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A special thank you to our Valley community

Despite the challenges and adversity that so many faced during 2020, there still remains hope and inspiration during such unprecedented times. We asked members of our Valley community to submit pictures that spoke to this over the past year. Their overwhelming response is a testament to how resilient the Valley truly is.

Thank you for allowing us to share your moments of inspiration in this annual report and enabling us to shine a bright light of hope in an otherwise dark period of time. From finding humor in remote learning, to thanking our first responders, and showing gratitude in new ways, one thing is certain – we came together while apart and will continue to adjust.

Dear Community Partner,

When we say that we hope this finds you well and in good health, we sincerely mean it given the unprecedented year that 2020 has proven to be. There is no denying that we have been weathering the storm of a lifetime.

It would be a monumental understatement to say that our communities have been strained as a crisis of multiple and different events has played out over the past year. Healthcare systems have found ways to work beyond maximum capacity. Schools continue to endure major adjustments to in-person, remote, and hybrid curriculums. Working from home has become commonplace. Businesses have shuttered. Unemployment has grown. Nonprofits have scrambled to pivot and adjust to rapidly-changing dire needs. Children and families have been faced with more adversity than ever before. What's more, is that Black and Brown communities have been proven to be disproportionately affected more than others, compounding the rippling effects further than initially imagined.





VCF President & CEO Sharon Closius, 2020 Board Chair Don Smith, Jr., and 2021 Board Chair Jack Walsh

In spite of these various tribulations, 2020 has been a year of resilience for everyone at every single level in our communities.

Beneath the rampant hardship and never before seen challenges, there exists a shining light of hope, the foundational presence of community, and a collective appreciation for the silver linings found in all of this.

Many of us have found ways to come together while apart. Health, while easily taken for granted, has deservedly become a focused priority. There is a newfound regard for family, spending time with friends, and hugging those we care about. What we deem important has shifted and given way to simple gratitude. The frustrations of many new ways of life have produced a fond appreciation for what we continue to sacrifice to get through this pandemic.

Because of your commitment to the Valley Community Foundation (VCF), the region we serve, and the charitable resources we steward, we are proud to be able to assist in order to strengthen some of the most vulnerable areas of the community during a time of immensely

we are proud to be able to assist in order to strengthen some of the most vulnerable areas of the community during a time of immensely incredible need. We hope you will continue to join us in refusing to allow COVID-19 to define the long-term vision of the Valley.

While we aren't through the woods yet, we are confident that we will emerge stronger than ever before. The road will be long and difficult but, together, we can draw from one another's hope and conviction.

Together, we are resilient.

With sincere regards,

Don Smith, Tr.
Board Chair

Sharon Closius President & CEO





Impact the Valley Forever

Define the Goal of your Fund

Would you like your fund to be flexible so that it can address changing community needs and opportunities? Is there a specific charity or cause that you would like to support? Would you like to be involved in the grantmaking?

Name your Fund

This is your legacy. You, of course, can be anonymous if you prefer. Whether it is a family fund or created in memory of a loved one, the fund will still be making grants many decades from now and beyond.

Contact us

Let's have a conversation about how we can tailor your charitable goals to fit your personal situation. Whether you establish a fund now or give later via a planned gift, we will ensure your legacy and interests will be honored today, tomorrow, and forever.

of funds as referenced throughout this report. You can support an existing fund or establish a new fund with the use of cash, appreciated securities, IRA distributions, and more.

Our funds are managed through our partner in philanthropy, The Community Foundation for Greater New Haven (TCF), and their diversified investment portfolio. Over time, as the endowment grows, so do our funds and your ability to award grants.

By investing your charitable gift with us, you are increasing the long-term impact of your gift. All donations to the Valley Community Foundation are tax-deductible. When you're ready, we will work with you to prepare the fund agreement that fits your philanthropic goals.

Impact the Valley for generations to come by creating a permanent endowed fund. Call (203) 751-9162, visit us in person at 253-A Elizabeth St., Derby, CT or view our website at www.valleyfoundation.org.

VCF's Pivot During the Pandemic

There was once a strong feeling of hope and anticipation about the start of a new decade. That optimism dramatically changed with the onset of the pandemic. Individuals, nonprofits, schools, and corporations around the globe rapidly and fundamentally changed every aspect of life to keep moving forward.

These extraordinarily difficult times however, also brought out the best in people. Like many others, we, at VCF, also found ways to pivot our work in order to assist nonprofits and our Valley community. In doing so, we adapted our grantmaking process to respond to the new needs of area nonprofits, pulled together community partners to keep critical work flowing, and our intrepid Board of Directors showed our collective gratitude for this resilient Valley.

Grantmaking During the Pandemic

Effective grantmaking has often been both part science and art. Learning how potential grantees not only determine the need for their services but also how they plan to address that need have been key components of grant applications for years. In light of COVID-19, the Valley's traditional grantmaking processes have forever changed.

In recent years, the Valley Community Foundation (VCF) Board of Directors began making substantial multiyear general operating grant commitments to the region's nonprofits based on significant due diligence and recommendations from staff. More than \$1.1 million was granted out from 2016-2019.

When the pandemic hit in early 2020, the VCF staff immediately embarked on a listening journey by reaching out to area nonprofits to learn what support was needed most. The response was clear and consistent - provide as much unrestricted funding as quickly as possible to help maintain daily operations.

The Community Foundation for Greater New Haven (TCF), and VCF's Board and staff answered the call. Staff dramatically reduced the time to process responsive grants, and multiyear grant awardees were given the option to have second year grant payouts made in May rather than waiting for the traditional October release of funds. Nearly \$885,000 was awarded through VCF's 2020 responsive grants process.

"It was full steam ahead for Board and staff," said VCF's 2020 Board Chair Don Smith. "We wanted the community to know we were here to help in every way we could, especially by getting dollars out the door to organizations who were working tirelessly on the frontline, day in and day out."

VCF President and CEO Sharon Closius agreed. "In a short period of time, we transitioned from the ways in which we traditionally conducted business to focusing on how we could be of the most help to the region. We are proud of all of the grant assistance we provided and look forward to continuing to listen to what the needs of the community are now and after the pandemic is behind us once and for all."

Together in Partnership









COVID-19 Response & Recovery

Pulling Together

The Valley's unique, hard-earned reputation of collaboration was tested unlike ever before during 2020. Very early in the pandemic, VCF brought together the leaders of the Valley United Way, Greater Valley Chamber of Commerce, and Valley Council for Health & Human Services to form a collaboration and establish the Valley Community COVID-19 Response and Recovery Fund. With our community partners, we were able to spread the word so donors would know how they could specifically help Valley nonprofits during this time of adversity. In turn, this

VCF's Pivot During the Pandemic

fund also provided a single, streamlined path for Valley organizations to request COVID-related grant funding. See pages 8-9 for details.

