

# CONNECTING TOGETHER ~ FOR EVER ~ FOR THE VALLEY



VALLEY COMMUNITY FOUNDATION 2013 ANNUAL REPORT





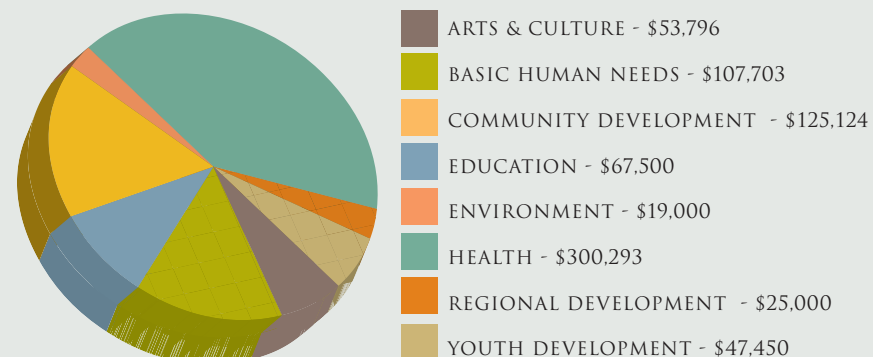
## FOR GOOD • FOR EVER • FOR THE VALLEY

*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.*

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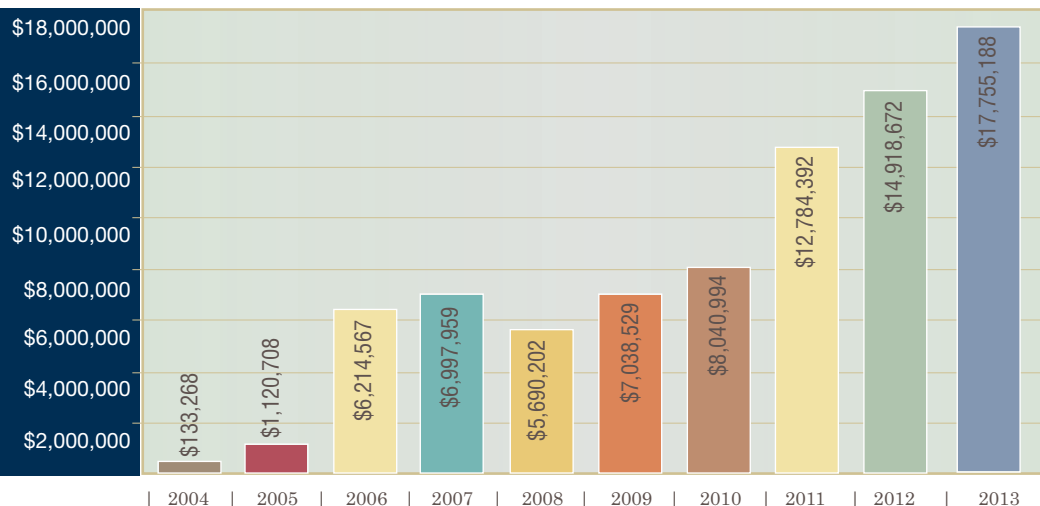
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### DISCRETIONARY GRANTS BY PROGRAM AREA PAID IN 2013



The chart above reflects grants made through the Responsive, Revolving Response, and Community Grants processes, and includes multiyear grants. See details on pages 24-29.

### ASSET GROWTH



# Connecting Together



Dear Friends-

We proudly share with you the 10th Annual Report of the Valley Community Foundation “Connecting Together – For Ever – For the Valley”. This past decade has been about connections made: valuable, long –lasting ties that bind us to each other and to this wonderful Valley community.

One attribute that has been used to describe the people of the Valley is that we are all connected in one way or another. This connectedness is the foundation for a beautiful spirit of caring for one another that is infused in the everyday life of Valley residents. It’s this spirit that makes the Valley a perfect setting for a community foundation.

Community foundations help build and strengthen a region by connecting people and organizations who want to make a difference. We do not do it on our own; we work with others who are passionate about what they do. We reach out to donors who want to make a difference through their funds and donations. We support nonprofits whose very mission is to implement change in our communities. We work to build an informed community about issues that matter. Together, we effect positive change in our Valley.

It was ten years ago that the Valley Advisory Council and The Community Foundation for Greater New Haven (TCF) agreed that the Valley had a community identity of its own that was powerful enough to support an independent community foundation. The Valley Community Foundation (VCF) was established as an Affiliate of TCF; it is through this connection that enables VCF to build a philanthropic community in the Valley. TCF supports VCF and undertakes its Valley philanthropy through VCF by providing staff support and making a large annual appropriation of unrestricted funds which allows us to advance our mission.

In 2013, VCF received over \$1.8M in gifts from individuals and organizations. Today, VCF has 128 funds with assets totaling \$17.8M dedicated to the needs of the Valley. This past year, we awarded a record \$1.3M in grants to nonprofit organizations who are making a difference in our communities.

Whether you live, work, and/or play here in the Valley, there is one constant that we all know and love – there is truly no other place like the Valley. We have made tremendous strides in our young history and look forward to a bright future. With your support, we will continue to grow our connections with donors, advisors, community leaders and nonprofits to make the Valley a better place for all of us.

Sharon L. Closius  
*President & CEO*

John J. Zaprzalka  
*Board Chair*

# Coming Together for Something Big

When donors establish a fund at the Valley Community Foundation (VCF) they share with us their philanthropic interests and passions whether general or specific. They are part of the community's permanent endowment, part of something big.

When VCF receives a strong grant request from a local nonprofit, the Foundation staff looks to our fundholders to see if there is a fit with their philanthropic interests. Partnering together on grantmaking leverages our fundholders' grantmaking capacity as well as the Foundation's discretionary pool of dollars.

This year, two major projects were made possible thanks to Donor Advised fundholders who came together to create a major impact in the community. The D'Addario Family Fund supported an after school program in Ansonia and several fundholders—The Palazzi Family Fund, the Joseph A. Pagliaro, Sr. Family Fund and the John and Paraskeve Vartelas "Agape" Fund—helped the Red Cross purchase contents to stock a Disaster Initial Response Trailer to better serve local residents in case of a disaster.



## THE IMPORTANCE OF HOMEWORK SUPPORT

Thanks to the D'Addarios, homework is being done more frequently by Ansonia middle school students. The after-school Charger Club at Ansonia Middle School serves more than 90 students.

The Club invites students to participate based on their CT Mastery Test scores. The Club takes students with both high and low scores with the goal to improve the low test scores, and to provide leadership to those with high scores. After school, students do their homework in an informal and supportive setting.

There is also a parent component which is very important to building the child's self confidence and improving his/her academic experience. At the weekly parent sessions, all the students and their parents eat dinner together as a group to learn about and discuss different topics.

When the Charger Club was faced with a major reduction in funding, they put in a grant request to Foundation staff. VCF presented the need to Tom D'Addario, founder of the D'Addario Family Fund.



# Coming Together for Something Big

“This sounded like an important program. It’s having an impact on these kids,” says Tom D’Addario, “and that’s why we were happy to help.”

## EMERGENCY SHELTER FOR THE VALLEY

Also this past year, a new Red Cross Disaster Initial Response Trailer is ready to set up an emergency shelter anywhere in the Valley thanks to a grant from VCF fundholders. The Red Cross approached the Valley Community Foundation to support the contents of an emergency trailer that will be used to transport all the necessary equipment needed to set up a temporary shelter in case of an emergency.

The trailers are weather resistant, easy to move and filled with cots, blankets and comfort kits used to set up emergency shelters during a disaster such as a major power outage, flood, tornado or large fire.

The project was possible thanks to the Palazzi Family Fund, the Joseph A. Pagliaro, Sr. Family Fund and The John and Paraskeve Vartelas “Agape” Funds, as well as VCF's Unrestricted Fund.

Supporting this Red Cross project was appealing because “we want to help keep people in the Valley safe,” says Michelle Pagliaro Haywood. Michelle and her brother Joe Pagliaro, Jr. started the Joseph A. Pagliaro, Sr. Family Fund in memory of their father.

“We know that this piece of equipment will help people here in the Valley for years to come,” said Greg Stamos, one of the founding fund advisors of the “Agape” Fund.

“We certainly see this as an asset to the community,” says Red Cross Chief Communications Officer, Paul Shipman, “and it’s the generosity of the donors that makes this possible.”



*“I keep reading about these disasters happening all across the country and I’d like to make sure the Valley is prepared, because the Valley is such a tight-knit community, when there’s a problem it really hits home.”*

*~ Dorothy Palazzi, Fund Founder  
Palazzi Family Fund.*





# Beyond Grant Making

Together with our donors, we strive to ensure the Valley's nonprofits are strong and stable. We go beyond grantmaking: whether it's helping nonprofits build their technical expertise through workshops that strengthen their staff and boards; providing them with the opportunity to invest in a diversified, professionally managed investment pool; or by sponsoring an online giving event—The Great Give. Our goal is to help our nonprofits become more sustainable so they can better fulfill their mission for the people in the Valley.

## TECHNICAL ASSISTANCE FOR OUR NONPROFITS

In 2013, The Valley Community Foundation (VCF) expanded its technical assistance program, and together with The Community Foundation for Greater New Haven (TCF), offered several workshops throughout the year. One example, "Purposeful Boards, Powerful Fundraising" was attended by 73 people representing 20 nonprofits from throughout the Valley and Greater New Haven. Designed for Board-Staff teams, this practical hands-on session addressed the complementary roles Board members play in their organization's governance and resource development. The session began with a close look at Board recruitment, structure, operations and culture, knowing that strong boards dramatically affect the nonprofits they serve. The second part of the session focused on how to involve Board members in effective fundraising.

