchil-

dren," son Peter said. "Although she never went back to school, she understood the value of education and was always happy about the great foundation the Seymour school system provided us."

Stella spoke openly to her children about wanting to have her passing help a child in need in some small way. This came as no surprise for those who loved her because the Behuniak home had always been a hub for neighborhood children and classmates, including a number with special needs, who remain friends of the family to this day.

"Her idea was to use any donations, in lieu of flowers, to help a Seymour graduate with the cost of transition, whether that be to college or work or independent living," said daughter Christine Spak. Because the children are now spread throughout the state, they were not sure they could carry out her wishes, given the difficulty of making arrangements in time to notify people who might want to contribute in lieu of flowers. Christine first approached Seymour High School, who directed her to the Valley Community Foundation.

The Behuniak family had no familiarity with the Foundation prior to their mother's death. But any concerns were put at ease once they were in contact with VCF President and CEO Sharon Closius. They were thrilled that a small amount could be set aside – to award immediately in 2016 – as the family continues to grow the fund.

"We really appreciated VCF's flexibility," Peter said, "and it's a continuing source of comfort to know that our family will always be involved in some way, to ensure that the scholarship each year is presented in accordance with our mother's wishes."



Class of 1940 Scholarship Fund

Life's journey can take you to exciting new places, careers and adventures. But you never forget where you came from.

That was true for Dr. Franklin Behrle and Charles Spallino, two classmates and long-time friends who graduated from Ansonia High School in 1940 with local scholarships. That financial support helped them attend Dartmouth College in New Hampshire. Each man would graduate and go on to lead a prosperous life outside of the Valley.

Both men remembered the generosity of their hometown community, and in 1990, at the 50th reunion of the Class of 1940, they decided to start their own scholarship fund to support Ansonia High School seniors who would be attending a two-year or four-year college after graduation. Many of the remaining members of the Class of 1940 contributed to the fund, which began issuing scholarships in 1991.

"Initially my father set up the investment with Mass Mutual in Springfield," explained Jean Spallino Graziani. "Through the years I have helped him maintain the scholarship, but we wanted to ensure that the fund would continue to support Ansonia High School students in perpetuity."

Dr. Behrle has since passed away, and Mr. Spallino is nearing 95. Though he did not have a prior relationship with the Valley Community Foundation, he was aware of it and suggested that Jean reach out to VCF President and CEO Sharon Closius about setting up a fund.

"The whole process was great. VCF was very accommodating as we moved money over and worked with the school board to document everything going forward," Jean said. "My father was especially pleased when we learned that VCF would help remind scholarship recipients when it was time to reapply for additional support."

The scholarship is awarded annually to one graduating senior from Ansonia High School. Past scholarship recipients are also eligible for up to three more annual awards while attending college.

"Dr. Behrle and my father recognized that without the opportunity afforded to them via those scholarships, they would not have become the successful medical professional or business owner that they became. There's no better way to give back to the community than by paying it forward."



Eddy Conklin Scholarship Fund

While losing a loved one is never easy, it can be especially difficult when a young adult with a promising future is taken too soon. After the tragic car accident that took the life of Eddy Conklin of Shelton, his parents and sister received an outpouring of support from friends, neighbors and the community. Humbled by the response, Ed and Barbara Conklin, along with their daughter Ashley, began looking for a way to honor Eddy's legacy.

"We inquired about a scholarship fund in Eddy's name at Shelton High School, and numerous people recommended VCF," said Ed. "We wanted to be able to support fellow students at the high school, representing what Eddy's life was about."

Conklin said after speaking with VCF President and CEO, Sharon Closius, in addition to the organization's Board members, the family decided it was a good fit for what they wanted the scholar-ship fund to accomplish.

"Sharon and the staff at VCF worked with us to ensure that our wishes for our son's legacy were met," said Barbara, explaining that Eddy's passing was only a few short months before he was to graduate high school. "They recognized time was of the essence, since we wanted to award scholarships to graduates of Eddy's class."

The Conklin Family appreciated that VCF staff was understanding and compassionate during that difficult time, answering questions and making sure the fund agreement reflected all of the family's concerns. Two scholarships will be awarded from the fund each year to help graduating SHS students with education expenses.

"One scholarship is an academic scholarship, to be awarded to a graduating senior basketball player," said Barbara. "The other is a need-based scholarship, to be awarded to a graduating student pursuing a bioengineering field. These are what we want Eddy to be remembered for."

Ed says while the scholarships may be small at this time, the family's ultimate goal is to grow the fund to better assist graduating SHS students.



Charles P. Smith, Jr. Scholarship Fund

Shelton High School has entrusted many funds to the Valley Community Foundation over the years, for investment and management purposes. But none is quite as dear to Headmaster Dr. Beth A. Smith than the scholarship fund she began more than twenty years ago in memory of her father.

Charles P. Smith Jr. spent his career at Southern New England Telephone. After his retirement, he went on to become a professor of math at then Quinnipiac College. He was also an instructor at the Connecticut School of Electronics. In his spare time, he coached Little League in Hamden.

"My father was an educator and a coach. I was so proud to follow in his footsteps, as an educator and a coach as well. I want to be able to support graduating seniors in the Shelton High School softball program as they continue their education."

Dr. Smith remembers back when she was a teacher and assistant varsity coach at SHS, her father would come to games when Shelton played at Hamden or North Haven. She also remembers conversations with her father in the backyard, talking about pursuing their educational goals.

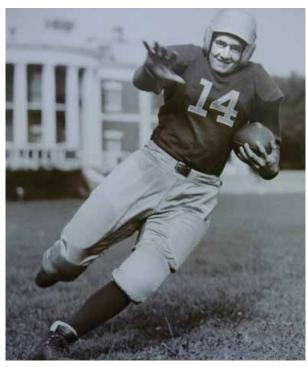
"My father always valued education. It's exciting and sentimental for me, every year, when I hand out the award in his honor. It still brings a tear to my eye and my heart skips a beat."

