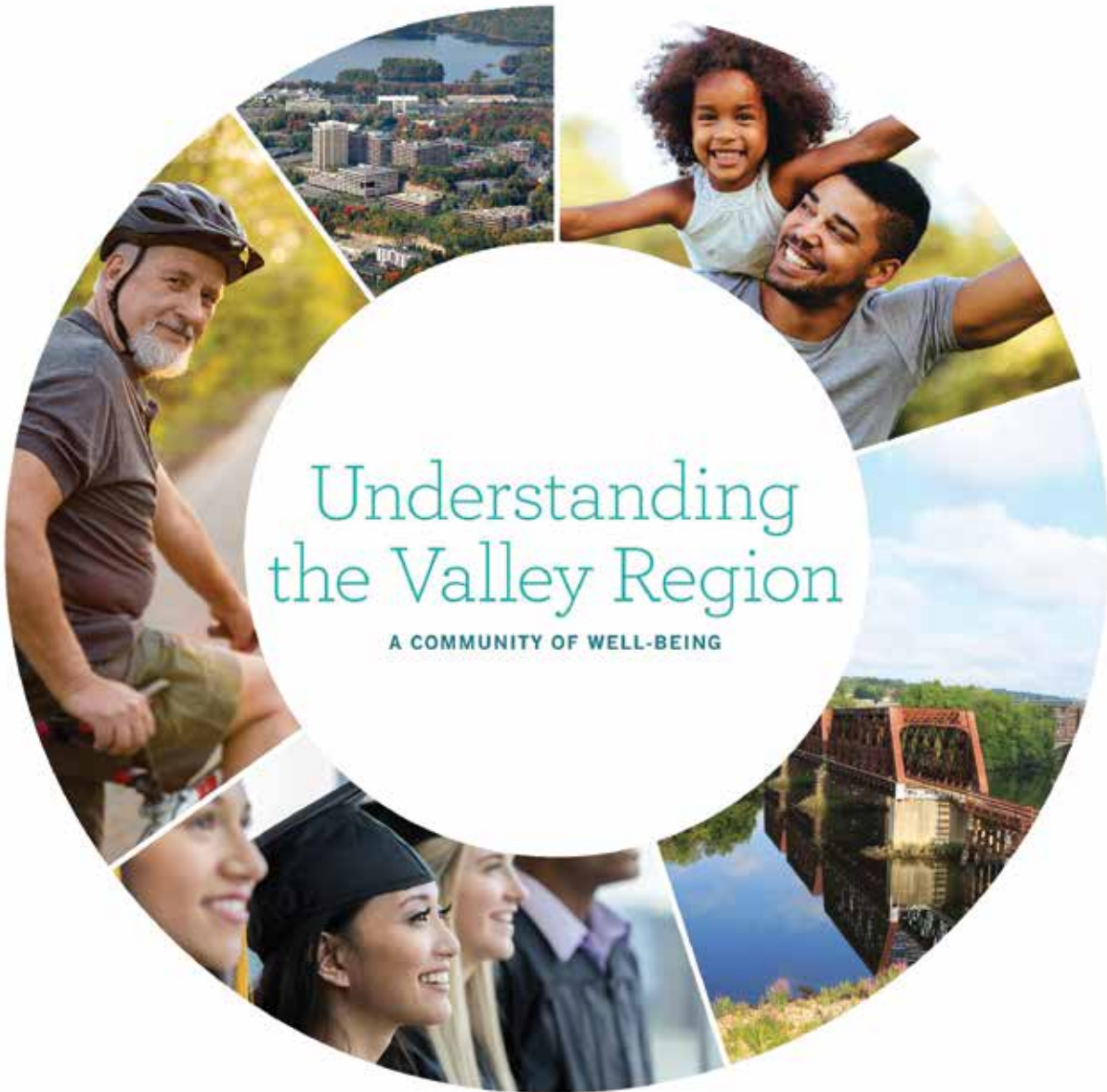


Legacy *Matters*



Understanding the Valley Region

A COMMUNITY OF WELL-BEING

in this issue: Fall 2019

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Smart Investment

Using Data to Create Community Impact



Many factors support personal well-being and happiness, but scientists have identified some of the most important, including: community life and social support, health outcomes, and employment and basic needs.