Additional workshops, which were attended by more than 150 Valley participants, featured a general grants orientation, and addressed the "nuts and bolts" of grant writing as well as "Grant Writing 201." VCF and TCF will continue to partner together in the future to provide technical assistance on topics of interest to nonprofits, such as succession planning, strategic planning, long-term sustainability and effective fundraising.



*A special component of the purposeful board workshop included one-to-one consultant follow up with several nonprofit boards and staff. TEAM, Inc. and the Lower Naugatuck Boys and Girls Club tackled issues that had been discussed in the workshop and then addressed them with consultant Bob Serow back in their respective organizations. VCF plans to offer further one-to-one assistance to Valley nonprofits in 2014.*

## INVESTMENT MANAGEMENT AND EFFECTIVE STEWARDSHIP

After the "great recession" of 2008-09, many nonprofits refocused on the importance of having an endowment or reserve fund to sustain their operations during difficult times. A central component of managing these funds is the importance of prudent investment management and effective stewardship over these longer-term resources. Many nonprofits seek to access this technical expertise through external partnerships with community foundations.

Through VCF's affiliation with TCF, the Valley's nonprofits have the opportunity to participate in the commingled investment management along side the two foundations' own endowment. The VCF and TCF have a long-held belief that this collective investment process provides economies of scale and other benefits that may not be available to nonprofits on a low cost basis, thereby enhancing the region's charitable capital. VCF strongly believes that the creation of Permanent Organization Endowment Funds and Organization Funds (which always remain the assets of the nonprofit), are integral to our philanthropic mission.

# Beyond Grant Making

## THE GREAT GIVE 2013

Another exciting way VCF has worked to build nonprofits' capacity is through The Great Give, an online 36-hour giving event that benefits nonprofits serving the Greater New Haven region. The Great Give helps nonprofits diversify their donor base and raise their profile among the community.

The Great Give 2013 was a huge success: Valley donors raised more than \$100,000 in donations from 708 gifts for Valley nonprofits! TCF has hosted The Great Give for four years; this was VCF's second year participating.

Prizes were awarded during a celebratory ice cream social at Shelton's Plumb Memorial Library. In addition to gifts from donors, VCF distributed \$26,500 in matching funds and grant prizes to incentivize giving. Participating Valley nonprofits were also eligible to receive awards from TCF's \$125,000 prize pool.



### The following nonprofits received donations through The Great Give 2013 from individuals who live or work in the Valley:

Amity Teen Center  
 Ansonia Community Action  
 Ansonia Public Schools (3)  
 Ansonia School Readiness Council (2)  
 Area Congregations Together (30)  
 Ball & Socket Arts (2)  
 Beth-El Center (3)  
 Bethesda Nursery School  
 BHcare (41)  
 Boys & Girls Club of New Haven (4)  
 Boys & Girls Club of the Lower Naugatuck Valley (23)  
 Cancer Support Community of Southern Connecticut  
 Catholic Charities  
 Archdiocese of Hartford  
 Center Stage Theatre (186)  
 Central Connecticut Coast YMCA (2)  
 Christian Counseling and Family Life Center (9)  
 CitySeed (2)  
 Columbus House (2)  
 Community Fund for Women & Girls  
 Connecticut Forest & Park Association  
 Connecticut Fund for the Environment (Save the Sound)  
 Connecticut Trust for Historic Preservation  
 Connecticut Voices for Children  
 Creative Arts Workshop (2)  
 DataHaven  
 Elm City ChamberFest (4)  
 End Hunger Connecticut

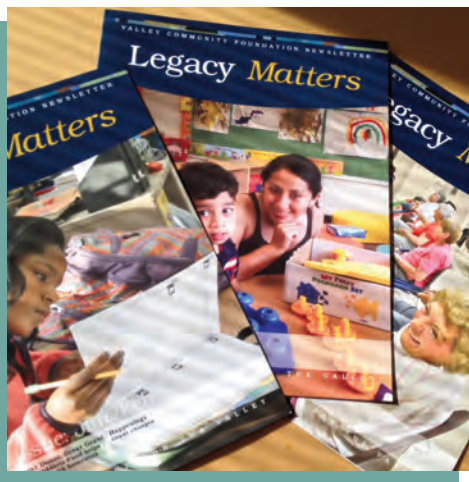
Fair Haven Community Health Center (2)  
 Friends of the Ansonia Nature Center  
 Friends of the New Haven Animal Shelter  
 Gateway Community College Foundation (2)  
 Get In Touch Foundation (4)  
 Good Shepherd Day Care Center  
 Griffin Hospital  
 Higher Heights Youth Empowerment Programs  
 Horizons, Inc.  
 Housatonic Council, Boy Scouts of America  
 Housatonic Valley Association  
 Hygeia Foundation  
 IRIS-Integrated Refugee & Immigrant Services  
 Life Haven  
 Literacy Center of Milford  
 Literacy Volunteers of Greater New Haven (4)  
 Lower Naugatuck Valley Parent Child Resource Center (43)  
 Marrakech  
 Mary Wade Home  
 Massaro Community Farm  
 Music Haven (7)  
 Neighborhood Housing Services of New Haven  
 Neighborhood Music School (5)  
 New Haven Ballet (2)  
 New Haven Chorale (2)  
 New Haven Diaper Bank (2)  
 New Haven Ecology Project (Common Ground) (4)  
 New Haven Folk  
 New Haven Home Recovery (2)

New Haven Legal Assistance Association  
 New Haven Leon Sister City Project  
 New Haven Preservation Trust  
 New Haven Reads Community Book Bank Inc. (2)  
 New Haven Symphony Orchestra (11)  
 R Kids Family Center  
 Rape Crisis Center of Milford  
 Read to Grow  
 SARA Foundation  
 Seymour-Oxford Nursery & Child Care Association  
 Shelton Economic Development Corporation (4)  
 Shelton High School Robotics Team (34)  
 Shelton Historical Society (23)  
 Shelton Land Conservation Trust (12)  
 Solar Youth  
 Squash Haven  
 TEAM (62)  
 The Salvation Army (Greater Valley Corps) (4)  
 Valley Arts Council  
 Valley Community Foundation (3)  
 Valley Independent Sentinel (Online Journalism Project) (23)  
 Valley United Way (19)  
 Valley YMCA (7)  
 Visiting Nurse Association of South Central Connecticut  
 VNA of South Central CT  
 Wesley Heights  
 West Haven Child Development Center (4)  
 Whitney Players (5)  
 Women of Power Network  
 Woodruff Family Y in Milford  
 WorkPlace

# Building an Informed Community

In recent years the news landscape has shrunk dramatically, leaving fewer opportunities for Valley residents to be informed about the issues and opportunities in our community. An informed community ensures meaningful citizen engagement and participation in the issues that affect the welfare of the region. An informed community is better able to make educated decisions about the issues facing the community, and where and how to spend time and resources to have the greatest impact.

To have a vibrant Valley, we need to be engaged and informed. That's why VCF produces a new bimonthly newsletter, Legacy Matters; provides operating support to the Valley Independent Sentinel, an online-only newspaper that covers Ansonia, Derby, Oxford, Seymour and Shelton; and awards sponsorship grants to groups that teach and inform the community about important issues.



## LEGACY MATTERS

Every issue of our new newsletter, Legacy Matters, takes an in-depth look at one topic affecting the Valley.

The first newsletter focused on the work that Valley organizations are doing to help families access early education. Early education, like pre-school, is expensive but critical to childhood development and learning. We've also looked at the complicated causes of homelessness and how Spooner House—the Valley's only homeless shelter—partners with area experts to provide clients with services tailored to their needs.

## VALLEY INDEPENDENT SENTINEL

In 2012, VCF made a three-year grant that offered financial stability to the Valley Independent Sentinel, an online newspaper with two full-time reporters who cover the news and events of the Lower Naugatuck Valley.

The paper focuses on matters of public importance, such as election coverage and policy debates at town meetings, in an engaging and useful manner. Coverage is also determined based on readers' requests. For example, during the blizzard of 2012 the Sentinel created a map of streets that hadn't been plowed, based on reader submissions.



*Unlike corporate media the Sentinel's nonprofit status means it can place sensationalism with nuance and context. "Our biggest challenge is getting people to understand that we're a nonprofit and, even though we don't have printing costs, there are costs to creating our content."*

*~ Eugene Driscoll, Editor,  
Valley Independent Sentinel*

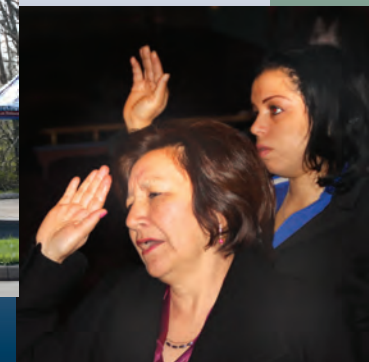


# Building an Informed Community

## EVENTS AND PROGRAMS

In addition to keeping our donors informed, many of our sponsorship grants help educate the community through events. This year VCF sponsored 50 events and programs in and around the Valley, many of which raised issues, fostered community development and supported education, basic human needs, and health and arts appreciation. For example, VCF sponsored an informative workshop about the new Connecticut law allowing the legal sale of medical marijuana. Our sponsorship grant to BHcare allowed the Greater Valley Substance Abuse Action Council to offer the workshop, “Medical Marijuana: How will it affect your workplace and community?”

Thanks to additional sponsorships from VCF, emergency responders across the Valley practiced their preparedness skills and received feedback during a mass casualty drill; Oxford High School ran an all-day anti-bullying event; immigrants became citizens at the International Institute of Connecticut's Annual Naturalization Ceremony, and Teens in Seymour learned about the dangers of distracted driving.