Dr. Smith was excited to surpass the minimum endowed fund requirement this year. She has worked with VCF President and CEO Sharon Closius to ensure that all funds benefitting Shelton High School students will remain viable well into the future.

"Our relationship with VCF has never been better; Sharon and her staff have been wonderful. I can pick up the phone and get answers to all of my questions in a very timely fashion."

She also appreciates the trust VCF has built over the years with the families and loved ones wishing to memorialize and fulfill the intentions of Valley donors, living and passed.

"My sole purpose in getting this accomplished was sustainability so that, when I retire and move on, I have the peace of mind knowing that these funds will continue to benefit our school and, most importantly, our students."



John "Al" Tiano Scholarship Fund

When John Tiano passed away in 2004, his daughters began a scholarship fund in his memory to support Derby High School athletes.

"He and my mother, Barbara Mongillo Tiano, were proud graduates of the Derby High School Class of 1938," explained daughter Linda Coppola. "Because of his athletic abilities, he was awarded a four-year scholarship to Manhattan College in New York. It was quite an accomplishment in that era."

John participated in football, basketball and track and field at Derby High School (DHS), and was a member of the legendary 1937-38 DHS basketball team known as the "Moxie Five". But he was best remembered for his skill and running style in football. He earned the nickname "Al" from his East Derby friends, after Yale University football star Albie Booth. John even received a letter of interest from the NFL's Detroit Lions, but instead chose to serve his country in the Army Air Corps during World War II.

To ensure that the scholarship will benefit DHS graduating seniors in perpetuity, Linda moved the fund over from a bank to the Valley Community Foundation.

"The staff at VCF made this transition very easy. They took the time to explain all facets of the fund. I am so pleased we made this decision." Linda also said she feels good knowing that the scholarship will distribute money each year to a worthy DHS graduate.

"My family and I want this fund to continue long after we are gone," she said. "We want to make sure that students who work hard and participate in more than one sport receive help in furthering their education, just as my father did. It made such a difference in his life, and we are so proud to honor his memory through this fund."

SCHOLARSHIP FUNDS

Michael J. Adanti Scholarship Fund Joseph 'Jay' Amico Artistic Memorial Awards Fund Ansonia Public Schools Scholarship Endowment Fund Ansonia Rotary Club Scholarship Endowment Fund Bruno Battaglino Memorial Fund Stella Behuniak Fund* Rachel and William Brogadir Scholarship Fund Stanley and Irene Chlebowski Scholarship Fund Stephen and Emily Chuckta Memorial Scholarship Fund Class of 1940 Scholarship Fund* Eddy Conklin Scholarship Fund* Lou and Dolly DeFilippo Scholarship Fund Derby High School Endowed Scholarship Fund Derby High School Non-Endowed Scholarship Fund Domorod-Youd Shelton High School Scholarship Fund Agnes and Helen Dubrava Fund Honorable Joseph P. Flynn and Family Scholarship Fund Francis Family Fund Geissler Family Scholarship Fund Brandon Giordano Football Scholarship Fund Traci L. Haines Memorial Scholarship Fund Arthur Hayes, Jr. Memorial Scholarship Fund Randall R. Holden Memorial Scholarship Fund Eugene Imperato Family Scholarship Fund Patricia M. Kondrath Scholarship Fund Frank J. Lang Fund Jesse McCord Lewis Memorial Scholarship Fund Michael R. McMahon Scholarship Fund Bernice Nicolari-Howard Gura Award Fund Ann O'Neil Memorial For Integrity Award Anthony Pagliaro Scholarship Fund Lillian Pawlowski Fund Joseph E. Potter Memorial Fund George and Beatrice Ryan Scholarship Fund John Sabulis Memorial Scholarship Fund Norman K. and Janet N. Santa Fund Shelton Education Endowment Fund Shelton High School Education Fund Shelton High School Endowed Scholarship Fund Shelton High School Non-Endowed Scholarship Fund Gaeton and Elizabeth Simonetti Family Fund Charles P. Smith Jr., Scholarship Fund* Howard Tassitano Fund Julian A. Taylor Fund

John "Al" Tiano Scholarship Fund* George Vartelas Ansonia High School Scholarship Fund Peter Vartelas Ansonia High School Scholarship Fund John J. Wabuda Memorial Scholarship Fund Joseph and Pauline Warichar Memorial Scholarship Fund Alexander George Wilson, Sr. Scholarship Fund

* New Fund in 2016

PREFERENCE FUNDS

Preference or Field of Interest Funds support evolving needs and a variety of nonprofits by focusing on a broad area of interest. This fund type supports interest areas such as education, childcare, environmental issues, healthcare, or specific geographic area(s). VCF makes grants to nonprofits that serve the donor's field of interest in perpetuity.

PREFERENCE FUNDS

Ancient Order of Hibernians, Derby Division Fund Lawrence J. DeTullio, Jr. Fund The Future Fund Herb Rollinson Fund Shelton Congregational Church Fund Mary Vartelas Stamos Fund Torbi-Saldamarco Family Fund Angelina M. and Valentina V. Vitali Fund Selma L. and Harold B. Yudkin Fund

UNRESTRICTED FUNDS

You can help us support emerging issues and the most pressing needs in the Valley by creating an Unrestricted Fund. As the needs in our communities change over time, Unrestricted Funds allow VCF to address high priority issues.



Raymond Mackowski Fund

When Raymond Mackowski passed away in March of 2016, he left behind decades of service and good works to his hometown of Ansonia and the larger Valley region. Therefore, it came as no surprise to his family when he included the Valley

Community Foundation as a beneficiary to his estate in memory of his parents, John and Amelia Mackowski.

"He was a private man, but he enjoyed life to the fullest," nephew Richard Mackowski said. "He was ready to help anyone in the community. He gave much of his time and talent to helping others. He was just a good man, that's really the best way to put it."