The 2019 Valley Community Index, pictured on the cover of this newsletter, and the Spotlight executive summary, pictured above, are both available on www.valleyfoundation.org.



More than 90 community members attended the event at the R.D. Scinto Auditorium to learn about data released in the 2019 Valley Community Index.

The 2019 Valley Community Index is a single-source data document that examines the Valley community across a variety of different sectors: community life, health and well-being, education, economics, and transportation. These factors are part of people's daily lives and the Index helps organizations like the Valley Community Foundation (VCF) to examine how the factors intersect from different data points. The information describes not just individuals or families but the community as a whole.

In 2014, Valley leaders recognized the need for reliable and accessible data in one report instead of being spread throughout multiple sources. The first step toward creating a comprehensive data view was the 2015 Valley Snapshot, an 8-page, high-level indicators report. It formed the basis of the first Community Index in 2016, created in partnership with DataHaven, a nonprofit organization with a mission to improve quality of life by collecting, sharing, and interpreting public data for effective decision making.

Valerie Knight-Di Gangi, VCF's program officer, explained that the report has been a great opportunity to bring together key stakeholders and identify needs and issues. "The data is very clear, demonstrating both positive aspects of as well as disparities in the Valley."

She added, "It has been professionally rewarding to see how we are looking at the whole picture and finding a way to weave in systems change. There is a good mix of things happening both in the short and long term. As such, we are committed to finding solutions and not just placing a band-aid over something systemic."

The 2019 Valley Community Index picks up where the 2016 report left off and also serves as the Community Health Needs Assessment (CHNA) for Griffin Hospital and the Naugatuck Valley Health District. The CHNA is a legal requirement for the hospital, based on the Patient Protection and Affordable Care Act and also part of Naugatuck Valley Health District's national accreditation responsibilities. The data is additionally a significant step forward in the Valley Community Health Improvement Plan (CHIP), which Griffin develops in an effort to make the community a healthier place overall.

Based on the findings of the most recent Index, Griffin Hospital and health district will be focusing on three areas: heart disease, maternal and infant health, and mental health issues, especially as they exist around situations like the opioid crisis.

The data captures trends that change and evolve over time. For example, the 2016 Index showed that 26% of Valley children live in low-income households but that number has risen to 28% in 2019.



Patrick Charmel, Griffin Hospital President & CEO, pictured left, speaks to attendees about the social determinants of health, which play contributing factors in well-being.

Smart Investment

Using Data to Create Community Impact

Lynne Bassett Perry serves as Chair on the VCF Board of Directors and has a very personal connection with the Community Index.

“I grew up with VCF. My father was one of the founding members and, when he left the Board, I decided it was time for me to take on that kind of responsibility within the community.” She described how the W. E. Bassett Co., which produced personal care products in Shelton, influenced how she and her family approach philanthropy.

“We ran the business with a strategic plan and the model of continuous improvement, knowing that you can’t change what you don’t measure.” The ability to accurately and definitively address community impact is why Perry and her father, Bill Bassett, through the Bassett Family Fund, are so supportive of the Community Index and are proud to be one of the primary funders.

Considering the information gleaned from the 2016, and now 2019 reports, Perry feels that the effort is definitely a marathon rather than a sprint, and she is excited about how the information is being put to use in that long-term effort. “This is significant work, and not just data sitting on a shelf. As we align with Griffin Hospital and the CHIP work, we’re seeing community action in real time.”

The 2019 Valley Community Index

was formally presented to the community on October 22nd by VCF President & CEO Sharon Closius along with a panel of community leaders who were able to illustrate not only the value of the data but how the community can move forward with it.

Perry explained, “With the Index and the focus areas that are evolving from making this information available, we can strategically invest dollars behind specific programs and services to make an impact as opposed to a more generalized grantmaking methodology. We’ve gained momentum with this second index and now there are even more people at the table working together to achieve similar outcomes.”