## Making a Difference Your Way

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

When you establish a charitable fund with us, you choose the name and its purpose; our job is to make sure your wishes are carried out. We offer different types of funds to reflect your different philanthropic goals.

- **Donor Advised Funds** make it easy for you to actively participate in your charitable giving. You recommend what qualified nonprofit organization you want to support anywhere in the United States. You can have a single advisor or you can have an advisory committee, such as family members, or colleagues for a cause. This fund type takes the place of establishing a private foundation.
- **Donor Designated Funds** are ideal when you want to support one or more of your favorite nonprofits in perpetuity. This is not just a monetary gift; it's a gift of stability for the organization. You can also designate a fund to give scholarship money to one of our local schools.
- **Preference Funds** address an area of your personal interest in the community, such as early childhood education, hunger, homelessness, or a specific community such as Ansonia, Derby, Oxford, Seymour, or Shelton.
- **Scholarships Funds** support the educational advancement of students based on criteria of your choice. A selection committee (usually within the school system) reviews applications and makes the selection based on your criteria.
- **Unrestricted Funds** allow you to ensure that your charitable giving is addressing the most pressing needs and opportunities in the Valley both now and in the future.
- **Permanent Organization Endowment Funds and Organization Funds** are established by nonprofits to benefit their organization. The difference between these two closely named fund types is one is a permanent component fund of VCF and the other is a fund which is solely invested in the Foundation's investment portfolio. Nonprofits have different needs for ensuring their endowment or reserve fund is properly managed and VCF is here to support their needs.

In 2013, seven funds joined the VCF family. Each was established for a different reason and each will help address a different cause. We are pleased to share with you the stories of these new funds.

## TEAM Reserve Fund



Best practices for nonprofits span everything from having effective input from a diverse and engaged Board to hiring enthusiastic and qualified staff that is able to help the organization carry out its mission. One part of this equation also includes an organization's ability to sustain itself during a challenging economic period by having a reserve account available for use.

"Throughout the past 20 years, TEAM, Inc. in Derby has been slowly and steadily developing its own reserve account, and has chosen VCF to

administer this account by creating the TEAM Reserve Fund at the Foundation," said TEAM President Richard Knoll. "We had been exploring investment options for this fund for several years, and asked VCF's President Sharon Closius to come and make a presentation to the Board," said Richard. "She articulated how the Fund would work, and was able to answer the questions we had. She clearly stated that past results are not indicative of future performance. Our Board and staff further examined all the benefits and risks, and determined that VCF was the best partner for us."

VCF's funds are invested with The Community Foundation for Greater New Haven (TCF), which has more than \$430 million in charitable assets, and operates a very diversified and long-term approach to funds' management. The assets are managed with a "total return approach" to generate enough current distributable revenue to respond to charitable needs, while providing for long term growth. "We, as an organization, do not have the charitable investment management expertise – but TCF truly does. The fees are low, we have the ability to access our Fund as we need, and the fact that VCF is local were all key factors in our decision making process," said Richard.

The TEAM Reserve Fund at VCF not only prudently manages invested charitable dollars but also provides a stable and predictable source of funding in times of need for this organization.



## Troop 3 - Derby BSA Alumni and Friends Foundation Fund



Founded in 1914, Boy Scout Troop 3 in Derby is one of the oldest Boy Scout Troops in the country. It has enjoyed a long and storied tradition of excellence and success; nearly 300 of its scouts have achieved the Eagle Scout Rank, the highest rank in Scouting! A group of Troop 3 alumni and friends established the Troop 3 – Derby BSA Alumni and Friends Foundation (Troop 3 Alumni Foundation) to give scouting friends and Troop 3 alums the opportunity to contribute to scouting activities, including camperships to attend summer camp at the Edmund D. Strang Scouting Reservation, aid for its annual International Scout Exchange Program, and general operating support for Troop 3 expenses.

The Board of Directors of the Troop 3 Alumni Foundation began a search for a way to properly manage the Foundation's assets. They turned to VCF to create the Troop 3-Derby BSA Alumni and Friends Fund which will provide a two-fold benefit: 1) the assets will be invested in a diversified portfolio, and 2) the Troop 3 Alumni Foundation will gain further exposure by being part of VCF's Fund Family.

"Establishing the Fund at VCF was an easy choice for us," said Troop 3 Alumni Foundation Treasurer Ray Oppel. "VCF is the Lower Naugatuck Valley's premier nonprofit foundation with a wonderful history of prudent financial management. It's also perfect timing -- it will help us kick off our 100th anniversary celebration in 2014, and help to spread additional awareness about Troop 3 throughout the Valley."

Although the troop was founded in Derby, its membership has been consistently comprised of youths from all of the Valley towns. "The Valley community has always been supportive of our mission of building character, fostering citizenship, and developing physical fitness," said Troop 3 Alumni Foundation President Randy Ritter. "Working with VCF allows us to focus on our mission of providing direct service to our scouting community. The Scout Motto is "Be Prepared" and as we begin our second century of Scouting in the Valley we hope that Troop 3 Alum and friends will help us to be prepared for the future financially so that our scouts will always have the opportunity to attend camp and participate in a wonderful exchange program with their peers from England and Ireland."

*"Establishing the Fund at VCF was an easy choice for us"*

*~Ray Oppel, Treasurer, Troop 3 Derby BSA Alumni and Friends Foundation*



## CT Businesses Enriching Scholars Together “BEST” Fund



Terry Jones and the Jones Family Farm of Shelton established the CT BEST Fund at the Valley Community Foundation (VCF) as a vehicle for collective giving to provide children from low-income families a preschool experience.

Terry sits on the CT State Board of Education and understands the importance of a preschool experience. His vision is to bring together the private sector (businesses as well as individuals) to collectively help children from families whose socioeconomic situation

impacts their ability to provide a quality preschool experience for their children. Research has shown that a child who does not have a preschool experience, begins Kindergarten on unequal footing with little hope of catching up. The cost to the school district for remediation only grows with time and the disparity contributes to CT's achievement gap, which is the largest in the country.

“A few years ago, we were asked to adopt a street in Shelton – to be responsible for cleaning up roadside trash, etc.,” said Terry. “It struck me that if we could adopt a street and make an impact, maybe we could get the business community to “adopt” kids who would not otherwise be able to attend preschool.

The Jones Family has a long standing relationship with the Susanna Wesley School in Shelton and Terry approached Roberta Cenci, Executive Director of the school about running a pilot program at the prestigious Shelton preschool. Roberta and her board were honored to be asked and happy to be involved.

Terry began putting his Advisory team together and asked Roberta Cenci, David Morgan, Vice President, TEAM Early Childhood, and Bill Purcell, President of the Valley Chamber to help make an everlasting difference in a child's life. The group has already developed great partnerships with the Boys and Girls Club and TEAM to identify children to participate in the program. Now they hope to attract the private sector to adopt one child at a time through a collective giving campaign.

“At the Farm, we spend our time growing trees from seeds,” said Terry. “The most critical time in that growth cycle is when we are nurturing the seedlings. There are unquestionable comparisons between seedlings and young children

– the greatest return on investments for both to succeed happens early on. It is our responsibility as a society to help them as much as we can to grow and to thrive. Creating the BEST Program Fund at VCF moves us one step closer to achieving this goal.”

## Francis “Frank” M. Skoronski Memorial Fund



Frank Skoronski and his wife Helene were born and raised in the Valley, attended Valley schools, were high school sweethearts at Derby High School, and lived in Shelton for 49 years. Frank graduated from Indiana University where he also served in the Army Reserves. While fulfilling his Army commitment where he eventually attained the rank of captain, he also completed his Masters Degree from Southern Connecticut State University and 6th year certificate in Education Administration from the University of Bridgeport.

Frank began his 37 year career in education as a teacher in Shelton and was quickly named principal of Sunnyside and later Booth Hill elementary schools. A dedicated and passionate educator, he took great pride in his work and his students' and staff accomplishments. He was a talented athlete and volunteered in various community organizations including the Boy Scouts Troop 3 Derby, the Boys and Girls Club, and the Valley United Way to name just a few. Shortly after his passing in 2013, his family chose to honor him by creating the Francis “Frank” M. Skoronski Memorial Fund at the Valley Community Foundation.

“We thought this would be something he would have really liked,” said Helene. “The Valley is where our family and friends are, where we made our memories and where we worked and raised our nine children. So many people have commented about how Frank impacted their lives in many different ways. He always put others before himself. Establishing this Fund in Frank's name will continue his commitment to education by awarding an annual scholarship in his name to a deserving Shelton High School senior majoring in Elementary Education.”

In addition, the family hopes as the fund grows larger to support Frank and Helene's other charitable interests such as serving people with special needs. "We have found The Valley Community Foundation to be an impressive organization, filled with other donors, like our mother and father, who truly love their Valley community," said son Matthew Skoronski. "The investment arm of this organization helps to manage and maximize the funds available to donors to benefit the community. VCF allows people just like our parents, who have lived, worked, and raised their families in the Valley for decades continue to help the Valley they love now and in the future."

"We take great pride in being Frank Skoronski's family," said his children. "We are truly in awe of how many lives he touched. His gentle and kind influence was felt by lifelong friends, former students and teachers. Frank did all this with a great sense of humor and a quick wit; to know him was truly to love him. Our hope is that our beloved husband and father's legacy will live on through the fund as well as through our actions. Most of all, we hope to carry on the greatest gift he's given us- the love of life, family, friends and community."