He was a man of many talents, from swimming to painting to metalworking. He was a dedicated volunteer at Yale-New Haven Hospital for over 30 years, was a member of the American Legion and the Knights of Columbus, a lifelong communicant of St. Joseph Church in Ansonia, and was a devoted history buff.

Attorney Christine Curtiss of Cohen and Thomas, Attorneys at Law said that when Raymond came to work on his will, he had already given a great deal of thought to making a gift to the Valley Community Foundation. She put him in touch with the staff at VCF, who helped determine the language to include in his will that would fulfill his philanthropic intentions.

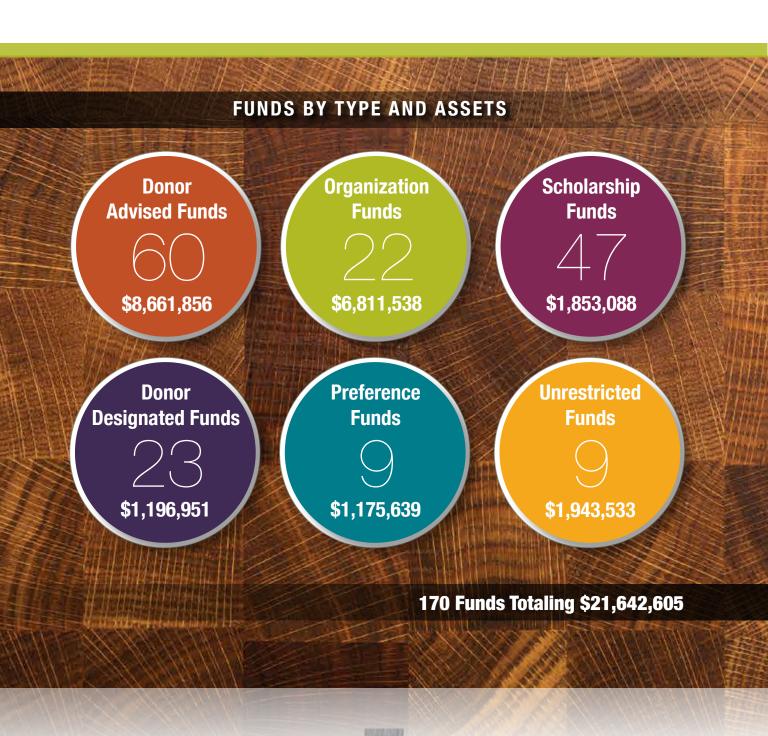
A bequest to a public charity like VCF has its financial incentives as well, Curtiss added. "Such a donation reduces the size of the estate, which may be subject to Connecticut's estate tax. It benefits not only an individual's estate, but the entire community."

"Some people may come in with a clear plan as to which causes they want their bequest to benefit; others haven't thought about it to that level of detail, but know they want to leave a gift to support their community," she said. "Either way, the staff at VCF is always available to help our clients make a decision that fits their philanthropic needs."

UNRESTRICTED FUNDS

Cohen Community Fund
Holy Trinity Greek Orthodox Church of Ansonia Fund
Raymond Mackowski Fund*
Dorothy E. & Kenneth E. Schaible Community Fund
Valley Community Fund
VCF Administrative and Reserve Funds

* New Fund in 2016



The Great Give 2016®

Gifts made by Valley residents, employees and VCF donor advised fund holders during The Great Give® 2016 resulted in more than \$312,600 for nonprofit organizations located in Ansonia, Derby, Oxford, Seymour or Shelton, including \$25,000 in matching funds and prizes provided by VCF.

The Great Give® is the annual online giving event, made available through giveGreater.org®, a local resource for learning and giving created in 2010 by VCF's partner in philanthropy, The Community Foundation *for* Greater New Haven to increase annual philanthropy in the Greater New Haven region of South Central Connecticut.

Overall, The Great Give® 2016 generated nearly \$1.4 million, including matching funds and prizes from the two foundations and other generous community sponsors for nonprofits serving the 20-town region of The Community Foundation *for* Greater New Haven, which includes VCF's fivetown service area. More than 8,000 donors gave over 11,500 gifts. To see participating nonprofits and prize information, visit www.thegreatgive.org.



A 36-hour, online-giving event on give Greater.org*









VCF President and CEO, Sharon Closius, presents awards to winning nonprofits that participated in The Great Give® 2016 at the annual ice cream social.



250+
nonprofit
organizations
that provide
services to
the Valley
participated in
The Great Give®
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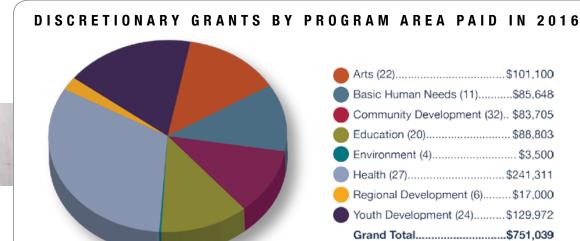
Skoronski

Benjamin Trabka

Trachtenberg

Bernard & Iris

Our mission is to make the Valley a better place to live and work, both now and in the future, by connecting private philanthropy to the long-term public good of the Valley.



Note: This data reflects grants made through the Responsive, Needs and Opportunities, and Community Grants processes, and includes previously committed multi-year grants. These grant programs would not be possible without the significant financial and staffing contributions provided by our partner in philanthropy, The Community Foundation for Greater New Haven.

Responsive Grant Program

VCF's annual Responsive Grants process is open to all requests for organizational support and projects that serve Ansonia, Derby, Oxford, Seymour and/or Shelton. These grants are generally awarded to address a nonprofit's operating, programmatic, or capacity building needs.