Communication is key during any crisis. Fortunately, the Valley Council for Health & Human Services met monthly pre-COVID to share information and explore further opportunities to integrate programs. Once executive orders prevented in-person meetings, it was critical that Valley organizations had a means to communicate through the fast-changing nature of this new landscape.

VCF immediately arranged for the Council to make use of the Foundation's teleconferencing services so the nonprofits could participate in calls twice per week. During these convenings, dozens of Valley organizations were able to stay informed by sharing updates from the Center for Disease Control, Naugatuck Valley Health District, Griffin Hospital, and local subject matter experts. VCF also provided communication support to help update the Council's website with pertinent details for member organizations and their clients.



In the fall of 2019, VCF served as the centralized hub to create the Valley Complete Count Committee (VCCC) to improve the response rates for the 2020 U.S. Census. The data, which is collected every 10 years, is critical in determining the funding for municipalities, schools, and nonprofits. Even with the disruption of the lockdowns, the Census still needed to be completed during 2020.

Before the start of the pandemic, VCF produced materials in both English and Spanish that

described the importance of completing the census. In keeping with COVID-19 guidelines, VCF moved the VCCC meetings online to regroup and develop new strategies to get the census message out.

Among many modified efforts, libraries distributed brochures via curbside book checkout and food pantries included materials in food pickups. As a result, more than 13,000 census materials were delivered to the general public, which yielded a Valley self-response rate that outperformed the state.

A Committed Board

Leading by example, the VCF Board of Directors agreed in March of 2020 to redeploy the balance of funds budgeted for events to show appreciation for frontline heroes.

From their homes during quarantine, Board members made calls to learn what was feasible given the restrictions that were put in place to slow the spread of COVID-19. Given VCF's role in connecting community resources, it was natural that the Board would seek a way to support frontline workers and local businesses as part of this effort.



David Grant Caterers, Spice Catering Group, and Tea with Tracy offered creative ideas to ensure VCF was able to provide meaningful demonstrations of appreciation. A coordinated series of meals and snack boxes were delivered by Board members to local nursing homes and assisted living facilities.

Members of the VCF Board also worked with BJ's Wholesale Club in Derby to put together safely-contained care packages of assorted snacks and power drinks for first responders. BJ's delivered

inequity social imp

pre-packaged boxes of snacks to the VCF office and donated several cases of bottled water to show their support as well. Board members then personally dropped off snacks and beverages to nearly 30 police departments, fire houses, and ambulance corps throughout the Valley.

Board members also worked with Mizzi Cosmetics, a Connecticut-based beauty supply company owned by a former Ansonia native, to put together products for the staff at Griffin Hospital. More than 400 care packages of lotions and creams designed to treat the hands and faces ravaged by

sanitizer use, masks, and other personal protective equipment were delivered to the hospital's health care providers.

Though the tokens of appreciation were small in comparison to what recipients were risking to help others, those who received a meal or care package took the time to express their thanks in handwritten notes, on social media, or with phone calls, reinforcing the message of how powerful and resilient a community can be when it works together. 💙

















Despite a year of strife, many of us have found opportunities within the challenges by coming together in new ways while apart during the pandemic. In response to COVID-19, the Valley Community Foundation, Valley United Way, Greater Valley Chamber of Commerce, and the Valley Health & Human Service Council partnered during March of 2020 to establish the Valley Community COVID-19 Response and Recovery Fund.

The fund has complemented the work of federal, state, and municipal government efforts and expands local capacity to address all aspects of the outbreak as efficiently as possible. Since inception, this fund has rapidly deployed resources to organizations throughout the Valley that serve the region, especially to those who are disproportionately impacted by the coronavirus and its associated economic consequences.

On behalf of our nonprofit partners, we are grateful for the donors who demonstrated a collective passion for the communities we serve and thank you for your meaningful contribution to this ongoing effort. While the road to recovery is long and uncertain, there is incredible work being done throughout the region to ensure our community cannot only weather this storm, but ensure that the Valley will thrive for years to come.

\$293,066

Total contributions during 2020

184
Total number of gifts

2020 Overall COVID Fund Grantmaking Summary

4 Rounds of grantmaking 51 Total grants awarded \$197,950 Total funding provided

Protective Equipment and Cleaning

\$97,850 – Total amount 26 grants awarded

Health and Technology

\$49,400 - Total amount 13 grants awarded

General Operating Support

\$43,700 – Total amount 10 grants awarded

Basic Needs

\$7,000 – Total amount 2 grants awarded

Valley Community COVID-19 Response & Recovery Fund Donors

Thank you to those who supported the Valley Community **COVID-19** Response and Recovery Fund during 2020!

Businesses and **Organizations**

BringtheHoopla, LLC Fox Pest Control **Grand Concepts** Immanuel Lutheran Church Ion Bank Foundation Iris Software. Inc. Iroquois Gas Transmission System Katharine Matthies Foundation Newtown Savings Bank Pitney Bowes Foundation-CT Precision Aerospace, Inc. Price Chopper's Golub Foundation Prudential Pump Technology Inc. The John and Carrie Santangelo Foundation, Inc. Sikorsky Financial Credit Union UI. SCG and CNG - Part of the Avangrid Family Valley Community Foundation

Valley Community Foundation Funds

Alesevich Family Fund Bassett Family Fund David M. & Gail A. Grant Family Fund Frey-Hershey Foundation Fund Jones Family Fund Paul and Gloria Konwerski Family Fund Mary Fund William & Elaine Nimons Family Fund

Samuel Rifkin Fund Seymour-Oxford Rotary Smythe Family Fund Stengel Family Fund John Tyma Fund Valley Community Foundation General Reserve Fund John & Paraskeve Vartelas 'Agape' Fund Warichar Family Fund

Donors Anonymous (2) Ms. Cathleen Adamczyk Mrs. Linda Adanti Ms. Susan Agamy Mr. Richard Anderson Ms. Rachel Andoh Mrs. Judith Augusta Mr. and Mrs. Richard Averill Mrs. Crystal Babin Mrs. Bertha Belden Ms. Karen Bentlage Mr. Gerald Bertie Ms. Karen Biercevicz Mrs. Patricia Bogie Mr. and Mrs. Robert Boran Mr. Michael Brody Mr. and Ms. Alfred Bruno, Jr. Ms. Rosemary Buchta Ms. Peggy Burg Mr. Harry Burlakoff Mrs. Christina Byrnes Dr. and Mrs. Chris Carson Mr. and Mrs. James Casagrande

Mrs. Gail Catlin

Mrs. Nancy Cetorelli Ms. Julian Chipkin

Ms. Sharon Closius

Ms. Theresa Conroy

Mr. Brian Coppolo

Ms. Carolyn Cutaneo

Mr. Peter Dagostine

Mr. Thomas D'Ambrosio

Mr. Dan Debicella

Mr. Gregory DeStefano Mr. Dominick Di Gangi and

Ms. Valerie Knight-Di Gangi

Mr. John DiMatteo

Ms. Margaret Domorod

Mr. John Donohue

Mr. and Mrs. Michael Dota

Ms. Jane Dowty

Mr. Eugene Driscoll

Mr. and Mrs. Walter Drozeck

Mr. Michael Duncan

Mr. and Ms. Charles Dziedzic

Ms. Wendy Eibsen

Mr. Robert Evans

Mr. and Mrs.