## Jesse McCord Lewis Scholarship Fund



Nurturing. Healing. Love. Three prophetic words written on a board in a home in Newtown by a lovely six year old boy days before his life tragically ended in December 2012. Three prophetic words that now guide a scholarship committee at Shelton High School charged with selecting a recipient who will honor the life of Jesse McCord Lewis by carrying his message out into the world. The Jesse McCord Lewis Scholarship Fund at the Valley Community Foundation, a designated scholarship fund, will provide scholarship(s) to graduating

seniors at Shelton High School who best exhibit the spirit of compassion and love for their fellow students and their community.

Jesse's father, Neil Heslin, was a graduate of Shelton High School's class of 1981. "As we watched the Sandy Hook tragedy unfold around us, a group of Neil's former classmates and I felt strongly that we had to do something to show our support for Neil," said classmate Sarah Smith Adanti. "We created a committee to put together a fundraiser to help establish a scholarship in Jesse's memory. As a group, we chose June 30th as our date at Danny O's on the River Road in Shelton. The owner, Danny Oraziotti, was also a former classmate and offered his location and donated the food for the event." "June 30th, 2013 would have been Jesse's 7th birthday, said Neil. "When I learned what everyone was doing to help, I really wanted us to have it on that day; it was as if Jesse was guiding us and helping to plan his own birthday party. So many people came out to show their support – it was truly incredible." Sarah agreed. "It was really successful and we hope to continue it as an annual fundraiser each year to help grow this scholarship."

"Jesse was always larger than life," said Scarlett Lewis, Jesse's mom. "From the moment he came into the world at 11 lbs. he was so full of energy; as he grew he loved riding horses and playing with his toy soldiers – he was constantly on the go. When we learned what had happened at Jesse's school in Sandy Hook, I knew in my heart that he had faced this tragedy both honorably and bravely. He had already exhibited so many acts of bravery in his short life. So it was no surprise to me that he helped to guide his classmates to safety by telling them to run while the gunman reloaded, even though he himself eventually lost his life." Neil agreed. "Jesse's last words and actions on that horrible day saved 11 of his friends and classmates."

Establishing the Jesse McCord Lewis scholarship at the Valley Community Foundation was a solid fit for everyone involved. "So much happened in and around Newtown immediately following the tragedy," said Neil. "Because I'm a Shelton resident, Jesse spent time in town with me. Everyone knew him, and when we talked about it, we really wanted to do something at Shelton High School. Valley United Way President Jack Walsh as well as VCF Vice Chair Joe Pagliaro Jr. had very positive things to say about VCF – so it became the best option for us to keep Jesse's scholarship here in the Valley at the Foundation."

"Jesse might have fulfilled his purpose on earth," said Scarlett. "But his larger purpose of sending out this message of nurturing, healing, love, is far greater. Choosing loving thoughts over angry thoughts goes beyond what a typical 6 year old child might normally do. Jesse has shown us, through his unbelievable bravery, that we all have a choice. We can choose love – so that this will not happen again. And through this scholarship, Jesse's message of Nurturing, Healing, Love will continue to blossom and grow – now, and forever."

## Valley Pride Fund



In the Wizard of Oz, Dorothy utters those five unforgettable words, “There’s no place like home!” For four former Derby residents, truer words were never spoken – especially about their lives growing up together in the Valley. The Garofalo, Marcucio and Piccolo families were friends long before Elise, Brian, Scott and Brian were born.

So it is no wonder that these childhood friends have proudly continued to grow their friendship into adulthood. Of course there have been significant milestones along the way – sports and academic achievements, weddings, children and successful careers. The latest milestone they have shared together was turning the big 4-0 in 2013. Not only did they do the traditional celebratory “big bash” – but the four decided to give back to the place they fondly call home even after all this time – by creating the Valley Pride Fund at the Valley Community Foundation.

“My family has had a great experience with the VCF,” said Elise. “In 2007, my brother Marc, the former Mayor of Derby, created the Derby Sister City Fund at the Foundation, which celebrated the connection between Derby and its sister city in Puglianello, Italy. Then again in 2012, my family decided to honor my father’s legacy by creating the Mario Garofalo Family Fund to support youth activities for children from Derby and throughout the Valley to give them a chance to experience things they otherwise would not have the opportunity to do. I talked it over with everyone and we all agreed that what we really wanted was to celebrate our milestone by giving back to help Valley families by supporting education programs and/or providing scholarship support.”

Brian M., Scott M. and Brian P. agreed. “When Elise first suggested it, we were all on board. We’ve had such great times growing up in the Valley. From trips to Roseland Pizza, to hanging out at the Valley Cinema and McDonald’s every weekend to spending summer days on end on Selma Ave,

there is a closeness that is still there. Derby’s a very small town which made it easy to forge very close bonds with friends and families, and the Valley has always been and always will be important to us all,” said Brian M. “We’ve all moved around and experienced so many other people in our lives and you realize not everyone has that same special connection with home or the people they grew up with like we did. That’s when we truly appreciated what we had growing up in the Valley and what it still to this day means to us. By establishing this Fund at VCF we hope to continue the Valley tradition of helping others and do our part to help keep our childhood home the special place it will always be.”

## The Ritchie Fund for the Plumb Memorial Library



Marjorie Ritchie was a lifelong Shelton resident who truly valued education. She was especially committed to advancing the interests of Shelton’s Plumb Memorial Library, which she viewed as a valuable resource for individual growth and development. Upon her passing in 2002, Miss Ritchie left specific instructions in her will that a portion of her estate be left to the Plumb Memorial Library.

The intent of Miss Ritchie’s gift was to support the Library and the Shelton community. The terms allowed the

library to use the interest earned on the account where it was needed the most. After careful consideration and discussions, the Board reviewed its investment options for this Fund and chose to permanently establish the Fund at VCF.

“By becoming part of the larger fund investment pool at VCF, Miss Ritchie’s intent will be realized,” said Library Board Chair Barbara Glover. “We recognized the many advantages of establishing an endowment fund at VCF, and believe Miss Ritchie’s gift will continue to significantly influence people’s lives and learning.”





Miss Helen DuBrava, circa 1939

## *Helen DuBrava spent her entire life in Shelton.*

Cheryl Rich grew up in the apartment downstairs from Helen, and knew Helen all her life. Cheryl remembers Helen as a consistent church-goer, and an avid reader of romance novels. She lived a modest life: never really took a vacation, didn't date or socialize much and worked in customer service for 40 years at Better Package.

"I think she enjoyed working with people and helping to solve their problems," Cheryl says.

When Helen visited her attorney, Jamie Cohen, to revise her Last Will and Testament, Helen decided to leave money to the Valley Community Foundation "to give back to the Valley for all the good it gave to her" Cheryl says.

Her generous bequest also memorializes her sister Agnes and Agnes' unfilled dream of becoming a nurse. Helen's bequest to the Valley Community Foundation created the Agnes and Helen DuBrava Fund which will offer the Agnes DuBrava Scholarship for a Shelton High School student interested in pursuing a career in nursing.

Helen's bequest makes her a member of the Gates Society, a group of deeply caring people who have invested in a brighter philanthropic future for our region.

The Gates Society provides a way to thank and honor individuals during their lifetimes for gifts that will come through their estates. The donations may contribute to an existing fund or with a gift of \$10,000 or more, can establish a named fund. Gifts may be bequests through wills, charitable trusts, or annuities that pay income to the donor during his/her lifetime. Life insurance, retirement assets, or real estate are also accepted.



Donors have the sense of satisfaction that comes with making a commitment to the future of their community through a permanent endowment. Members will be listed in the Foundation's publications (unless donors prefer anonymity) and will be kept current on the Foundation's programs and activities.

Gates Society members inspire others to make a difference in their community. By contributing to the Valley Community Foundation, you will be contributing to the long-term well-being of the Valley today, tomorrow and forever.

The Gates Society is named to honor Ross and Frank Gates, brothers who created trusts in the family name back in the late 1930s and 40's. The brothers were the last generation of a very prominent Derby family. They were part of the rich Derby and Valley history of industrial leaders with strong community service.

The Community Foundation for Greater New Haven (TCF) was named beneficiary of the income of this very large trust. The documents gave broad directions for how their donation was to be used. They did express special consideration be given "to benefit residents of Derby and vicinity." Since Frank's death in 1954, TCF has been distributing the income from the Trust to benefit the residents of the Valley. In 2004, the Gates fund seeded the formation of the Valley Community Foundation (VCF) and now TCF undertakes its Valley philanthropy through VCF. Annually, VCF receives a substantial unrestricted appropriation from TCF to allocate and fulfill our mission to the Valley communities.