Area Congregations Together, Inc. – To provide general operating support for the provision of food, shelter, and support services to Valley people in need. **\$40,000**

BHcare – To support merger and systems integration costs with the Lower Naugatuck Valley Parent Child Resource Center. **\$40,000**

Boys and Girls Club of the Lower Naugatuck Valley – To support capacity building in the areas of marketing, development, human resources and staff leadership. **\$30,000**

Catholic Charities Archdiocese of Hartford -

To support the Outpatient Psychiatric Clinic, which promotes the emotional, psychological, and physical well-being of some of the Valley's neediest children, adolescents, and families. **\$20,000**

Center Stage Theatre, Inc. – To provide general operating support for growth and education through performing arts programming and participation in live theatre. **\$30,000**

Central Connecticut Coast YMCA – To provide general operating support for the Valley YMCA. **\$25,000**

Derby Day Care Center – To support the purchase of playground equipment. **\$20,000**

Griffin Hospital – To support the Advance Care Planning Program, which ensures that patients' choices at the end of their life are known and implemented. **\$20,000**

Housatonic Council, Boy Scouts of America – To provide general operating support for scouting programs for Valley youth. **\$30,000**

Naugatuck Valley Health District – To support Freedom2Breathe, which raises awareness about asthma and provides education about asthma to parents, caregivers, and workers in childcare settings in the Valley. \$30,000

Salvation Army – To support the Client Choice Food Pantry. **\$20,000**

Valley Emergency Medical Services – To support the replacement of a Life-Pak 15 Cardiac Monitor, a life saving tool utilized in its response to close to 6,500 requests for emergency paramedic service. **\$20,000**

The WorkPlace, Inc. – To support the Ansonia and Derby American Job Centers. **\$10,000**

Needs and Opportunities Grants

VCF made grants between \$250 to \$10,000 which contributed to and supported nonprofits and organizations serving the Valley community. The Needs and Opportunities grants are designed to promptly address the needs of our nonprofits through a simplified application process.

American Red Cross – SCC Chapter – To support the purchase and installation of smoke alarms to be place in the homes of Valley residents at no charge upon request. **\$10,000**

Christ Episcopal Church – To support administrative and operating costs to maintain and operate the Kathleen C.B. Samela Food Bank. \$10,000

Christian Counseling & Family Life Center –

To support the purchase of security equipment including cameras, a buzzer/intercom system, a burglar and fire system, panic buttons and sound proofing to increase the safety of employees and patients. \$4,000

City of Derby – To support the repair and restoration of the Civil War Monument on the Derby Green. **\$10,000**

Connecticut Council for Philanthropy – To support the Working Cities Challenge, an economic development effort that builds cross-sector collaboration and leadership to solve challenges affecting urban communities in Connecticut. **\$2,500**

Derby Neck Library Association – To support the building and installation of a new circulation desk for the lobby. **\$10,000**

Greater New Haven Coordinated Access Network – To support cold weather emergency shelter services for homeless individuals and families in the Valley from November 2016 through the end of March 2017. **\$10,000**

Housatonic Council Boy Scouts of America

- To support the replacement of the water heater and furnace at the Edmund D. Strang Scout Reservation. **\$1,700**

Mishkan Israel Day Camp – To support a summer day camp for underprivileged children from the Valley. **\$1,400**

New Haven Symphony Orchestra – To support performances in Shelton, which include Pops Concerts, Family Concerts, and the NHSO KidTix initiative, providing free tickets to students attending Pops Concerts. **\$5,000**

Online Journalism Project Inc. – To support the hiring of a consultant to create a business development plan for the Valley Independent Sentinel. \$10,000

Oxford Land Trust, Inc. – To support the Oxford High School Youth Conservation Corps student internship program. **\$5,000**

Seymour Ambulance Association – To support the purchase of new digital portable radios that are compatible with the Town's digital radio system. **\$7,960**

Seymour Public Schools – To support an educational field trip to historic sites in Philadelphia, Valley Forge, and Gettysburg. **\$2,792**

Shelton Youth Services Bureau – To support a youth development workshop series for program staff and teen youth workers from Valley agencies. **\$8,500**

Valley Emergency Medical Services – To support the replacement of advanced life support equipment bags as well as IV warmers. **\$5,000**

Valley Shakespeare Festival – To support the expansion of the Festival's Education Initiative to more grade levels and municipalities throughout the Valley. **\$2,000**

Community Grants

This application process recognizes smaller, volunteer or neighborhood groups with grant awards of up to \$2,500.

Annual Thanksgiving Basket Committee – To support the purchase of perishable and non-perishable food items for distribution of Thanksgiving baskets to fifty families in need. **\$2,000**

City of Derby, Bureau of Youth Services – To support "Before You Text," a new sexting prevention curriculum that will be taught in all schools and to parents. **\$2,500**

College Access for All Kids, Inc. – To support access to colleges, universities and other higher education possibilities for urban youth in Ansonia and Derby. \$2,500

House of Prayer – To support the distribution of food and clothing in the Valley. **\$1,550**

Restoring Hope Ministries, Hope House – To support the cost of Project Family Hope, which promotes family focused activities and experiences through various venues designed to build strong family bonds and relationships. **\$2,100**

Seymour Soccer Association – To support the cost of providing Futsal training to youth in the Town of Seymour and surrounding towns. Futsal trainings will help children develop their skills in the sport of soccer as individuals and as teammates. **\$2,000**

Shelton Farmers Market Association – To support the Shelton Farmers Market Association's awareness building effort through the printing of posters, postcards, banners, and lawn signs. **\$2,000**

Southford Falls Quilters LLC – To support classes, team workshops, speakers and instructors who will educate members and enhance quilting skills so members can produce completed quilts that they can "Show and Tell" at a quilt show. **\$2,500**

St. Joseph Catholic Church – Ansonia Parish Nurse Program – To support CPR and Automated External Defibrillator (AED) training, a Heart Wellness Education program, and the purchase of an AED replacement battery. **\$555**

St. Thomas Parish Nurse Program, Oxford – To support the purchase of an Automated External Defibrillator (AED), CPR and AED training, and Health and Wellness Education programs and screenings. **\$2,100**

Valley Deaf Club – To support expanding programs for sports and workshops for Valley Deaf Club members. **\$2,500**

Youth 2 Youth Peer Advocates – To support the cost of sending as many high school students as possible to the Youth 2 Youth National conference in RI. **\$2,500**

Sponsorship Grants

Nonprofit organizations can apply for support from VCF for up to \$2,500 for special events, especially those events that inform the community of a particular issue.