Robert Federico

Mr. Robert Fiscus

Mr. and Mrs.

Raymond French

Mrs. Wendy Gamba

Mrs. Joanne Gil

Mr. Leroy Glover and

Ms. Catherine Wesoly

Ms. Dorothy Godorecci

Mr. Mark Goumas

Ms. Sheri Grier

Ms. Elizabeth Guerrera

Mrs. Jean Healey

Mr. Jim Himes

Mr. and Mrs. William Holden

Ms. Susan Hotchkiss

Ms. Sarah Hoyle

Mr. Paul Hujdic

Mr. Eric Jacobs

Mr. Fred Kaeser

Dr. Harriet Karkut

Ms. Joan Kayser

Mr. Kevin Kelly

Mr. David Kennedy

Ms. Patricia Kierol

Mr. Jayson Kneen

Mr. Richard Knoll

Mr. Paul Kondrath

Ms. Constance Koskelowski

Mr. and Mrs.

Stephen Kowalik

Ms. Alice Kuzman

and Ms. Janet Naber

Ms. Tracy Landolfi

Mr. and Mrs. Edward Lane

Mr. Eugene Laporta

Mr. Joe Laucella

Ms. Susan Linane

Mr. Philip Lukianuk

Mr. and Ms. John Magera

Mrs. Jennifer Magri

Mr. Steve Maguire

Mr. and Mrs. John Mahony

Mr. Graham Main

Ms. Kim Marchitto

Ms. Joanne Marino

Ms. Lynn Martin

Mr. Jonathan Masi

Ms. Geraldine

McFarlan Saunders

Ms. Jan McLean

Ms. Pamela Miller

Ms. Aleta Miner

Ms. Agatha Mingolello

Mr. David Moll

Mr. and Mrs. David Morgan

Ms. Diana Musante

Mr. Bruce Nichols

Ms. Judy Nicolari

Ms. Marian O'Keefe

Mr. Fred Ortoli

Mr. and Mrs. David Ortoli

Mr. Joseph Pagliaro, Jr.

Ms. Joan Payden

Ms. Kimberly Phipps

Ms. Mary Plunkett Kruger

Ms. Catherine Poole

Ms. Melissa Pucci

Mr. Roy Remlin

Mr. William Schoonmaker

Mr. and Mrs. Walter Serben

Mr. and Mrs. Donald Smith. Ir

Mr. Michael Smith

Dcn. and Mrs. Bradford

Smythe

Mr. David Snyder

Ms. Mary Sorcinelli

Mr. and Mrs. Gene Sorcinelli, Jr.

Ms. Karen Spargo

Mr. Leon Sylvester

Ms. Patricia Tarasovic

Mr. James Tickey

Mr. John Trovarelli

Mr. and Mrs. William Turecek

Ms. Thalita Vaz

Ms. Jane Wakeman

Mr. John Walsh

Ms. Fiona Ward

Mr. Marc Weissman

Mr. and Mrs. Thomas Welch

Ms. Alicia White

Ms. Carlene Williams

Mr. and Ms. Erwin Williams

Mr. Karthik Yakkati



LOBAL PANDEMIC PO

Stewardship of Charitable Assets

Stewardship of Charitable Assets

The Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF) have been affiliated for the past 17 years, and the assets entrusted to VCF since 2004 have been invested and managed by TCF. Access to TCF's commingled investment management program affords VCF funds the benefits of a diverse, long-term and global endowment model by providing direct access to 47 world-class institutional investment managers specializing in more than seven distinct and differentiated asset classes.

VCF posted a return of 17.6%, net of the expense of managing the Commingled Fund, against the

market benchmark of 13.4% for the year ended December 31, 2020. Even during unprecedented times in 2020 with the various impacts of COVID-19, extreme market volatility and dislocation, the annualized net return of the Commingled Fund for the trailing 3, 5, 7, and 10 years has consistently outperformed the market benchmarks and generated more than the VCF's effective spending rate in each period. It is due to the design of the spending policy and calculations over a trailing five-year average that distributions can be managed in a predictable way that both keep pace with inflation and provide for financial resources into the community.



Raymond Oppel
Treasurer, Valley
Community Foundation



INVESTMENT PERFORMANCE

Annualized, expressed as a %, and net of investment expenses.

Trailing Trailing Trailing Trailing Trailing Periods ended 31 December 2020 7 Years 10 Years (expressed in percentages) 1 Year 3 Years 5 Years Actual Results (net of expenses) 17.6 9.3 10.1 8.9 9.3 Market Benchmark 13.4 7.9 8.9 7.5 6.9 Value Added 4.2 1.2 2.0

 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's target allocation.

Past performance is no indication of future results. The Commingled Fund is managed by The Community Foundation for Greater New Haven, Inc., which is a Connecticut registered investment adviser.

FINANCIAL POSITION				
No. of the contract of the con	2020	2019		
Assets Cash and cash equivalents Investments at market value - component funds Investments at market value - organization funds	\$ 685,226 21,635,285 10,130,759	\$ 825,340 19,064,391 8,853,135		
Total investments	32,451,270	28,742,866		
Contributions receivable Other assets Furniture and equipment, net of accumulated depreciation	72,000 4,200 46,696	15,000 3,850 52,249		
Total assets	\$ 32,574,166	\$ 28,813,965		
Liabilities and Net Assets Accounts payable and accrued expenses Organization funds Grants payable	\$ 16,814 10,130,759 43,869	\$ 7,865 8,853,135 191,568		
Total liabilities Net assets without restrictions	10,191,442 22,382,723	9,052,568 19,761,396		
Total liabilities and net assets	\$ 32,574,166	\$ 28,813,965		

STATEMENT OF ACTIVITIES					
Revenue, Gains and Other Support	2020	2019			
Contributions Less: contributions to organization funds	\$ 1,986,133 (198,408)	\$ 2,203,963 (545,563)			
Net contributions Investment gain, net Investment Income from Organization Funds	1,787,725 3,072,996 52,850	1,658,400 2,727,552 94,358			
Total revenue, gains and other support	4,913,571	4,480,310			
Expense Grants approved, net Less: grants from organization funds Total grant and program expense	1,963,333 (331,082) 1,632,251	1,717,941 (296,132) 1,421,809			
Grants for program management and direct charitable activities	395,996	378,229			
Net grant and program expense	2,028,247	1,800,038			
Development, donor services and fund stewardship Financial, endowment, and investment management	164,998 98,999	157,596 94,557			
Total administration expense	263,997	252,153			
Total expense Increase (decrease) in net assets Net assets - Beginning of year Net assets - End of year	2,292,244 2,621,327 19,761,396 \$ 22,382,723	2,052,191 2,428,119 17,333,278 \$ 19,761,396			



NEW FUNDS

The Valley Community Foundation (VCF) is here to help you make a difference in the community and support the causes you care about. Every grant VCF makes comes from a gift made by someone like you. When you establish a charitable fund with us, you choose the name and purpose. Our commitment is to ensure your wishes are carried out.