Members of the Gates Society include Jane Cohen, Helen DuBrava\*, Bob and Sheri Grier, Heidi Kaplan, and Dorothy Palazzi

*\*deceased*

2004



- First Organization Fund - Derby Public Library
- VCF Launched Endowment Challenge Program committing \$130,000 to match new gifts to build permanent endowments for local organizations. This increased visibility of VCF among the supporters of these organizations, and confirmed VCF as a partner, not competitor to Valley nonprofits
- Foundation's "brand" developed – For Good. For Ever. For the Valley
- Community Fund created by William and Judith Bassett so everyone could contribute a gift of any size to the community's endowment

- 15 New Funds created totaling \$971,137
- Oak Cliff Cemetery transfers investment of its \$3 million endowment to VCF
- Selma Yudkin establishes the Harold Yudkin Fund at VCF to ensure that his tradition of generosity and dedication to his community would continue for years to come



- 11 New Funds created and increased VCF assets to \$7 million
- Gates Society created; Bob and Sheri Grier, Helen DuBrava become members
- The Frey-Hershey Foundation converted its assets to establish a donor advised fund so the company's and family's commitment to the Valley would remain intact now and in the future

2008



2004

2005

2006

2007

2008

- VCF created; first Affiliation Agreement Signed with The Community Foundation for Greater New Haven
- Angela Powers hired as first president; Joseph Pagliaro Sr., Board Chair
- (2004-2005) Twenty-five named funds established totaling \$901,042 to honor loved one(s), make permanent a family's commitment to the Valley, and safeguard and grow an organization's endowment
- All founding Board members created and built funds from founding year of 2004



2005



2007

- 9 New Funds created totaling \$439,068 and increase VCF assets to \$5,566,314
- Jamie Cohen hired as new president
- VCF conducts first round of responsive grantmaking, budgeted \$150,000 for this purpose
- VCF awards a total of \$171,000, including \$21,000 from several Donor Advised Funds to Valley nonprofit agencies
- Neighborhood Small Grants Program awards nearly \$90K to 59 community groups

# 2009



- 14 New Funds established totaling \$233,175 and increase VCF assets to \$6,933,971
- \$130,000 distributed for responsive grantmaking
- VCF awards a total of \$136,143 to Valley nonprofit agencies, including \$36,143 from Donor Advised Funds
- Neighborhood Grants awards nearly \$25,000 to 58 community groups
- Derby Public Library Organization Fund becomes a Permanent Organization Endowment Fund

2009

# 2010



- 13 New Funds totaling \$429,484 increase VCF assets to \$7,800,884
- New Affiliation Agreement with TCF signed; celebration held at Gilder Boat House

2010

- 12 new funds established, totaling \$5.22 million, including single largest gift in VCF history; VCF now has a total of \$13.2 million in assets\* \*In 8 years, opened more than 100 funds and distributed over \$2.6 million to worthy Valley organizations
- Distributed \$1.12 million in Valley specific grantmaking
- Established a joint annual responsive grant process with TCF; VCF now has primary responsibility to award all Valley-specific grants. \$400K distributed through responsive grants program
- Creates Revolving Response Grant process to address emergency or other programmatic requests \$5K and under; distributed over \$50K in first year of program.

2011



- New office opened
- Neighborhood Small Grants awards \$48,500 to 41 community groups

# 2012



- 8 new funds totaling \$268,930 created
- VCF participates in first greatGive; 300 gifts made supporting 60 nonprofits in the region

2012

# 2012



- 7 new funds totaling \$561,470 created
- Sharon Closius hired as President
- Nearly \$50K awarded to 28 community groups through Community Grants Process
- 18 responsive grants awarded totaling \$413,125

2013



- 21 Community grants awarded totaling \$44,331
- VCF now has 110 funds; over \$15 million in assets
- VCF awards \$308,832 in revolving response and responsive grants
- Community comes together to support Veterans Memorial Restoration efforts
- Valley Independent Sentinel awarded multiyear general operating support grant of \$150,000

# 2013

Celebrating 10 years!



# Funds of the Valley Community Foundation

## 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.

John and Paraskeve Vartelas 'AGAPE' Fund  
Bassett Family Fund  
Monty Blakeman Fund  
Cohen-DeToro Charitable Fund  
Jane C. and David B. Cohen 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  
Derby - Puglianello Sister City Fund  
Francis Family Fund  
Frey-Hershey Foundation Fund  
Louis "Neni" Gaetano, Sr. DHS Scholarship Fund  
Mario Garofalo Family Fund  
Raymond Gildea Memorial Fund  
David M. & Gail A. Grant Family Fund  
Guarrera Family Fund  
Tyler, Brian and Zachary Haywood Fund  
Jones Family Farms Fund  
Kaplan Family Fund  
Paul & 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. & Kenneth E. Schaible  
Donor Advised 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  
Gaeton and Elizabeth Simonetti Family Fund  
Sterling Opera House Endowment Fund  
Carla & Sean Sullivan Charitable Fund  
Sally & Dominick Thomas Fund  
John Tyma Fund  
Nancy Valentine Fund  
Valley Bar Association Memorial  
and Commemorative Fund  
Valley Pride Fund \*  
Alphonso and Eulalia Vitello Family Fund  
Warichar Family Fund

## 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.

Edward J. & Marie M. Cecarelli Book Fund  
Cohen Family Book Fund  
Edward J. Cotter Jr. Memorial Fund  
Derby Public Library - Harold B. Yudkin  
Historic Preservation Fund  
Health Initiative for Men (HiM) Fund  
Jones Family Farms Fund for the Connecticut  
Agricultural Experiment Station  
Bernice Nicolari/Howard Gura Award Fund  
Dorothy E. & Kenneth E. Schaible Fund for the  
Boys & Girls Club of the Lower Naugatuck Valley  
Francis "Frank" M. Skoronski Memorial Fund \*  
Donald W. & Lillian C. Smith Family Fund  
Peter J. Vartelas Invest In Youth Fund #2 for the  
Valley YMCA  
Colonel Lloyd E. and Joan Platt Witmer Fund

## Organization 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 income for the nonprofit.

Anonymous  
Birmingham Foundation Fund  
Herbert M. Clark Fund  
Derby Community Endowment Fund  
Derby Public Library Endowment Fund  
Housatonic Council, Boy Scouts of America  
Endowment Fund  
Housatonic Council, Boy Scouts of America Fund  
Oak Cliff Cemetery Association Fund

# Funds of the Valley Community Foundation

Parent Child Resource Center Endowment Fund  
Planetree Fund  
Recreation Camp Endowment Fund  
Ritchie Fund for Plumb Memorial Library \*  
Seymour-Oxford Rotary Club Fund  
Seymour Pink Endowment Fund  
Town of Seymour Endowment Fund  
TEAM, Inc. Endowment Fund  
TEAM Reserve Fund \*  
Troop 3 - Derby BSA Alumni & 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  
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.

Michael J. Adanti Memorial Community Fund  
Joseph 'Jay' Amico Artistic Memorial Awards Fund  
Ansonia Public Schools Scholarship Endowment Fund  
Ansonia Rotary Club Scholarship Endowment Fund  
Bruno Battaglini Memorial Fund  
Lou and Dolly DeFilippo Scholarship Fund  
Honorable Joseph P. Flynn and Family Scholarship Fund  
Geissler Family Scholarship Fund  
Traci L. Haines Memorial Scholarship Fund  
Arthur Hayes Jr. Memorial Scholarship Fund  
Patricia M. Kondrath Scholarship Fund  
Frank J. Lang Fund

Jesse McCord Lewis Memorial Scholarship Fund \*  
Ann O'Neil Memorial For Integrity Award  
Joseph E. Potter Memorial Fund  
George and Beatrice Ryan Scholarship Fund  
Maureen, Megan and Katey Ryan Fund  
John Sabulis Memorial Scholarship Fund  
Norman K. and Janet N. Santa Fund  
Julian A. Taylor Fund  
George Vartelas Ansonia High School Scholarship Fund  
Peter Vartelas Ansonia High School Scholarship Fund  
Joseph and Pauline Warichar Memorial Fund

## 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 in perpetuity to nonprofits that serve the donor's field of interest.

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.

Cohen Community Fund  
Holy Trinity Greek Orthodox Church of Ansonia Fund  
Dorothy E. & Kenneth E. Schaible Community Fund  
Valley Community Fund

*\*New fund in 2013*

# Financials/Investments

Stewardship of the Valley's charitable assets continue to generate positive net investment returns in excess of the market benchmarks.

The Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF) have been tightly connected through a solid financial partnership that has steadily evolved throughout the past 10 years. The assets entrusted to VCF have been managed in cooperation with TCF since VCF's inception in 2004. This relationship affords VCF the benefits of a diverse, long-term endowment model allocated across domestic and international segments of the market, which are accessed through the selection of more than 25 specialized investment managers retained by TCF.

The results of the overall endowment strategy, including each of the underlying investment managers, are independently assessed and reported on a monthly basis against appropriate market benchmarks. Skilled oversight and thoughtful management has continued to generate a positive net investment returns in excess of the benchmark not only in the short term but throughout the past 10 years.

VCF is pleased to report a 17.5% return, net of investment management expenses, against the market benchmark of 14.4% for the year ended December 31, 2013. We are equally proud that since the VCF inception, 10 years ago, the endowment has had an annualized return of 7.6%, net of investment management expenses, versus the market benchmark of 5.6%.



*"Our successful investment program is due to a strategic asset allocation framework designed by TCF and by participating in their commingled investment pool, VCF's funds are strongly positioned to meet the charitable needs today and in the future."*

**Bill Nimons**  
Treasurer  
Valley Community Foundation

## INVESTMENT PERFORMANCE

Annualized return, expressed as a %, net of investment management expense.

	Trailing 1 year	Trailing 3 years	Trailing 5 years	Trailing 7 Years	Trailing 10 years <sup>1</sup>
INVESTMENT POOL ACTUAL	17.5	10.0	13.3	5.7	7.6
MARKET BENCHMARK <sup>2</sup>	14.4	8.7	12.0	3.3	5.6
ACTUAL VS. BENCHMARK	3.1	1.3	1.3	2.4	2.0

<sup>1</sup> February 13, 2004, date of Affiliation Agreement with the Community Foundation for Greater New Haven.

<sup>2</sup> 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.