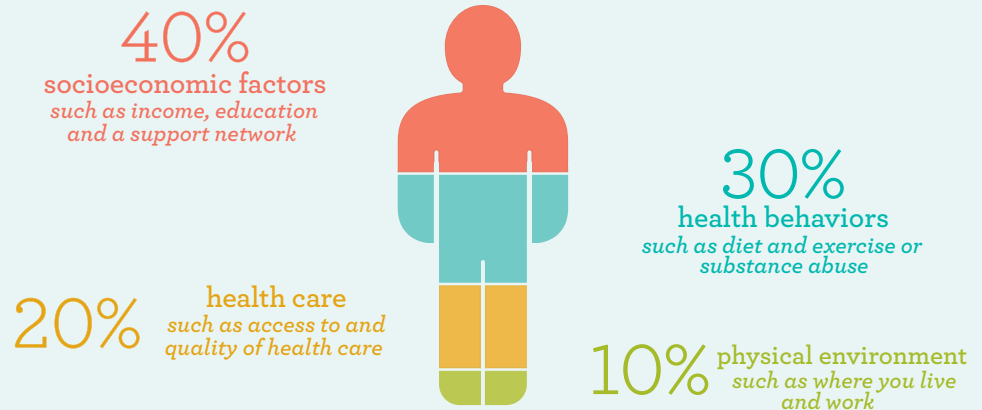
She added, “While both the positive and negative trend data is interesting, the Index isn’t released with the intent of shocking anyone.

Instead it helps to paint a reality of many individuals and families throughout the region. It also creates a call to action. The report doesn’t go into the why behind the data, but instead serves as a resource so people can figure out how to address challenges in the community. I like that it’s very user-friendly and think VCF did a great job of presenting the material so a lay person can understand it without being overwhelmed. To me, that’s critical.”

On a personal note, Knight-Di Gangi said that the Index has reminded her of one of the best reasons to admire the Valley. “I am truly grateful for the support I’ve had while working on this community-driven report. Everyone sees this endeavor as a collaborative effort and I believe there is a strong sense that our community partners can find solutions if we all work together.”

WHAT GOES INTO YOUR HEALTH?

The conditions that shape the health a person experiences are known as the **social determinants of health**.



Planned Giving

VCF welcomes an anonymous individual to the Gates Society, the Foundation’s planned giving community.

Your planned gift will impact the charities you’re passionate about forever, regardless of the amount. Call us at 203-751-9162 or learn more at valleyfoundation.org.



Community Investment

2018 Grant Impact

VCF's responsive grant distributions are announced each year, providing details about the receiving organization, the grant amount, and its purpose.

But what happens after VCF awards a grant to a nonprofit? These grants can range from a single-year distribution to a multi-year award and can provide operating support, assistance with capacity building efforts, or a particular project. As part of VCF's terms of grant, the receiving organization is required to report on outcomes and data showing the impact of that funding – something we would like to start sharing with you.

The WorkPlace

With a single-year general operating support grant awarded in 2016, The WorkPlace was able to increase awareness of the Ansonia and Derby American Job Centers. Through multi-channel marketing efforts, The WorkPlace reached Valley residents to encourage participation in their programs. A three-part community forum series was held at the American Job Centers to acclimate area residents with the center and provide more information on services offered in collaboration with Career Resources, CT Dept. of Labor, TEAM, Valley Regional Adult Education, Dept. of Rehabilitation Services, Bureau of Education, Services for the Blind, and the Greater Valley Chamber of Commerce.



The WorkPlace holds a graduation ceremony at the Seymour Public Library for those who completed the Platform to Employment program.

Literacy Volunteers

With a three-year general operating support grant awarded in 2014, Literacy Volunteers of Greater New Haven provided programs for adults from more than 75 countries, and was able to serve 54% more students as a result of this funding. Literacy Volunteers increased the number of adult students to nearly 1,200 during 2016-2017, which represents a 23% increase since 2014. A total of 14 new tutoring sites were added during years 2-3 of this grant. As a result of these programs and services, 60% of Valley students achieved a 4-point or higher gain in reading levels. A 4-point gain is roughly equivalent to an increase of one grade level in reading, which is considered significant by the CT State Dept. of Education.