We offer various types of funds to reflect your specific philanthropic goals and ambitions. In 2020, 11 funds joined VCF. Each was established for a different reason and will help address a unique cause. We are proud to share their stories with you in this annual report. Please contact us if you would like to learn more about establishing a fund. Together, we can find a solution that best fits your philanthropic plan and perpetuates your values. \checkmark





Derby Historical Society Organization Fund

FUND TYPE: ORGANIZATION FUND

It is often said that the soul of a community can be found within its history. As the steward of the Lower Naugatuck Valley region's colonial past, the Derby Historical Society (DHS) promotes that legacy and has taken steps to ensure that those today and far into the future will have the opportunity to explore and enjoy its wonderful story.



has been around for a long time and we are lucky our predecessors provided a financial situation that enabled us to create this fund. One of our main objectives is to grow this fund so that we can properly cover the costs associated with keeping our doors open. Over time, we would like to leave members of future DHS Boards with a continuously improving financial position than what we inherited."

Albert "Duke" Misiewicz, Board President, said, "We understand that we occupy temporary roles as stewards for DHS, which, itself, is a small nonprofit. DHS does not have the financial expertise within our organization to manage investments. The Valley Community Foundation (VCF), through its affiliation with The Community Foundation for Greater New Haven, has the ability to invest and administer the resources in our reserve fund, which is now part a large investment pool. This is a tremendous benefit as it allows our staff and volunteers to better allocate limited resources and promote local history."

Daniel L. Bosques, Executive Director, explained, "DHS

Duke added, "VCF has a reputation for helping nonprofits in the Valley. The decision to invest our reserves with VCF is a win-win for everyone involved and represents the direction we want to be heading."

DHS has a longstanding relationship with the VCF. When it came time for the DHS Board of Directors to evaluate the financial future of the Society, it was a natural choice to create an organization fund at VCF. As an investment vehicle, this organization fund aligns with the long-term goals of the Society and allows the organization to accept bequests, non-traditional gifts such as securities, real estate, and life insurance through VCF.

DHS is based out of General David Humphrey's house on Elm Street in Ansonia. The house was originally constructed in 1698, long before Ansonia, Seymour, and Oxford separated from the City of Derby. For 323 years, there have been logs burning in the fireplace and an open hearth for cooking. Standing the test of time, it is here that DHS holds many of its historic programs and events.

One such program is A Day in 1762, which has run continuously for 40 years and is the backbone of the Society. The program provides fifth grade students

with an opportunity to have a hands-on experience of what life was like back in colonial times for someone their age.

"Just like you pass on your own family stories to gain a better understanding of who you are, the Valley's colorful past is a great way to foster a sense of pride within our community," Duke said. "Through this fund, it is our responsibility to preserve the past so that others in the future can share that same appreciation." 🖤

"She fully believed in opening her students' eyes."

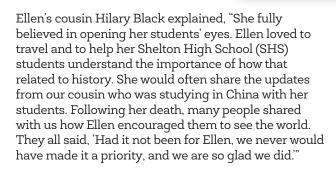


Ellen DuBoff Memorial Scholarship Fund

FUND TYPE: SCHOLARSHIP FUND

Memorializing someone special who made an impact during their life is an incredibly meaningful way to perpetuate their values.

When Ellen DuBoff passed away suddenly, both her family and the Shelton community came together to remember her fondly. Reaching beyond just memories, her friends, family, and former students alike worked with the Valley Community Foundation (VCF) to create the Ellen DuBoff Memorial Scholarship Fund.



Ellen grew up in West Hartford, attended Syracuse University, and began her career in Shelton teaching English, eventually shifting to history. She named her dog Yogi Berra because she loved both dogs and the Yankees. Yogi was adopted by Hilary's family and



the children now shower him with love. Ellen's loyalty and generosity is reflected in her special relationships with everyone in her large, extended family and with members of her school community.

Through this fund, scholarships will be awarded to graduating SHS seniors and members of the girls track or cross-country teams who are continuing their education. Given that Ellen coached the women's teams, combined with her dedication to both teaching and learning, this focus served as a fitting way to

remind everyone of a woman who made a positive impact on those whose lives she touched.

The idea to establish a fund in her memory came from her friends and former colleagues at SHS. The suggestion immediately resonated with Ellen's family because of how it supports her values and that it comes from the Valley people who meant so much to her.

After speaking with VCF President and CEO Sharon Closius, and working with VCF Donor Services Associate, Beth Colette, setting up a fund in Ellen's memory was much easier than expected. The family agreed that this was a wonderful way to memorialize Ellen for her warmth, generous personality, and passion for students. 🖤

Neville Osmond Forsythe Senior Memorial Fund

FUND TYPE: DESIGNATED FUND

Neville Osmond Forsythe, Sr. began his culinary career while serving as a Mess Specialist in the United States Navy. After graduating from the Culinary Institute of America in Hyde Park and working for several other restauranteurs, he opened his own restaurant in Chattanooga, Tennessee.

His daughter Loni Richards remembers Chef's Underground Café as a big part of her childhood. "There was a really cool vibe. The restaurant was below the sidewalk level and so, while sitting at the tables, you could see the feet of people passing by on the sidewalk. And the food - international and Caribbean - was absolutely amazing."

It was a family-owned and operated restaurant in which Loni along with her brother Neville II, sister Nicole, and mother Marilyn, worked before Chef's Underground Café closed. Not long after, the family opened Mrs. B's Reggae Café to offer the only dine-in Jamaican restaurant in the Chattanooga area. "My dad encouraged my mother to create a restaurant named after her late mother, Frances Brown. There was a stunning picture on a wall in the restaurant of my grandmother back in Jamaica wearing a long blue dress. It was like she was right there with us all the time."