## SUMMARY OF FINANCIAL POSITION

	2013	2012
<b>Assets</b>		
Cash and Cash Equivalents	\$619,772	\$801,232
Investment at Market Value	16,993,375	14,324,077
Total Investments	17,613,147	15,125,309
Other Assets	3,635	1,000
<b>Total Assets</b>	<b>\$17,755,188</b>	<b>\$15,284,062</b>
<b>Liabilities and Net Assets</b>		
Accounts payable and accrued expenses	\$16,796	\$2,537
Organization funds	5,094,270	3,976,756
Grants payable	254,749	362,852
Total Liabilities	5,365,815	4,342,145
Unrestricted Net Assets	12,389,373	10,941,917
<b>Total Liabilities and Net assets</b>	<b>\$17,755,188</b>	<b>\$15,284,062</b>

## SUMMARY OF ACTIVITIES

	2013	2012
<b>Revenue</b>		
Contributions	\$1,832,370	\$1,909,808
Less Contributions to Organization Funds	(561,402)	(10,154)
Net Contributions	1,270,968	1,899,653
Realized and unrealized gain (loss) on investments	797,677	762,809
Investment income	1,026,284	479,319
<b>Total Revenue</b>	<b>\$3,094,929</b>	<b>\$3,141,782</b>
<b>Expense and Net Assets</b>		
Grants approved, net	\$1,375,388	\$1,083,370
Grants management expense and direct grant activities	262,329	254,466
Total grants expense	1,637,717	1,337,836
Less grants from organization funds	(165,130)	(162,435)
Net grant expense	1,472,587	1,175,401
Development, donor services and fund stewardship	109,303	106,027
Management and general	65,583	63,617
Total administration expense	174,886	169,644
<b>Total Expense</b>	<b>1,647,473</b>	<b>1,345,045</b>
Increase in Net Assets	1,447,456	1,796,736
Net Assets - Beginning of Year	10,941,917	9,145,181
<b>Net Assets - End of Year</b>	<b>\$12,389,373</b>	<b>\$10,941,917</b>

Financials

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 Thomas E. Skowronski  
 Eugene A. Skowronski Esq.  
 Walter E. Skowronski  
 Jere P. Smith  
 Dr. Maria A. Smith  
 Anthony & Diane Staffieri  
 Gregory J. Stamos  
 Paul Stamos  
 Frederick & Karen Stanek  
 Carol Starkey  
 Cheryl Staus  
 Patty Stonoha  
 Laurene B. Storable  
 Linda K. Storable  
 Paul Storable  
 Robert and Colleen Streb  
 Alan & Diana Supersano  
 Judy Szewczyk  
 TEAM, Inc.  
 Threecore Inc.  
 Janice D. Tiano  
 James P. Tickey  
 Mary Jane & George Tokash  
 Tomasella, Schlitter & Burrell, P.C.  
 Peter & Karen Tomlinson  
 Agapito & Jorge Torre  
 Troop 3 - Derby BSA Alumni & Friends Foundation, Inc.  
 Tom Troutman  
 Alan & Debra Tucker  
 Brian & Ann Turner

Francis & Paula Tyszka  
 Frances C. Uleano  
 Dana Urban  
 Robert & Alberta Vagnini  
 Nancy Valentine  
 Valley United Way  
 Samantha VanDeman  
 Allan J. Vartelas  
 Ted Vartelas, CLU  
 Tekla Vartelas  
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 Daniel R. Waleski  
 Robert & Joan Walsh  
 Timothy Walsh III & Gail Walsh  
 Marc Weissman  
 Tom & Jodi Welch  
 Cheryl Wert & Bryan Wert, Jr  
 White Home Products, Inc.  
 Brian Wilcox  
 Catherine Williams  
 Joan & Kenneth Williams  
 Lorraine Williams  
 Patricia A. Wilson  
 Lynn Yeh & Family  
 Kathleen & Norman Yolish  
 Thaddeus J. Zamor  
 Laura & John Zaprzalka  
 Kenneth & Patricia Ziman  
 Salvatore & Jennifer Zinzi  
 Freshta Ziyade  
 Rich Zoeller  
 Robert G. Zuraw

\* In addition, we thank the donors who made 708 gifts to our local nonprofits through the Great Give 2013.



# Community Investments – Grants

## 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.

**Ansonia Public Schools** - To support the Ansonia Charger Club's after school program for children in Grades 6-8. ~ \$25,000

**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 provide general operating support for comprehensive behavioral health, prevention and domestic violence services to Lower Naugatuck Valley, Greater New Haven and Shoreline residents. ~ \$52,000 \*\*

**Catholic Charities Archdiocese of Hartford** - To support the Outpatient Psychiatric Clinic for Children, a program of the Family Service Center in Ansonia. ~ \$60,000 \*

**Christ Episcopal Church** - To support the Kathleen C. B. Samela Memorial Food Bank. ~ \$10,000

**CT Brownfields Land Bank** - To support the establishment and development of CT Brownfields Land Bank to serve the Naugatuck Valley region. The Valley Council of Governments is acting as the fiscal sponsor. ~ \$46,500 \*

**Griffin Hospital** - To support state-of-the-art technology enhancements to the current Interventional Radiology Suite. ~ \$200,000 \*

**Griffin Hospital** - To support the Community Outreach and Valley Parish Nurses' programs. ~ \$15,000

**Healthy Eyes Alliance** - To support the Healthy Eyes for Connecticut Kids Project which provides free vision screening, referral and follow up services for preschool children from low-income communities in Ansonia, Derby, Milford, New Haven, Seymour, and Shelton. ~ \$20,400 \*\*

**Lower Naugatuck Valley Parent Child Resource Center Inc.** - To support the hiring of a Business Integration Consultant to develop a plan to combine business and service data to improve performance, increase capacity, improve outcomes and strengthen overall sustainability. ~ \$45,000 \*

**Massaro Community Farm, Inc.** - To support educational programming focusing on locally grown food and sustainable living strategies. ~ \$7,425

**Naugatuck Valley Health District** - To support the development of a Maternal Health Coalition to address issues related to the access and availability of women's reproductive health services within the municipalities of Ansonia, Derby, Seymour and Shelton. ~ \$33,000

**Salvation Army, Greater Valley Corps** - To provide general operating support for comprehensive emergency assistance in the forms of food, clothing, utilities and furniture vouchers. ~ \$30,000

**TEAM, Inc.** - To support a Valley Diaper Bank Initiative that will provide diapers, wipes, and information & referral services to Valley families in need. ~ \$45,000 \*

**Valley Emergency Medical Services** - To support the purchase of cardiac monitoring equipment. ~ \$40,000 \*

**Valley YMCA** - To provide general operating support for programming that builds healthy spirit, mind, and body for Valley residents. ~ \$75,000 \*

**Women's Business Development Council** - To provide general operating support for educational and counseling programming to help women start and grow businesses and achieve economic self reliance. ~ \$10,000 \*

\*Multi-year grant awards

\*\* A multi-year Partnership Grant with The Community Foundation for Greater New Haven

## Revolving Response

In 2013, VCF made grants from \$250 to \$5,000 which contribute to and support nonprofits and organizations serving the Valley community. The Revolving Response Grants process is designed to promptly address the needs of our nonprofits through a simplified application process.

**American Legion, Sutter-Terlizzi Post 16** - To support one boy and one girl from each of the five Valley Communities to attend the Boys State and Girls State Program. ~ \$5,000

**American Red Cross, Connecticut Chapter** - To support The Lower Naugatuck Valley Regional Shelter Trailer located on or near the site of the Lower Naugatuck Valley Regional Shelter at Ansonia High School in Ansonia. This grant was made in partnership with 3 donor advised funds. ~ \$12,275

**Boy Scout Troop 3 Derby** - To support the publishing of a book in celebration of the 100th anniversary of Troop 3 and to honor the life of Ed Strang, former scoutmaster and community leader. ~ \$1,450

**Boys & Girls Club of the Lower Naugatuck Valley** - To support the installation of HVAC Units at the Smilow Clubhouse. ~ \$5,000

# Community Investments – Grants

**Christ Episcopal Church** - To support administrative and operating costs to maintain and operate the Kathleen C.B. Samela Food Bank. ~ **\$4,000**

**City of Derby** - To support the costs of weight, endurance, strength and balance training into a healthy exercise program for members of the Derby Senior Center. ~ **\$3,500**

**Connecticut Radio Information System** - To support an electronic radio reading service for sight and print impaired Valley residents. ~ **\$4,600**

**Emil Singer Post 10 American Legion** - To support the reconstruction of the fire exit staircase at the Post. ~ **\$3,800**

**International Institute of Connecticut** - To support Project Rescue, a program to combat human trafficking in the Valley. ~ **\$2,150**

**Jane Doe No More** - To support the costs of three "Escape Alive" self-defense classes for women of all ages in the Valley. ~ **\$2,970**

**Long Hill Burial Ground** - To support restoration efforts including resetting damaged grave stones, repairing the stone wall and restoring neglected family sites. ~ **\$500**

**Master's Table Community Meals** - To support the creation and the roll-out of a web site. ~ **\$2,031**

**Moving With HOPE (Health Oriented Physical Education, Inc.)** - To support program fees for 10 Valley youth and their families to participate in an indoor exercise summer program at Willie's Indoor Sports Field. ~ **\$833**

**Oxford Historical Society** - To support the installation of period-appropriate windows at the Twitchell-Rowland Homestead. ~ **\$3,000**

**Oxford Land Trust** - To support improvement to the entry loop trail of the Rockhill House Sanctuary outdoor recreation park in Oxford. ~ **\$4,500**

**Seymour Historical Society** - To support an educational speaker series for 2013. ~ **\$2,796**

**Seymour Fire Department** - To support an upgrade of all department gas detection equipment including the necessary equipment to calibrate and maintain the meters. ~ **\$4,000**

**Shelton Historical Society** - To support the cataloging and preservation of over 1,000 photographic images from the Civil War era up to the year 2013. ~ **\$2,500**

**St. Joseph Senior Youth Group** - To support the collaboration of two high school age youth groups to design and maintain a comprehensive youth ministry program. ~ **\$2,000**

**Susanna Wesley School** - To support the creation of an Outdoor Classroom. ~ **\$1,000**

**Valley Emergency Medical Services** - To support the purchase of four video laryngoscopes for use in field intubation procedures. ~ **\$4,110**

**Valley Shakespeare Festival (VSF)** - To support VSF's inaugural production of The Comedy of Errors at the Veterans Memorial Park ~ **\$5,000**

**Wesley Heights** - To support the daily living activities of indigent residents of the Middle Court Apartments at Wesley Heights. ~ **\$5,000**

**Workforce Alliance** - To support the WorkPath Fund which assists Valley parents with dependent children to obtain, retain, or maintain employment. ~ **\$5,000**

## Sponsorship Grants

Nonprofit organizations can apply for support from VCF for special events, especially those events that inform the community of a particular issue.