New Haven Legal

With a two-year project grant awarded in 2015, the New Haven Legal Assistance Association held weekly legal clinics targeting families of children in the Head Start program. A total of 36 families were served during year one and 49 in year two. In addition to offering one-on-one consultation, the staff conducted a Know-Your-Rights workshop on Immigration and Customs Enforcement (ICE) for 30 people. New Haven Legal Assistance Association doubled its office hours in year two, which allowed staff to better spend time with families in need and accommodate walk-ins. Over the term of this grant, parents became more familiar with the New Haven Legal Assistance Association staff and the positive experiences during year one fostered referrals by fellow parents, which contributed to a 25% increase in year two. This program has established a greater physical presence in the Valley, which has proven to be critical as the legal needs for low-income people in the region continue to grow.

Sponsored Events

The following events were supported with unrestricted funds by VCF this season:

November

St. Joseph High School

To sponsor the annual Maroon and Gold Gala on November 16th.

Derby Historical Society

To sponsor the 29th annual fundraising appeal on November 25th.

The Boys and Girls Club of the Lower Naugatuck Valley

To sponsor the 18th annual Commodore Hull Thanksgiving Day Road Race.

December

The Seymour Christmas Parade Association

To sponsor the annual Christmas parade in downtown Seymour on December 1st.

Adam's House

To sponsor the 4th annual Mistletoe and Margaritas fundraising event on December 3rd.

The Valley Council for Health and Human Services

To sponsor the 26th annual breakfast meeting on December 3rd.

In Memoriam 2019

The VCF Board and Staff reflect on the passing of VCF Board member, Frank Michaud, and former VCF Board members, Sue Coyle and Karen Stanek during 2019. In addition to their service on the VCF Board, they each were actively involved in the Valley and took tremendous strides to improve the quality of life the region.

Featured Fund

The Gates Fund

As many Featured Fund articles have demonstrated, establishing a fund is not difficult and many generous men and women have found the process uplifting and very rewarding.

What can be challenging is the process of ensuring that a fund meets the intent of the donor over time. Unlike a one-time gift to a particular nonprofit organization, an endowed fund stretches out into perpetuity. The good news is, organizations like the Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF), are prepared to keep abreast of the community's evolving character to meet its needs. The Gates Fund is a great example of the Foundations' abilities to stay within the original donor's vision for helping to improve the Valley region.

Derby residents, Frank and Ross Gates, established their fund with the Union & New Haven Trust Company approximately 70 years ago and, in doing so, expressed their desire to make a difference in the Valley. At that time, many philanthropic funds were established with trust banks. Their gift was significant and is still one of the largest funds endowed at TCF today.

As time went on, there was some question as to what the brothers intended would happen with the fund. Leaders in both New Haven and the Valley met to ensure the community would do right by the brothers' intentions.

As agreements were established to clarify roles and responsibilities, these hard-working and forward-thinking leaders learned more about the community than they expected, gleaning insight from fund documents and realizing a lack of quality grant applications from nonprofits serving the Valley. The Valley Advisory Committee (VAC) was formed to address this issue. Working first

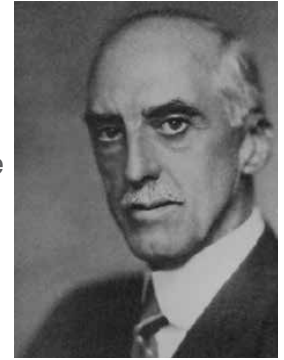
to understand the needs in the Valley, they commissioned the Mt. Auburn Report in 2001, the VAC then established the Valley Needs and Opportunities Project, which worked collaboratively with nonprofits to focus grant requests more on the Valley's needs found in the reports. It became apparent that there was substantial need in the Valley and more philanthropic funds needed to be raised. In 2004, VCF was established to build the philanthropic assets of the Valley for the Valley.

VCF started as a supporting organization to TCF, benefitting from an annual appropriation from the Gates Fund to support operations and grantmaking. Today, VCF is its own public charity and partners with TCF through an affiliation agreement. The foundations entered into their fourth affiliation agreement during 2018, ensuring a continued partnership of close strategic and operational alignment that can build a stronger community for all. Today, VCF continues to receive substantial back office support and the annual financial appropriation is over \$1 million.