Chef, as Neville was popularly known, would drive with his wife to source special ingredients in Atlanta for the unique dishes. It was on one of these trips in 2019 that an accident claimed his life and injured Marilyn.



Loni, who also served in the Navy as an officer, was able to lead the military funeral honors for her father. She described the emotions she felt then and, later, as the family shuttered Mrs. B's. "We wanted to do more. We knew that a funeral wasn't how Chef would want to go out. He would want smiles and laughter so we planned a memorial service in February 2020."

She called on her skills as the President and CEO of the nonprofit organization Service After Service, which supports the community with a focus on veterans. Some very kind friends offered the family the use

of their theatre to hold a special event that raised enough money to establish this fund. Its primary focus is to offer scholarships to students who want to pursue a career in culinary arts and support Boy Scouts who struggle to participate in Scouting because of a lack of resources. "Dad was very involved in Scouting," she said.

The family is still working to build the endowment and ensure that Chef's legacy is permanent. "We are all very excited about how this has come together," Loni added.

"When dad passed, we all felt it in different ways," she said. All the siblings, Nicole, Neville II, Sam, and Loni, are closer now than ever before. "This was a perfect way to preserve his memory and share his legacy with others. Establishing this fund has been empowering and continues to bring us together every day, just like how dad's food brought loved ones together in his restaurant."

"This was a perfect way to preserve his memory and share his legacy with others."

Carol Ann Hyder Memorial Fund

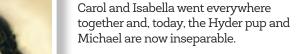
FUND TYPE: DONOR ADVISED FUND

While it's never easy to lose a loved one, doing something in their memory is a way to ensure their legacy is never forgotten. Michael Hyder established the Carol Ann Hyder Memorial Fund after his wife's passing for a very simple reason. He loved her very much.

Carol was a lifelong Shelton resident who graduated with honors from St. Mary-St. Michael School and, later, was among Shelton High School's Class of 1956. It was there that she met Michael, whom she would marry right after high school and proudly became an Army wife. Although she spoke no German, she set up house in Germany while he was stationed there. Once they returned home years later, Carol worked as a secretary at the Farrel Corporation.

Carol was a woman of great strength and courage. She battled tuberculosis as a young adult, and later diabetes, cancer, and a stroke. Members of her family remember Carol as a giver who always went out of her way to do something nice for her family. She loved to sew, cook, and read, and had a special appreciation for Hallmark movies. Most notably, she loved music and dancing with her beloved husband.

The couple had no children but Carol enjoyed the company of animals, especially her toy poodle named Isabella.



The Carol Ann Hyder Memorial Fund is donor advised in which Michael would like disbursements from the fund to honor Carol and support causes that were important to her. Because of the strength that she showed in battling her different medical conditions, Michael decided to honor his wife by supporting the Shelton High School scholarship program to a graduating student who has demonstrated strength in facing and conquering

adversity and has a strong desire to succeed. After Carol's passing, Michael has updated his estate plans to further support her fund. Eventually, the fund will become a designated fund to continue to provide support to the scholarship as well as organizations which assist individuals with cancer and/or diabetes.

Michael felt so much love and admiration for his beloved wife, stating "She was the strongest and most intelligent woman I've ever met." He came to believe she was capable of anything and relied on her in many ways. Through this fund at the Valley Community Foundation (VCF), he honors his wife's perseverance throughout her life and just how special Carol was to him.





Wasil Katz Scholarship Fund

FUND TYPE: SCHOLARSHIP FUND

Teachers often leave lasting impressions on those with whom they interact. For the educators that create scholarship funds, their values are exemplified through a legacy that will last in perpetuity.

Many teachers and students alike fondly remember Wasil Katz. Wasil spent 30 years educating elementary school children in Shelton.

"Wasil was always concerned about his students and their future," Wasil's niece, Harriet Karkut, recalled of her uncle. "He wanted them to have the best opportunities possible."



A lifelong resident of Shelton and a veteran of the United States Army, Wasil enjoyed spending time with students and singing with the Stratford Congregational Church. "He had great musical talent," Harriet said. "He sang operettas and loved teaching groups of kids about music. He was born with a passion for it and sang with a very good voice."

Before her uncle passed away, Harriet spoke with CPA, Ray Oppel, about some financial matters since she was taking care of both her uncle and her mother for a time. Ray fondly remembered Wasil



from school, back in a time when he was a student.

"Mr. Katz was my sixth-grade teacher and it was wonderful to have the opportunity to see him again before he passed away," Ray said. "I also informed Harriet about my role on the Valley Community Foundation (VCF) Board of Directors and told her how simple it would be to establish a scholarship in his name."

Although Harriet's role as caregiver had come to an end, she wanted to continue to honor Wasil's memory and ensure that his legacy would live on through the students who were so important to him. That is why

she decided to establish the Wasil Katz Scholarship Fund at VCF. A testament to Wasil's dedication to learning, this fund will support graduating Shelton High School students who pursue a teaching degree at a college or university.

"Wasil would have loved to know that a scholarship would be made in his name to benefit students aspiring to be educators themselves," said Harriet. "I cannot think of a better way to honor his memory and his life-long commitment to teaching." ♥

"He sang operettas and loved teaching groups of kids about music."



Julia Krizan Scholarship Fund for the Arts

FUND TYPE: SCHOLARSHIP FUND

One of the most meaningful ways to memorialize someone for their life's passion is through a scholarship fund to support those striving towards something similar.

Erik Martire, Interim K-12 School Counseling Curriculum Leader with the Shelton Public Schools, described the impact that funds like the Julia Krizan Scholarship Fund for the

Arts have on students. "The Shelton community has an amazing tradition of giving back to its graduates," he said. "The people behind these funds are creating opportunities for our young people while, at the same time, demonstrating the value of furthering their education."

The Julia Krizan Scholarship Fund for the Arts was established by Shelton High School (SHS) graduates, Lawrence and Leonard Krizan, to honor their mother, Julia, who was an accomplished fine artist. In supporting her passion for the arts, the brothers decided that the scholarship should benefit a graduating SHS senior who shows outstanding artistic promise.

After Lawrence passed away in 2019, his ex-wife made a contribution to this fund as a testament of how meaningful the scholarship was to him. Because of this kind gesture, the fund became endowed at the Valley Community Foundation (VCF) and will support graduating SHS art students in perpetuity.



Erik explained, "The VCF staff was very helpful in walking me through the process. The Krizan Scholarship is our largest individual art recognition award with an annual distribution of \$1,000 to a single student."

Acknowledging the contributions and skills of students is a priority at the school. "We have a small but incredibly dedicated art staff

that is proud to showcase our students," Erik added. "An award such as the Krizan Scholarship provides them with the ability to do something special."

"Paying for college has become quite an intimidating proposal," Erik said. "Fortunately, we are able to make quite a big statement when we connect students with opportunities that can lessen their financial burden in continuing their education."