American Legion John Collins Post 24 – To sponsor one boy and one girl from Derby to attend the Boys/Girls State Program. \$600

American Legion Sutter-Terlizzi Post 16 – To sponsor one boy and one girl from Shelton to attend the Boys/Girls State Program. \$600

American Legion Gordon-Viselli Post 50 – To sponsor one boy and one girl from Ansonia to attend the Boys/Girls State Program. **\$600**

American Legion Post 124 – To sponsor one boy and one girl from Oxford to attend the Boys/ Girls State Program. **\$600**

Ansonia High School – To support a post prom event. **\$750**

Ansonia Rotary Club – To sponsor the recognition of Ansonia's Outstanding First Responders. **\$500**

Ansonia School Readiness – To sponsor the 15th Annual Ansonia Kick-Off to Kindergarten registration. **\$1,000**

Area Congregations Together, Inc. – To sponsor the 19th Annual Walk for the Hungry and Homeless. **\$1,000**

Association of Fundraising Professionals -Fairfield County Chapter – To sponsor the 2016
Best of the State Awards Breakfast. **\$500**

BHcare

- To sponsor the 28th Annual Bowl-2-Benefit The Umbrella Center for Domestic Violence Services. **\$1,000**
- To sponsor the Annual Gala. \$1,000

Boy Scout Troop 3 Derby – To sponsor the 92nd Annual Scout Gang Show. **\$500**

Boys & Girls Club of the Lower Naugatuck Valley

- -To sponsor the 15th Commodore Hull Thanksgiving 5K Road Race. **\$2,500**
- -To sponsor the John "Red" Larsen Golf Classic. **\$1,000**

Celebrate Shelton

- -To sponsor the Downtown Sounds Concert Series. **\$1,500**
- -To sponsor the Community Tree Lighting. **\$1,000**

Center Stage Theatre – To sponsor the Teen Musical Theatre Workshop. **\$1,000**

Derby High School PTO – To support a post prom event. **\$750**

Derby Historical Society

- To sponsor Celebrate CT Libations, a fundraiser for the Restoration Project of the David Humphreys House and Museum. **\$750**
- To sponsor the 26th Annual Appeal Reception.\$850
- To sponsor the Annual Silver Tea. \$500

Emil Senger Post 10 American Legion – To sponsor one boy and one girl from Seymour to attend the Boys/Girls State Program. **\$600**

Foundation for Life, Inc. – To sponsor Bikes for Kids. **\$1,000**

Greater Valley Chamber of Commerce – To sponsor Leadercast Greater Valley. **\$2,000**

Griffin Hospital – To sponsor the Annual Griffin Gala. **\$1,000**

Housatonic Council Boy Scouts of America – To sponsor the 3rd Annual Golf Outing. \$500

Junior Achievement of Western Connecticut, Inc.

- -To sponsor the 6th Annual JA High School Business Challenge. **\$1,000**
- -To sponsor the 20th Dr. George R. Dunbar Free Enterprise Hall of Fame Gala. **\$1,000**
- -To sponsor "Bowl for Kids." \$500

Kidnetic Clubhouse – To sponsor the 2nd Annual Parents' Play Date. **\$500**

Literacy Volunteers – To sponsor the 2016 Scrabble Challenge. **\$500**

Lower Naugatuck Valley Parent Child Resource Center – To sponsor the 5th Annual Pedal for PCRC. **\$1,000**

Mary A. Schmecker Turtle Shell Fund

- To sponsor the 3rd Annual Food Trucks in the Valley. **\$500**
- To sponsor the Soupstock Music & Arts Festival. **\$1,000**

Massaro Community Farm – To sponsor the Centennial Winter Concert featuring the Paul Winter Consort. **\$1,000**

Master's Table Community Meals, Inc. – To sponsor the 1st annual fundraiser and recognition event, "At the Hop". \$500

Moving with Hope

- To sponsor the 3rd Annual CT Bike for Hope. **\$500**
- To sponsor an indoor sports fundraiser to benefit those with severe neurological and orthopedic illnesses. \$250

North Star – To sponsor a Summer Picnic and Holiday Party for families who have children with disabilities. **\$2,500**

Northeast Organic Farmers – To sponsor its 34th Annual Winter Conference. **\$1,000**

Oxford Cultural Arts – To sponsor the Oxford Festival of Art, Culture, and Entertainment (FACE). **\$500**

Oxford High School Booster Club, Inc.

- To sponsor the Annual Oxford High School Festival of Trees. **\$250**
- To sponsor a post prom event. \$750
- To sponsor a town wide Summer Fest! \$500

Oxford Historical Society – To sponsor the Sheep-to-Shawl Festival to celebrate the restoration of a massive colonial barn loom. **\$500**

Oxford Land Trust, Inc. – To sponsor the 5K Trail Run and Guided Hikes at the Rockhouse Hill Sanctuary. **\$1,000**

Recreation Camp, Inc. – To sponsor the 100th Anniversary Picnic Celebration. **\$2,500**

Seymour Christmas Parade Association – To sponsor the 44th Annual Seymour Christmas Parade. **\$1,000**

Seymour Founder's Day Association, Inc. – To sponsor the 7th Annual Seymour Founder's Day. **\$2,500**

Seymour High School Post Prom – To sponsor a post prom event. **\$750**

Seymour Historical Society – To sponsor eight educational programs presented by the Society. **\$2,500**

Seymour Pink, Inc. – To sponsor the 5th Annual Pounding the Pavement for Pink 5K. **\$2,500**

Seymour Public Schools – To sponsor an anti-bullying, anti-substance abuse prevention program at Seymour Middle School, Bungay Elementary School and Chatfield-LoPresti Elementary School. **\$1,000**

Shelton Exchange Club Foundation, Inc. – To sponsor the 5th Annual Charity Indoor Mini Golf Tournament. **\$500**

Shelton High School PTSO – To sponsor a post prom event. **\$750**

Shelton High School Robotics Team – To sponsor a FIRST Lego League Robotics Competition. **\$1,000**

Shelton Historical Society

- To sponsor the Historical Society's 2017 educational activities. **\$1,000**
- To sponsor the Annual Antique Car Show.\$500

St. Mary St. Michael School – To sponsor the 8th Annual Housy River Duck Race. **\$500**

St. Joseph High School

- To sponsor the Maroon and Gold Gala. \$750
- To sponsor a post prom event. \$750

TEAM, Inc.