**Ansonia High School** - To sponsor a Parent Connection Breakfast celebrating community service projects. ~ **\$750**

**Ansonia Public Schools** - To sponsor a celebration of the inaugural issue of The Charger Pride newspaper at Ansonia High School. ~ **\$650**

## The Naugatuck Valley Health District

*received a grant of \$33,000 to create the Maternal Health Coalition which will address health services for women of childbearing age in the Valley.*

*"We know women are waiting longer and longer to obtain prenatal services, and as a result they're not getting the care they really need," says Karen Spargo, Director of Health for the Naugatuck Valley Health District. "We want to understand what the barriers are and why this is happening. This funding will allow us to bring together a coalition, do an assessment and see where the gaps are."*

**Ansonia School Readiness** - To support the 7th Annual Literacy Fair at the Ansonia Middle School. ~ **\$2,500**

**Area Congregations Together (Spooner House)** - To sponsor the 16th Annual Walk on the Derby Greenway for the Hungry and Homeless. ~ **\$1,500**

**Assumption Church** - To sponsor the Sundays at Five musical series. ~ **\$500**

**BHcare** - To sponsor the 25th Annual Bowl-2-Benefit the Center for Domestic Violence. ~ **\$1,000**

To sponsor the Greater Valley Substance Abuse Action Council's workshop entitled: Medical Marijuana -- How it will affect your workplace and community? ~ **\$1,000**

To sponsor the Annual Holiday Gala. ~ **\$1,000**

# Community Investments – Grants

**Boys and Girls Club of the Lower Naugatuck Valley** - To sponsor the 12th annual Commodore Hull Thanksgiving Day 5K Road Race. ~ \$2,500

**Center Stage** - To sponsor the performance of the Drowsy Chaperone, celebrating the 30th Anniversary of the Youth CONNecTion theatre group. ~ \$300

**Derby Community Endowment Fund** - To sponsor the 2nd Annual Spring Fundraiser. ~ \$750

**The Connecticut Brownfield Land Bank, Inc.**  
*received a grant of \$46,500 to be used over three years to create a land bank dedicated to remediating and redeveloping brownfields throughout the Valley. Brownfields are contaminated properties, most frequently due to previous industrial uses of these sites. Once cleaned up, they may be redeveloped for future use.*

*"We expect to produce important and lasting social and economic returns and look forward to fulfilling the promise of cleaned up brownfield sites for the people in our region," said Arthur Bogen, President of the Connecticut Brownfield Land Bank, Inc.*

**Derby High School** - To support the Post Prom event. ~ \$750

**Derby Historical Society** - To sponsor the Derby Historical Society's Annual Silver Tea at John J. Sullivan's. ~ \$250

To sponsor the Annual Meeting. ~ \$750

**Griffin Hospital** - To sponsor the 2013 Griffin Gala at the Shubert Theater. ~ \$1,000

To sponsor the 28th Annual "Bowl for Kids" Bowl-A-Thon. ~ \$1,000

To sponsor the fourth annual JA High School Business Challenge. ~ \$1,000

**Housatonic Council, Boy Scouts of America** - Sponsorship of the Nineteenth Annual Valley "Good Scout" Award ceremony. ~ \$500

**International Institute of Connecticut** - To sponsor the 16th Annual Naturalization Ceremony. ~ \$1,000

**Junior Achievement of Western CT** - To sponsor the JA Titan Business program which prepares Ansonia, Derby, Seymour and Shelton high school students to compete in the 2013 Junior Achievement Business Challenge held at Fairfield University. ~ \$1,000

**Literacy Volunteers of Greater New Haven** - To sponsor the Scrabble Challenge. ~ \$500

**LNV Parent Child Resource Center Inc.** - To sponsor the Second Annual Pedal for PCRC. ~ \$1,000

To sponsor the Annual Awards Celebration. ~ \$500

To sponsor Fore! The Children's Golf Tournament. ~ \$500

**Moving With HOPE (Health Oriented Physical Education, Inc.)** - To sponsor the Fourth Annual Shelton Wheel-Walk To Work at the Riverwalk in Veterans Memorial Park, Shelton. ~ \$500

**New Haven Rowing Club** - To sponsor the Head of the Housatonic Regatta. ~ \$500

**New Haven Symphony Orchestra** - To sponsor the Valentine Cabaret Dinner. ~ \$500

To sponsor the 2013-2014 Shelton Family Concert Series: Peter and the Wolf, Tales and Tunes, and Simply Strings at Shelton Intermediate School. ~ \$1,500

**Oxford Freedom Run Committee** - To support the Oxford Freedom 5K Run/Walk and the children's Rock Hopper Fun Run. ~ \$2,000

**Oxford High School** - To sponsor Rachel's Challenge, an all day anti-bullying event that trains students to become leaders in promoting a safe and welcoming school climate. ~ \$2,000

**Rape Crisis Center of Milford, Inc.** - To sponsor the 10th Annual Indoor Golf Classic. ~ \$1,000

**Salvation Army, Ansonia** - To sponsor the First Annual Recognition Breakfast. ~ \$500

**Seymour Ambulance Association** - To sponsor EMS week which included a variety of educational sessions for the Valley community. ~ \$1,000

To sponsor a training in situational awareness that focused on emergency response plans, policies, and procedures as they pertain to a mass casualty incident. ~ \$1,000

**Seymour Christmas Parade** - To sponsor the Seymour Christmas Parade in downtown Seymour. ~ \$1,000

**Seymour Founders' Day Association** - To sponsor the 4th Annual Seymour Founders' Day in downtown Seymour. ~ \$1,000

**Seymour Public Schools** - To sponsor "Teen Distracted Driving Week." ~ \$1,000

To sponsor the Take a Stand program at Seymour High School. ~ \$500

**Shelton High School** - To support the Post Prom event. ~ \$750



# Community Investments – Grants

**Shelton High School Robotics Team** - To sponsor a CT FIRST Lego League Robotics Qualifying Tournament Competition at Shelton High School. ~ \$1,000

**Special Olympics of Connecticut** - To sponsor the 2013 Special Olympics Connecticut Developmental Aquatics Meet at Oxford High School. ~ \$1,000

**St. Joseph High School** - To sponsor St. Joseph's Hall of Fame event. ~ \$500

**St. Mary St. Michael School** - To sponsor a Duck Race on the Housatonic River on the Derby-Shelton Bridge. ~ \$250

To sponsor the Alumni Recognition Dinner. ~ \$500

To sponsor the production of Stone Soup and other short plays. ~ \$500

**TEAM, Inc.** - To sponsor the 6th Annual Men Who Cook fundraiser. ~ \$1,000

To sponsor the 9th Annual Christmas Breakfast for Valley TEAM toys 4 Kids. ~ \$1,000

**The Mary A. Schmecker Turtle Shell Fund** - To sponsor the Soupstock Music & Arts Festival. ~ \$250

To sponsor In Love and Chocolate. ~ \$250

**Valley Council for Health and Human Services** - To sponsor the Annual Meeting and Community Awards Presentation. ~ \$1,000

**Valley Early Childhood Task Force** - To sponsor the 4th Read Across the Valley event. ~ \$1,500

**Valley United Way** - To sponsor Harvest House V which collects food items to be distributed to area food banks. ~ \$500

## Recognition Grants

The VCF Board of Directors recognizes the contributions of outstanding individuals and organizations who 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.

**Mary Lou Cook Award - PCRC David Morgan** – Grant to the TEAM Endowment Fund at the Valley Community Foundation

**Charles H. Flynn Award Valley United Way Ernestine and Nicholas Luise** - Grant to BHcare, Center for Domestic Violence Services

**Gold Seal Awards Valley Chamber of Commerce John Betkoski (Gold)** - Grant to Griffin Hospital Development Fund

**Linda Holmes-Hannon (Gold)** - Grant split between BHcare, Domestic Violence Services and the Boys & Girls Club of the Lower Naugatuck Valley

**Naugatuck Valley Greenway Project Committee (Silver)** - Grant to the Housatonic Valley Association to support the Naugatuck River website

**Fred Ortolí (Platinum)** - Grant to the Valley United Way

**Carol Pendagast (Gold)** - Grant split between BHcare and TEAM, Inc.

**Good Scout Award - Housatonic Boy Scout Council Law Firm of Welch, Teodosio, Stanek & Blake LLC.** - Grant to the Housatonic Council, Boy Scouts of America

**Dr. John I. Howe Award - Derby Historical Society David Grant** - Grant to the Derby Historical Society

**Joseph Pagliaro, Sr. Award - PCRC Geraint Phillips** - Grant to the Lower Naugatuck Valley Parent Child Resource Center

**Women Making a Difference - Valley Women's Health Initiative Susan DeLeon** - Grant to the Boys & Girls Club of the Lower Naugatuck Valley

**Linda Gorel** - Grant to the Visiting Nurse Association of South Central Connecticut to support Valley programming

**Joan McTaggart** - Grant split between BHcare and TEAM, Inc.

**Barbara O'Neil** - Grant to Area Congregations Together, Inc.

**Michelle Pagliaro-Haywood** - Grant to the BEST Fund at the Valley Community Foundation

**Donna Skurat** - Grant to the Boys & Girls Club of the Lower Naugatuck Valley

## For Their Service

**William Bassett** - in honor of his years of service to the Valley Community Foundation as a founding Board Member. Grant to the Valley Community Fund at the Valley Community Foundation

**Jamie Cohen** - in honor of his years of service to the Valley Community Foundation as a volunteer, Board Member and President and CEO. Grant to the Cohen Family Book Fund at the Valley Community Foundation.