Angela Powers, senior vice president for planning and operations at TCF, fondly remembers her role as VCF's first president. "VCF and its partnership with TCF is a stunning success and has exceeded the expectations we envisioned 15 years ago. Not only has The Community Foundation helped VCF distribute much needed money from the Gates Fund but they've also established more than 180 new funds to benefit the Valley as a result."

Angela said, "A typical community foundation has four goals: 1) to attract and support people who want to act as philanthropists in their community; 2) invest those funds well - in this case, TCF is the investment arm of VCF; 3) fulfill donors wishes through grantmaking; 4) provide

leadership in the community. VCF has done well identifying the needs and opportunities in the region and rallying people around those issues. The



Frank H. Gates

Community Index has coalesced that vision for the Valley, started all those years ago, first by the Gates brothers and then again when VCF was founded."

She added, "There has always been a strong sense of community here and we knew that an entity led by a board of respected members of the Valley would be the key to long term success."

Given that the Gates Fund is unrestricted, the Board has discretion on where to make grants for the most impact and the ability to support a broad range of nonprofit organizations. Unrestricted funds allow community foundations to provide leadership on major community issues and the 2019 Valley Community Index is a shining example of a tool to help make a difference in the region.

"I'm thrilled with how VCF and TCF's relationship with them has evolved and I'm very proud to have been associated with this effort in its formative years. The Gates Fund is crucial to our future and that flexibility in discretion means the Board can do what's right at the time, keeping the fund relevant and something we believe the brothers would support wholeheartedly. Even if someone doesn't want to start their own fund, they can contribute to an existing fund, knowing that VCF and TCF are looking carefully at the community and how to make this a better place for us all."



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Good News About the Valley

VCF Awards Over \$860,000 in Single- and Multi-Year Grants

VCF is pleased to announce that \$860,400 has been awarded as a result of its 2019 Responsive Grants process. This includes support for 7 new organizations as well as previous multi-year funding for 16 additional nonprofits. These grant dollars will help provide a reliable source of funding during a time of financial uncertainty.

“The VCF Board is proud to serve as a continued source of stability for these local nonprofit organization that are providing key services to those in need throughout the Valley,” said Lynne Bassett Perry, VCF Board Chair.

Grants were awarded through VCF’s Responsive Grantmaking cycle, which is done with its partner in philanthropy, The Community Foundation for Greater New Haven (TCF). The program is funded by a generous annual grant from TCF’s Gates and other field of interest funds, as well as VCF’s unrestricted and field of interest funds. Additionally, several of VCF’s donor advised fundholders contributed from their funds to help make these grants possible. Supporting donor advised funds included the Agape Fund, the Alesevich Family Fund, the Mary Fund, the Joseph A. Pagliaro Sr. Family Fund, the Palazzi Family Fund, the Sally and Dominick Thomas Fund, the John Tyma Fund, and the Warichar Family Fund.

2019 Responsive Grant Recipients:

Area Congregations Together, Inc.: to provide general operating support for the provision of food, shelter, and support services to Valley people in need. \$120,000

Boys & Girls Club of the Lower Naugatuck Valley: to support the enhancement of the safety and well-being of facilities, staff, volunteers, children and teens. \$64,000

Catholic Charities Archdiocese of Hartford: to support the Outpatient Psychiatric Clinic for Valley children, adolescents, and families. \$75,000

Center Stage Theatre Inc.: to provide general operating support for theatrical productions and performing arts education. \$60,000

Christ Episcopal Church: to provide general operating support for the Kathleen Samela Food Pantry. \$75,000

Griffin Hospital: to support Phase 2 of a surgical expansion project to increase surgical capabilities and expand capacity to better serve surgical patients. \$50,000

Shelton Economic Development Corporation: to support the administration of the Comprehensive Economic Development Strategy (CEDS) for the Naugatuck Valley Corridor/Economic Development District. \$45,000

For more information about VCF’s grant programs, please call 203-751-9162, or visit www.valleyfoundation.org.