- To sponsor the 9th Annual Men Who Cook Fundraiser. **\$1,000**
- To sponsor the 12th Annual Toys 4 Kids Christmas Breakfast. **\$1,000**

Treasured Time

- To sponsor the Holiday Shopping Extravaganza/Wine Tasting Fundraising Event. \$250
- To sponsor the 3rd Annual Extra Innings Softball Marathon. **\$500**
- To sponsor the For Better or For Worse Fundraiser. \$250

United Methodist Homes – To sponsor the 8th Annual Wesley Village 5K Road Race, Kids Race, and FunWalk. **\$250**

Valley Council for Health and Human Services

- To sponsor the Annual Meeting. **\$500**

Valley Shakespeare Festival – To sponsor four free performances of the Taming of the Shrew. **\$2,500**

Valley United Way

- To sponsor the Valley United Way's High School Volunteer Council's 2nd Community Family Fun Day. \$2,000
- To sponsor the 3rd Annual Community Gala. **\$1,000**

Central Connecticut Coast YMCA – To sponsor the Valley YMCA 8th Annual Sunset 5K and 2-Mile Fitness Walk. **\$2,500**

Recognition Grants

The VCF Board of Directors recognizes the contributions of outstanding individuals and organizations that have been acknowledged for their service to the Valley Community. These honorees receive a grant from the VCF Board to donate to a Valley nonprofit of their choice.

Charles L. Flynn Humanitarian Award – Valley United Way

Ned Miller - Grant to Valley United Way

Gold Seal Awards – Valley Chamber of Commerce



L to R: Larry Janesky, Aleta Miner, Lynne Bassett Perry, Ross Mannuzza, Janice Sheehy, Ramon Peralta, and Jennifer Bull at the 2016 Gold Seal Award Ceremony

Lynne Bassett Perry (Gold) – Grant to the Valley Community Fund

Jennifer Bull (Gold) – Grant to American Red Cross, Connecticut Chapter, Grant to Valley United Way

Aleta Miner (Gold) – Grant to Friends of the Shelton (Plumb Memorial) Library

The Ansonia Nature Center Big Build (Silver) – Grant to Friends of the Ansonia Nature Center

Ramon Peralta (Gold) – Grant to Shelton Exchange Club Foundation, Inc.

Janice Sheehy (Platinum) – Grant to TEAM, Inc, to support Meals on Wheels, Grant to Valley United Way

Good Scout Award – Housatonic Boy Scout Council

Curtiss Ryan Honda – Grant to Housatonic Council, Boy Scouts of America

Women Making a Difference – Valley Women's Health Initiative

Linda Doczynski – Grant to St. Thomas Parish Nurse Program, Oxford

Janette Fedak - Grant to Master's Table

Esther Jones – Grant to Williams Temple Church

Jenn Moffat - Grant to Treasured Time

Bill Powanda – For being the co-founder and long-standing supporter of the Women's Health Initiative to support breast wellness. Grant to Griffin Hospital.

Anastasia Timpko – Grant to Three Saints Orthodox Church

In Recognition for their Service

Jimmy Ryan – In honor of his retirement and more than 40 years of service to the Valley Community. Grant made to support the Church of the Assumption Youth Ministry.

Valley Shakespeare Festival – For creative and innovative promotion of The Great Give® 2016 by performing at Plumb Memorial Library. Grant to Valley Shakespeare Festival.

Jack Walsh – In honor of retiring after 27 years of service at the Valley United Way. Grant to Valley United Way.

Donor Advised Grants

Grants from Donor Advised Funds are approved by the VCF Board of Directors upon the request and with the participation of the Donor. Donor Advised Funds are one of the many ways fund holders can advise on an area they are passionate about while partnering with VCF to make an impact.

Ansonia Public Schools Ansonia Rescue Medical Services Area Congregations Together, Inc. BHcare Birthright of Greater New Haven

Distributed the Valley

Birthright of the Valley

Boy Scout Troop 3 Derby

Boys & Girls Club of the Lower Naugatuck Valley

Charlotte's Web of Prayer

Christ Episcopal Church

Clark Memorial Library

Connecticut Forest & Park Association

Connecticut Hospice, Inc.

Derby Historical Society

Derby Public Library

Dimatteo Family Charitable Foundation, Inc. Eagle Hose #6

The Foundation School

Friends Center for Children, Inc.

Greater Valley Chamber of Commerce

Griffin Hospital

Housatonic Council, Boy Scouts of America Julian A Taylor Scholarship Fund Committee

Kids for Kids, Dancing for Life

Long Hill Burial Ground Ltd.

Millbrook School Development Office

Mishkan Israel Day Camp

National Right to Work Legal Defense

and Education Foundation, Inc.

Recreation Camp Inc.

Ronald McDonald House of CT, Inc.

Salvation Army, Greater Valley Corps

Seymour High School

Shelton Economic Development Corporation

Shelton High School

Shelton Historical Society, Inc.

Shelton Public Schools

Southbury Food Bank

St. Martin de Porres Academy

St. Vincent de Paul Society of Shelton, Inc.

Susanna Wesley School

TEAM, Inc.

University of New Haven

University of New Hampshire Foundation

Valley United Way

VARCA

Working Lands Alliance

Designated Grants and Organization Fund Transfers

Designated Funds are established by a donor(s) to benefit one or more specific nonprofit(s). In addition, VCF manages the endowment and reserve funds of several local nonprofit organizations.