Erik appreciates the Krizan family's dedication to valuing the arts in the Shelton community. "I grew up in Shelton and love the history behind our scholarships," he continued. "It's a wonderful way to appreciate the people who make both our town and school community truly special."

He concluded, "On behalf of the SHS community and the future students who will continue to be presented with new opportunities, I would like to extend our sincere appreciation to the Krizan family for establishing this fund."

Dr. Carol Merlone Scholarship Fund

FUND TYPE: SCHOLARSHIP FUND

They often say that an investment in education pays a lifetime of dividends. Carol Merlone, Ed. D., firmly believes in the power of education and often uses her own experience as an example.

"A little girl who grew up in Ansonia, became a superintendent, and found herself traveling to the United Arab Emirates as a speaker in the third annual International Education Symposium in 2011, presenting on the brain and education," Carol reflected. "You never know what doors education can open."

Her 35-year career included 14 years of classroom work, nine in administration, and 12 as superintendent, all of which was spent in Ansonia with the exception of her first six months of work in Derby.

"I knew the children and families very well and have nothing but great memories. I wanted to give back and knew that, by establishing a scholarship fund at the Valley Community Foundation (VCF), I could make an incredible impact on the lives' of students even though we may never even meet."

The Dr. Carol Merlone Scholarship Fund will support a graduating student from Ansonia High School in the top 20% of his or her class who will be pursuing a career in education at a college or university.

"I truly believe everyone should have the opportunity to receive a good education. As a superintendent, I awarded many scholarships. I recall our business office



managing them until we made the decision during my tenure to transfer our scholarship assets to VCF for administration," Carol said. "Having a professional, trustworthy third party, like VCF, we were able to simplify our process and have the funds invested professionally, which has made the available scholarships for Ansonia Public Schools and its students stronger than ever before."

"That transfer made me think about what I could do when I

retired so that I could continue to give back," Carol continued. "As superintendent, I set aside my pay raises to help fund supplies that students needed, like uniforms. In fact, that line item came to be called 'Carol's Closet.' Eileen Ehman, grants manager of Ansonia Public Schools, suggested I ask our Board of Education to move my last raise to start a scholarship fund with VCF. I then gave an additional contribution above that amount to make up the difference so the fund could be endowed in perpetuity."

To Carol, this scholarship fund is offering more than financial support to students. It represents opportunity as well. "I have always said once a student, always a student," she said. "I believe every student should have the chance to be whatever they want to be. I really love the Ansonia kids and I want each one of them to succeed."

"I believe every student should have the chance to be whatever they want to be." FUND TYPE: UNRESTRICTED FUND

The Ortoli family has been a part of the Valley for more than a century. After decades of wide-ranging community involvement, Fred and Josephine Ortoli passed along similar values to their children Fred, Dave, and Ron. Now adults, themselves, the Ortoli brothers established the Ortoli Family Fund so the family can support their beloved community for another century and beyond.



"Our dad was involved with the Ansonia Housing Authority and our church. Mom volunteered with the American Red Cross for more than 50 years," Fred explained. "Our family schedule was always coordinated around blood drives because of the importance our mother placed on these events. We were raised with the idea that if we had the ability to help someone, we should take action," he said.

"Dad was on the Red Cross emergency response team and would go to a crisis to do what he could for victims and first responders," Dave added. "Our mother was also active with the Ladies Guild and would work on the annual festival at Holy Rosary Parish. They were always extremely involved with the community. We started this fund to honor them both so that we could continue the legacy that they started."

"Our parents always knew that while they wanted to positively impact the future, no one can see into it," said

Fred. "Nobody could have foreseen everything that happened during 2020. Hopefully the coming years will be different but it just shows how the needs of the community can rapidly change. That is why we decided to set up an unrestricted fund in which the Valley Community Foundation (VCF) Board and Staff could decide where the money would be best deployed." Dave commented, "While I now live in Wallingford, I still have a strong

appreciation for the Valley. Our brother Ron lives in Arizona and is also very supportive of this fund and what we want to do for the community in memory of our parents."

As a photographer, Fred has offered his talents to VCF and many other nonprofit organizations serving the Valley. "I am very familiar with the work VCF has done and always found those involved to be fantastic people. That is why I ultimately decided to serve on the Board of Directors. VCF has the flexibility and permanence that we were looking for, which made this a perfect fit for what we want to accomplish through this fund."

Dave agreed, "VCF supports so many efforts, which is reminiscent of all that our parents had always done for the Valley. Our hope is that we can also support the good work taking place in the region now and long after we're gone."



Dr. Beth A. Smith Fund

FUND TYPE: DONOR ADVISED FUND

Dr. Beth Smith has spent more than three decades in the field of education. During this time she served as a teacher, assistant principal, principal, director, and interim superintendent. Beth developed a reputation for putting her students first, always encouraging them to do their best. While knowledge is powerful so too is the impact of one's legacy.

After her sister-in-law passed away from cancer at a young age, Beth began to seriously consider her own end of life planning. She decided she wanted



to help the community that has meant so much to her when she is no longer here. It is often a topic many people avoid but for Beth, it led her down a path to creating the Dr. Beth A. Smith Fund at the Valley Community Foundation (VCF). "I have a great friendship with VCF President and CEO Sharon Closius," Beth said. "After we talked about this and my charitable ambitions, I decided that creating a fund with VCF was the right thing to do."

Beth has been long aware of VCF but came to know how community foundations can create local impact when Shelton High



NEW FUNDS

School entrusted VCF with the management and administration of its scholarship program in 2014. Beth was Headmaster of Shelton High School at the time and worked closely with Sharon on the transfer of the scholarship funds, which totaled nearly half a million dollars.

When it came time for Beth to create her own fund, she discussed her ambitions with her family and explained both what was important to her and why.

"I structured this fund in a way that is unique to me, which will ultimately go on to support the organizations that have helped mold me into the person that I am today," Beth said. "My faith is extremely important to me and I want to help those that assisted in my faith formation so they can continue to help others. Growing up I was fortunate to have had an amazing educational experience and spent my career in education and want others to have those opportunities.

I've served in the role of teacher, assistant principal, principal, supervisor, director and interim superintendent for 35 years so I chose a non-profit that benefits children of all ages." She has also chosen a non-profit organization that she currently supports, the Marginal Way Preservation Fund, a conservation organization in Maine, where she retreats to a condo in an area she describes as her happy place.

"Regardless of age, everyone should think about what causes are important," Beth advised. "Each one of us should consider how to support the organizations that matter most to us while we are alive in order to plan how to support them long after we are gone. You can actively participate in the decision-making process and know your wishes will be followed. People should realize how easy it is to set up a fund like this and how it often starts with a simple conversation."