**Marilyn Cormack** - in honor of her retirement after 30 years of service to BHcare. Grant to BHcare, Center for Domestic Violence Services.

**John Corrado** - for his dedication in assisting Valley Nonprofits with The Great Give 2013. Grant split between the Ansonia School Readiness Council, the Boys & Girls Club of the Lower Naugatuck Valley and the Shelton Historical Society, Inc.

# Community Investments – Grants

**Thomas Lenart, Jr.** - in honor of his service to the City of Derby as the 4th generation of the Cotter family to be chosen as Derby's Fire Chief. Grant to the Edward J Cotter Jr. Memorial Fund at the Valley Community Foundation.

**Donna Lindgren** - in honor of her retirement as the Director of the Ansonia Nature and Recreation Center after 34 years of dedicated service to the environment and community. Grant to the Ansonia Nature and Recreation Center to support FANCI Scholarships.

**Aleta Miner** - for her work as a Corporator for The Great Give 2013, Grant to the Sunshine Golden Retriever Rescue Corp. to support Valley programming.

**Laura Mutrie** - in honor of her 15 years of service to the Lower Naugatuck Valley Parent Child Resource Center. Grant to the Lower Naugatuck Valley Parent Child Resource Center Endowment Fund at the Valley Community Foundation.

**Bill Powanda** - in honor of his retirement after years of service to Griffin Hospital and the Valley. Grant to Griffin Hospital/Valley Breast Health Care Fund.

**Alan Tyma** - in honor of his years of service to the Valley Community Foundation as a founding Board Member. Grant split between BHcare,

Center for Domestic Violence Services' Men Who Give program and Massaro Community Farm.

**Msgr. Robert Weiss** - in honor of his service to the Newtown community. Grant to United Way of Northwest Connecticut.

## Donor Advised Grants

Grants from Donor Advised Funds are made by the VCF Board upon the request and with the participation of the Donor. The following is a list of organizations supported through Donor Advised Funds

American Red Cross,  
Connecticut Chapter  
Ansonia Public Schools  
Ansonia Rescue Medical Services  
Area Congregations Together, Inc.-  
Spooners House  
BHcare  
Birthright of Greater New Haven  
Boy Scout Troop 3 Derby  
Boys & Girls Club of the  
Lower Naugatuck Valley  
Bunnell High School  
Catholic Family Services of Ansonia  
Center Stage Theatre, Inc.  
Church of the Good Shepherd  
Clark Memorial Library  
Connecticut Forest & Park Association  
Connecticut Hospice, Inc.  
Derby High School  
Derby Historical Society  
Derby Neck Library  
Derby Public Library  
The Foundation School  
Friends of the Ansonia Nature Center

Girl Scouts of Connecticut  
Greater Valley Chamber of Commerce  
Griffin Hospital  
Griffin Hospital/Valley Breast  
Health Care Fund  
Housatonic Council,  
Boy Scouts of America  
Junior Achievement of  
Western Connecticut, Inc.  
Long Hill Burial Ground Ltd.  
Lower Naugatuck Valley  
Parent Child Resource Center Inc.  
Mishkan Israel Day Camp  
National Right to Work Legal Defense  
and Education Foundation, Inc.  
Oxford Land Trust, Inc.  
Perry Hill School  
Recreation Camp Inc.  
Ronald McDonald House  
Salvation Army, Greater Valley Corps  
Seymour Public Schools  
Shelton Economic  
Development Corporation  
Shelton High School  
Shelton High School Robotics Team  
Shelton Historical Society  
Shelton Land Conservation Trust  
St. Martin de Porres Academy  
Susanna Wesley School  
TEAM, Inc.  
University of New Hampshire  
University of New Haven  
Valley United Way  
Valley YMCA  
VARCA  
Visiting Nurse Association of  
South Central Connecticut  
Women's Business  
Development Council  
Working Lands Alliance  
Yale-New Haven Hospital

## 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  
Ansonia High School  
Ansonia Public Schools  
Assumption School  
Boys & Girls Club of the  
Lower Naugatuck Valley  
Culinary Institute of America  
Derby High School  
Emmett O'Brien  
Regional Technical School  
Hamden High School  
Johnson and Wales University  
Oxford High School  
Sacred Heart Academy  
Seymour High School  
St. Joseph Parish  
West Haven High School

# Community Investments – Grants

## Designated Grants and Organization Fund Transfers

Designated funds are established by a donor or donors to benefit a specific organization or organizations and help secure sustainability. In addition, VCF holds the endowment and reserve funds of several local nonprofit organizations. The following is a list of organizations that received a grant in 2013 from a designated fund or as a distribution from their reserve Fund

### Anonymous

Ansonia Public Schools  
Boys & Girls Club of the  
Lower Naugatuck Valley  
Central Connecticut Coast YMCA  
Derby Public Library  
Greater Valley Chamber of Commerce  
Griffin Hospital  
Housatonic Council,  
Boy Scouts of America  
Lower Naugatuck Valley Parent Child  
Resource Center Inc.  
Oak Cliff Cemetery Association  
Planetree, a Subsidiary of Griffin  
Health Services, Inc.  
Seymour-Oxford Rotary Club  
Seymour Pink, Inc.  
Town of Seymour  
Shelton High School  
TEAM, Inc.  
Trinity Cemetery Association  
Trinity Episcopal Church  
Valley YMCA

## Unrestricted/ Preference Funds

Unrestricted and Preference funds allow the VCF Board of Directors to address a pressing need of an organization or community. The following is a list of organizations that received a grant in 2013 from an unrestricted or preference fund.

### Area Congregations Together –

Spooner House  
City of Derby  
Derby Public Library  
Griffin Hospital  
Housatonic Council,  
Boy Scouts of America  
Jewish Federation of Greater  
New Haven  
TEAM, Inc.  
Valley Emergency Medical Services  
Valley Shakespeare Festival  
Valley YMCA



### TEAM's Diaper Bank

*is based on a national model started in New Haven. VCF's \$45,000 grant to TEAM (to be awarded over three years) will help establish a Valley Diaper Bank to provide diapers as well as other referral services to help recipients become more self-sufficient.*

*"Low-income families are struggling to make their next rent payment and they're forced to cut corners," says TEAM Inc. President & CEO Richard Knoll. "Since diapers are incredibly expensive sometimes that means using a diaper longer than you should, and it becomes a health issue for the child."*



# Board and Staff



Beth Colette, Administrative Assistant  
Valerie Knight-Di Gangi, Program Officer  
Betsy Yagla, Communications Consultant  
Sharon Closius, VCF President & CEO



Drew Alden, Chief Financial Officer

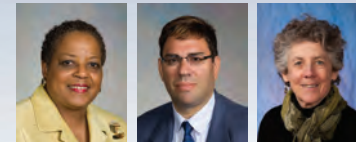


John Corraro, VCF Intern



Standing left to right: Timothy Dillon, Rick Dunne, Leon Sylvester, Jim Ryan, Bill Nimons, Alan Tyma ~ Seated left to right: Karen Stanek, Will Ginsberg, TCF President & CEO, Sharon Closius, VCF President & CEO, John Zaprzalka VCF Board Chair, Susan Coyle, Lynne Bassett-Perry

Pictured Below: Diane Stroman, Joseph Pagliaro, Liz Kennard



***VCF wishes to thank the following individuals for  
their time and contributions:***

## **COMMUNITY GRANTS COMMITTEE MEMBERS**

Liz Kennard - Chair, Pablo Barriga, Beth Carson, Joy Demarchis, Barbara Hayes, Aleta Miner, Rachel Nichols, Ray Oppel, Paul Roy, Leon Sylvester, Jack Walsh

## **RESPONSIVE GRANTS COMMUNITY REVIEWERS**

Linda Adanti, Rich Bshara, Kate Cosgrove, Jan Daddona, Ed Kisluk, Ruth Parkins, Jane Snaider, Jimmy Tickey, Paul Vivian

**THE STAFF AT THE COMMUNITY FOUNDATION for GREATER NEW HAVEN.**

# How to Set up a Fund

When you give through the Valley Community Foundation your gift—and your legacy—lasts forever.

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 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. You may contribute, at any amount, to an already existing fund or open your own.

In just a few short steps, 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 the fund. This will be your legacy: One hundred years from now, your fund will still be making gifts. Or, you may set up the fund anonymously if you prefer.

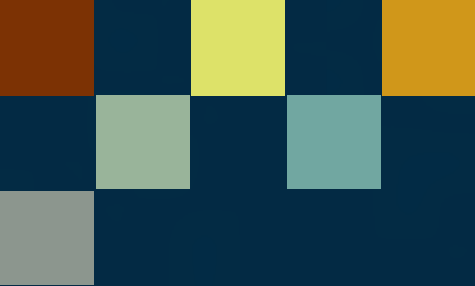
## Step 3:

Call the office and we will work together to prepare the fund agreement that fits your philanthropic goals.

**All donations to the Valley Community Foundation are tax-deductible. We look forward to connecting with you.**







VALLEY COMMUNITY FOUNDATION  
253-A Elizabeth Street, Derby, CT 06418  
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