Ansonia Public Schools

Ansonia Rotary Club

Assumption Church

Boys & Girls Club of the Lower Naugatuck Valley

Central Connecticut Coast YMCA

City of Derby

Connecticut Agricultural Experiment Station

Derby Public Library

Greater Valley Chamber of Commerce

Griffin Hospital

Housatonic Council, Boy Scouts of America

Lower Naugatuck Valley Parent

Child Resource Center

Oak Cliff Cemetery Association

Planetree, a Subsidiary of

Griffin Health Services, Inc.

Recreation Camp Inc.

Seymour Pink, Inc.

Shelton High School

St. Mary's Church

Storm Engine Company Ambulance Corps, Inc.

Town of Seymour

Trinity Cemetery Association

Trinity Episcopal Church

Scholarships

Scholarship Funds provide awards and scholarships to students chosen through a selection process at individual high schools, elementary schools or community organizations.

Academy of Our Lady of Mercy, Lauralton Hall

Amity Regional High School

Ansonia High School

Ansonia Public Schools

Assumption School

Boys & Girls Club of the Lower Naugatuck Valley

Bunnell High School

The Culinary Institute of America

Delaware Valley University

Derby High School

Derby Public Schools

DeSales University

Emmett O'Brien Regional Technical School

Hamden High School

Johnson and Wales University

Oxford High School

Salve Regina University

Seymour High School

Shelton High School

St. Joseph Parish - Angel Fund

West Haven High School

Unrestricted and Preference Funds

Unrestricted and Preference Funds allow the VCF Board of Directors to address a pressing need of an organization or community.

BHcare

Boys and Girls Club of the Lower Naugatuck Valley Civil War Monument Restoration Project

Derby Historical Society

Junior Achievement of Southwestern CT

New Haven Legal Association

Rape Crisis Center

Shelton Historical Society

Visiting Nurse Association

Stewardship of Charitable Assets



Bill Nimons Treasurer, Valley Community Foundation

The Community Foundation's consistent record of investment performance above market-benchmarks for more than two decades makes it an attractive and trusted option for endowments and endowment-like assets for our community's donors and nonprofits. While the Foundation's corporate portfolio performed below its targeted market benchmark for 2016, the net returns gen-

erated over more recent (3 years and 5 years) and longer-term (7 years and 10 years) periods are all significantly above the market benchmarks, as of December 31, 2016. Since the adoption of its investment strategy in January, 1995, the Foundation has surpassed its benchmark on an annual basis by 1.4% by generating an 8.4% net return for the 22 years just completed.

While 2016 was disappointing, the Foundation is a perpetual endowment steward, broadly diversified, with a global perspective and focused intently on the longer-term performance. In examining our

strategies, asset allocation, and underlying sub-advisors, the Foundation assesses rolling 3-year and 5-year market cycles, which for the past decade have all resulted in substantial excess return against our market-driven targets.

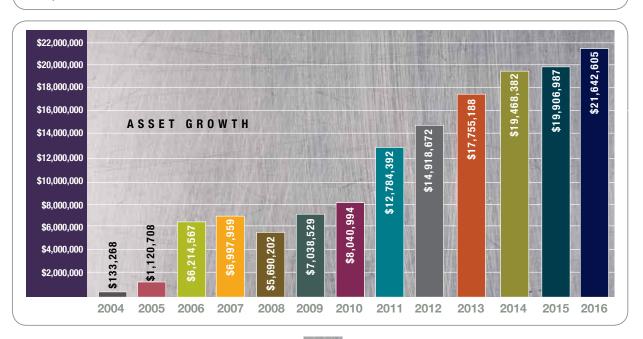
In review of the year just completed, as is done each year, an examination of the results not only against the markets but also against the peer universe. The Foundation's 3-year and 5-year performance have placed it in The Endowment and Foundation's (Investor Force) Survey among the top 5% of the universe. Looking out even further, the 7-year and 10-year results landed the Foundation in the top 10% of that Investor Force population.

Understanding the causes of a below-benchmark year are critical, but even more important is that analysis is essential for assessing opportunities going forward. We believe the divergence in the world's markets have created opportunities, and that our underlying sub-advisors are positioned well to meet those challenges. We thank you for the trust you have placed us, and we will continue to be the patient and diligent investor that has served our community and our nonprofits so well over the many years.

INVESTMENT PERFORMANCE Annualized return, expressed as a %, net of sub-advisory investment expense.							
	TRAILING 1 year	TRAILING 3 years	TRAILING 5 years	TRAILING 7 years	TRAILING 10 years		
Investment Performance Actual	4.2	5.4	9.7	8.2	5.7		
Market Benchmark ¹	5.8	3.3	7.3	6.4	3.3		
Value Added	(1.6)	2.1	2.4	1.8	1.4		

^{1.} The market benchmark is equal to the rate of return produced by specific market indices representing the asset classes contained in the asset allocation model, with such market indices weighted in accordance with that model.

Past performance is no indication of future results.