"I structured this fund in a way that is unique to me, which will ultimately go on to support the organizations that have helped mold me into the person that I am today,"



Sturgis A. and Madeleine Martin Sobin Family Fund

FUND TYPE: DESIGNATED FUND

Lifelong Valley residents Sturgis and Madeleine Sobin grew roots in the community that ran deep and were meaningfully intertwined with the lives of those around them. Their success as community—minded leaders in the Valley came about not only through their natural gifts and hard work, but also through the support they received from their Valley neighbors.

Growing up, the families of both Sturgis and Madeline impressed upon them the importance of educational goals and becoming

involved in their community. Their parents led by example by engaging with local Valley organizations.

Sturgis joined his father's antique furniture restoration business and was nationally recognized as an expert in his field. "The Shop," as it was affectionately known by locals, served as a gathering place for civic discussion. With much support, Sturgis went on to become a leader in many civic organizations in the Valley, ultimately serving as Mayor for the City of Ansonia. Encouragement



and assistance from family, the community, and shared resources were vital to his success.

Madeleine was able to become a teacher in Derby thanks to local scholarships and her academic achievements. She honored that generosity by volunteering at the Ansonia Public Library for several years. She continued to support many other organizations

throughout her life, bringing the generosity she received back full circle to the community she loved. Madeleine would later receive the Luminary Award from Birmingham Health Group Services, now BHcare, for her involvement in the organization's creation and 30-years of volunteer service.

Sturgis and Madeleine were fortunate enough to realize many of the dreams they had for their children. They saw all five graduate from college and recognized how encouragement from a teacher could spark further learning. The children experienced firsthand how community programs like scouts and library clubs could help develop additional life skills and passions.

Now adults, the Sobin siblings quickly understood how the Valley Community Foundation (VCF) could steward charitable assets and make a difference for organizations and families, including their own. That is why they created the Sturgis A. Sobin and Madeleine Martin Sobin Family Fund in their parents' memory, which will support the students and teachers at Ansonia High School and Emmett O'Brien Technical High School.

Daughter, Cathy Szanto, said on behalf of the family, "We know this fund will open doors to new opportunities for others. We believe this will lead to the enrichment and betterment of the Valley and we have faith that it will also encourage the next generation of charitable givers. It is our way of reciprocating the support that we received from the community at critical moments in our lives."

"We cannot thank VCF enough for their assistance in helping us memorialize our parents' vision," she added. "We are excited to learn how this fund will be used by the students and teachers that it is dedicated to serving."



Emil J. Varga Catholic School Fund

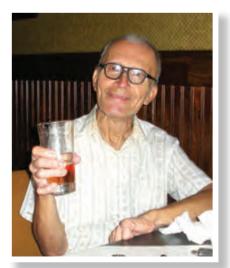
FUND TYPE: DESIGNATED FUND

Martha Dulla-Andrade has a longstanding history with the Valley Community Foundation (VCF). "Back when I owned Grassy Hill Lodge in Derby, I recall many VCF meetings taking place there," she said. "I still volunteer on VCF's Community Grants Committee each year and have known about the organization's reputation and collaboration with so many area nonprofits. VCF has a track record of always being at the forefront of meaningful Valley activities."

As a result, Martha has entrusted VCF with a special task: remembering has methor's equain Fmil I Vergo. "I

her mother's cousin Emil J. Varga. "I called him my uncle and was very close to him," she said. Emil lived in New Jersey until he fell ill. "I was his only family and the drive back and forth to check in on him was becoming too much so I moved him to Connecticut to live with me, where I could take care of him," Martha said.

Despite living with cerebral palsy and, later in life, non-Hodgkin's lymphoma, Emil would spend his free time volunteering at the local soup kitchen or food pantry in New Jersey. "He was a special man who would simply rather give to others than receive. That was his motto and that is really how he lived his life," Martha added.



"He walked everywhere he could, even in the cold, to offer his time and services to those in need," Martha said. "He was a teacher for more than 30 years who loved his community and was incredibly generous."

Throughout his life, Emil lived frugally and simply, and he wanted to make a difference in the futures of children. He was also Catholic and the church was an extremely important part of his life. "After Emil passed, I wanted to honor him and the ideals that he held so close," she continued. "This fund will support students in any grade at Assumption School in Ansonia but

can also be used to support teachers and curriculums. If there is a pressing need, this fund can be used for that as well. For instance, sometimes there are mandates that may require additional teacher certifications and the school might not have the money to fund that."

Emil's faith and conviction always impressed Martha. "He would say, 'If you don't stand for something, you will fall for anything,' and that you need faith in your life," she said. "It's heartwarming to be able to say that VCF is and will continue to be there to help in times of need. Through this fund, I am thankful that VCF will perpetuate the values that such a good person like Emil lived by."

"He would say, 'If you don't stand for something, you will fall for anything,' and that you need faith in your life,"

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.