Fiscal 2016 in Review

Financial Position	2016	2015
Assets Cash and cash equivalents Investments at market value - component funds Investments at market value - organization funds	\$483,107 14,144,741 5,728,229	\$622,904 13,571,349 5,609,592
Total investments	20,356,077	19,803,845
Contributions receivable Other assets Furniture and equipment, net	1,200,000 4,196 82,332	4,890 98,252
Total assets	\$21,642,605	\$19,906,987
Liabilities and Net Assets Accounts payable and accrued expenses Organization funds Grants payable	\$7,637 5,728,229 276,250	\$3,085 5,609,592 396,702
Total liabilities Unrestricted net assets	6,012,116 15,630,489	6,009,379 13,897,608
Total liabilities and net assets	\$21,642,605	\$19,906,987

Statement of Activities	2016	2015
Revenue, Gains and Other Support Contributions Less contributions to organization funds	\$3,038,552 (90,274)	\$1,685,694 (67,375)
Net Contributions Investment gain, net	2,948,278 580,381	1,618,319 425,112
Total revenue	\$3,528,659	\$2,043,431
Expenses Grants approved, net Grants for program management and direct grant activities	1,449,233 309,061	1,447,659 227,936
Total grants expense Less grants from organization funds	1,758,294 (168,559)	1,675,595 (165,965)
Net grant expense	1,589,735	1,509,630
Development, donor services and fund stewardship Management and general administration	128,776 77,267	177,284 101,305
Total administration expense Total expense	206,043 1,795,778	278,589 \$1,788,219
Increase in Net Assets Net Assets - Beginning of Year	1,732,881 13,897,608	255,212 13,642,396
Net Assets - End of Year	15,630,489	\$13,897,608

2016 Councils, Committees and Volunteers

Board of Directors

Alan Tyma, Chair
Lynne Bassett Perry,
Vice Chair
Bill Nimons, Treasurer
Susan Coyle, Secretary
William Ginsberg
Robert Lesko
Jennifer Magri
Jimmy Ryan
Donald Smith, Jr.
Diane Stroman
John Zaprzalka

Board Advisory Council

Walter Archer, III
Bill Bassett
Al Cameron
Jamie Cohen
Tim Dillon
Rick Dunne
Peter Francini
Dave Grant
Liz Kennard
Ernestine Luise
Michael Marcinek
Frank Michaud, Jr.

Ned Miller Bill Miller, Jr. Dan Onofrio Fred Ortoli Ellen Pagliaro Joseph Pagliaro, Jr. Mary Pepe Kathy Riddle David Rifkin Ned Rydzy Ed Santa Kenneth Schaible Janice Sheehy Marianne Smythe Gregory Stamos Fred Stanek Karen Stanek Thomas Sutnik Leon Sylvester Pat Tarasovic Jack Walsh

Development Committee

Thomas Welch

Susan Coyle, *Chair* Robert Lesko Joseph Pagliaro, Jr. Lynne Bassett Perry Kathy Riddle Diane Stroman Marianne Smythe Alan Tyma

Program Committee

Lynne Bassett Perry, *Chair*Robert Lesko
Bill Nimons
Jimmy Ryan
Donald Smith, Jr.
Alan Tyma
John Zaprzalka

Community Grants Members

Liz, Kennard, Chair Janice Bonaparte Beth Carson Richard Knoll Aleta Miner Rachel Nichols Fred Ortoli Ray Oppel Angelika Stamos

Responsive Grants Community Reviewers

Marilyn Cormack Kathleen Cosgrove Robin DeJesus Jane Hull Ed Kisluk Richard Knoll Ruth Parkins Jane Snaider James Tickey

Finance Committee

Bill Nimons, *Chair* Jennifer Magri Diane Stroman

Governance Committee

Jimmy Ryan, *Chair* Jennifer Magri Donald Smith, Jr. Alan Tyma

2017 VCF BOARD AND STAFF



L to R, Seated: Donald Smith, Jr., Bill Nimons, Sharon Closius, Alan Tyma, Lynne Bassett Perry - **L to R, Standing** Beth Colette, Jen Magri, Marianne Smythe, Andrew Alden, Diane Stroman, Jimmy Ryan, Raymond Oppel, John Ready, Valerie Knight-DiGangi, William Ginsberg, Fred Ortoli - **Not Pictured:** Rob Lesko, Francis Michaud, Jr.

VCF THANKS THE FOLLOWING OUTGOING BOARD MEMBERS:





Susan Coyle John Zaprzalka

PARTNERS IN PHILANTHROPY

The Valley Community Foundation (VCF) partners with The Community Foundation for Greater New Haven (TCF) to carry-out TCF's mission in Ansonia, Derby, Oxford, Seymour and Shelton. This relationship provides VCF with access to the strength of TCF, which is one of the oldest and largest community foundations in the United States and remains the largest grantmaker to nonprofits serving a twenty-town region. TCF provides VCF with more than \$1 million annually to support staff and grantmaking. VCF shares a CFO and uses TCF's investment expertise, programming and development knowledge. This strong relationship provides VCF with an immediate support structure that allows its Board of Directors to focus on leadership and development.

VCF wishes to thank The Community Foundation for Greater New Haven staff and all the volunteers for their time, contributions and expertise.

Your Impact, Made Easy - Establishing a Fund at VCF

Our mission is to connect private philanthropy to the long-term public good of the Valley. Fulfilling your charitable wishes is central to our mission.

We will help you tailor your giving to fit your charitable goals and your personal situation. You may choose to give now or give later. Either way, we will ensure that your legacy and interests will be honored today, tomorrow and forever.

Our staff and board have deep local knowledge that helps determine the areas of greatest need and where our grants can be most effective. Your gift benefits from being part of a larger whole. Our funds are managed as part of The Community Foundation *for* Greater New Haven's (TCF) diversified investment portfolio. Over time, as the endowment grows, so do your funds and your ability to award grants. By investing your charitable gift with us, you are increasing the long-term impact of your gift.

The Valley Community Foundation offers several types of funds as referenced throughout this report. You can support an existing fund or establish a new fund with the use of cash, appreciated securities, IRA distributions and much more. You can help your community for generations to come by creating a permanent endowed fund.

STEP 1

Tell us how you would like your fund to be used. Would you like your gift to be flexible so that it can address any community problem or opportunity? Or, is there a specific charity or cause that you would like to support? Would you like to be involved in the grantmaking?

STEP 2

Tell us what you would like to name your fund. This will be your legacy: One hundred years from now, your fund will still be making grants. Or, you may set up the fund anonymously if you prefer.

STEP 3

Contact the office by calling (203) 751-9162 or visit us at 253-A Elizabeth Street, Derby, CT, and we will prepare the fund agreement that fits your philanthropic goals. All donations to the Valley Community Foundation are tax-deductible.