Kathleen and Mariano Adamo Community Service Fund

John and Paraskeve Vartelas 'AGAPE' Fund

Alesevich Family Fund Bassett Family Fund

Monty Blakeman Fund

Olympia Blakeman Fund

Champagne Family Fund

Cohen Community Advised Fund

Cohen-DeToro Charitable Fund Iane C. and David B. Cohen Fund

Nick Collicelli Legacy Fund

Frank and Ann Conroy Fund for the Joy of Music

Mary Lou Cicia Cook Memorial Fund

Salvatore and Linda Tiano Coppola Family Fund

Thomas and Ruth Curran Family Fund

D'Addario Family Fund

Michael and Elizabeth Dalton Family Fund

Derby - Puglianello Sister City Fund

Walter and Bonnie Drozeck Fund

Frey-Hershey Foundation Fund

Marc J. Garofalo Cultural Experience Fund

Mario Garofalo Family Fund

Raymond and Gloria Gildea Memorial Fund

David M. & Gail A. Grant Family Fund

Guarrera Family Fund

Tyler, Brian and Zachary Haywood Fund

Carol Ann Hyder Memorial 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

Marion Shortell and Joseph Meade Fund

Carl and Patricia Miller Fund

William C. and Elaine N. Nimons Family Fund

Joseph A. Pagliaro, Sr. Family Fund

Palazzi Family Fund

Pepe Family Fund

Nina Poeta Scholarship Fund

President's Fund of the Valley Community Foundation

Sophie and Robert W. Rapp Family Fund

Samuel Rifkin Fund

Leah Rondon Fund

Anthony (Sonny) Savignano Memorial Fund

Dorothy E. & Kenneth E. Schaible Donor Advised Fund

Mary A. Schmecker Turtle Shell Fund

Seymour Public Schools Fund

Shelton CT Gaels Alumni Fund

Shelton Education Endowment Fund

Dr. Beth Smith Fund*

Smythe Family Fund

Stengel Family Fund

Sterling Opera House Endowment Fund

Sally & Dominick Thomas Fund

John Tyma Fund

Nancy Valentine Fund

Valley Bar Association Memorial

and Commemorative Fund

Valley Breast Health Care Fund

Valley Pride Fund

Alphonso and Eulalia Vitello Family Fund

Warichar Family Fund

Joe and Judy Zaprzalka Family Fund

John and Laura Zaprzalka Family Fund

. Katarzyna and Ludwik Zaprzalka Fund

PREFERENCE FUNDS

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

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



Funds of the Valley Community Foundation

DONOR DESIGNATED FUNDS

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

1920 Society Fund Edward J. & Marie M. Cecarelli Book Fund Herbert M. Clark Fund Cohen Family Book Fund Edward J. Cotter, Jr. Memorial Fund D'Addario Family Fund for the Benefit of Griffin Hospital Derby Public Library - Harold B. Yudkin Historic Preservation Fund Derby-Shelton Civil War Monument Preservation Fund Gerry Hellmann Eckhardt Fund for the Woodbridge Town Library Harvey & Gerry Eckhardt Fund for the Seymour Oxford Food Bank First Taxing District and the Mulvoy - Tarlov - Aquino VFW Post 603 Cannon Preservation Fund Neville Osmond Forsythe Senior Memorial Fund* Griffin Family Memorial Fund Health Initiative for Men (HiM) Fund

Jones Family Farms Fund for the Connecticut Agricultural Experiment Station Maureen, Megan and Katey Ryan Fund Gary and Francesca (Riggio) Scarpa Fund for Center Stage Theatre Dorothy E. & Kenneth E. Schaible Fund for the Boys & Girls Club of the Lower Naugatuck Valley Frank and Helene Skoronski Memorial Fund Donald W. & Lillian C. Smith Family Fund Sturgis A. and Madeleine Martin Sobin Family Fund* Torbi-Saldamarco Family Fund Emil J. Varga Catholic School Fund* Peter J. Vartelas Invest In Youth Fund #2 for the Valley YMCA Walsh Family Fund Henry Shelton Wells and Edith Birdseye Wells Family Fund Colonel Lloyd E. and Joan Platt Witmer Fund

ORGANIZATION AND FIDUCIARY FUNDS

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

Anonymous

Birmingham Foundation Fund

Derby Community Endowment Fund

Derby Historical Society Organization Fund*

Derby Public Library Endowment Fund

Housatonic Council, BSA Endowment Fund

Housatonic Council, BSA Fund

Edmund D. Strang Campership,

Housatonic Council, BSA Fund

Edmund & Caroline Strang Eagle Scout

Scholarship Award,

Housatonic Council, BSA Fund

Edmund D. Strang Scout Reservation Camp

Maintenance, Housatonic Council, BSA Fund

Massaro Community Farm Fund

Massaro Farm Legacy Fund

Oak Cliff Cemetery Association Fund

Oxford Land Trust Fund

Parent Child Resource Center Endowment Fund

Planetree Fund

Plumb Memorial Library Reserve Fund

Plumb Memorial Tri-Centennial Endowment Fund

Recreation Camp Endowment Fund

Rowland R. Strong and Edith H. Strong Memorial Scholarship Organization Fund Seymour-Oxford Nursery and Child Care Association, Inc. (SONCCA) Fund Seymour-Oxford Rotary Club Fund Seymour Pink Endowment Fund Shelton Historical Society Endowment Fund Shelton Land Trust Reserve Fund St. Vincent de Paul of the Valley Fund TEAM, Inc., Richard J. Knoll Endowment Fund TEAM Legacy Fund TEAM Reserve Fund Town of Seymour Endowment Fund Troop 3 - Derby BSA Alumni and Friends Fund Valley United Way Fund Valley YMCA Endowment Fund

Ritchie Fund for Plumb Memorial Library

Peter J. Vartelas Invest In Youth Fund #1

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for the Valley YMCA

Veterans of Foreign Wars Post 597 Fund

Women in Networking Fund

Funds of the Valley Community Foundation

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 Scholarship Fund Joseph 'Jay' Amico Artistic Memorial Awards Fund Ansonia High School Endowed Fund Ansonia High School Non-Endowed Fund Ansonia Public Schools Fund Ansonia Rotary Club Scholarship Endowment Fund Bruno Battaglino Memorial Fund Stella Behuniak Fund John F. Blake, Jr. Memorial Prize Rachel and William Brogadir Scholarship Fund Stanley and Irene Chlebowski Memorial Scholarship Fund Stephen and Emily Chuckta Memorial Scholarship Fund Class of 1940 Scholarship Fund Eddy Conklin Scholarship Fund Ruth H. Feinberg Connors Principal's Award Lou and Dolly DeFilippo Scholarship Fund Rosa Dell'Oso Memorial Scholarship Fund Derby High School Endowed Scholarship Fund Derby High School Non-Endowed Scholarship Fund Domorod-Youd Shelton High School Scholarship Fund Ellen DuBoff Memorial Scholarship Fund* Agnes and Helen Dubrava Fund Honorable Joseph P. Flynn and Family Scholarship Fund Francis Family Fund Louis 'Neni' Gaetano, Sr. DHS Scholarship Fund Geissler Family Scholarship Fund Brandon Giordano Football Scholarship Fund Peter S. Goumas Presidential Scholarship Fund Traci L. Haines Memorial Scholarship Fund Amos Hawley Memorial Award Arthur Hayes Jr. Memorial Scholarship Fund Randall R. Holden Memorial Scholarship Fund Eugene Imperato Family Scholarship Fund Industrial Arts/Vocational Education Fund Joey's Way Fund Wasil Katz Scholarship Fund*

Julia Krizan Scholarship Fund for the Arts* Russell & Joanne Kiley Kulawiz Fund Frank J. Lang Fund Jesse McCord Lewis Memorial Scholarship Fund Michael R. McMahon Scholarship Fund Dr. Carol Merlone Scholarship Fund* Bernice Nicolari Howard Gura Award Fund Louis L. Nicoletti, Sr. Business Scholarship Fund Anna and John O'Neil For Integrity Award Fund Anthony Pagliaro Scholarship Fund Lillian Pawlowski Fund Pam Petro Pawlowski Scholarship Fund Ann C. Petro Scholarship Fund Joseph E. Potter Memorial Fund John Quake Memorial Fund George and Beatrice Ryan Scholarship Fund V. Gerald Ryan Scholarship Fund John Sabulis Memorial Scholarship Fund Norman K. and Janet N. Santa Fund Seymour Historical Society Scholarship Fund Shelton High School Education Fund Shelton High School Endowed Scholarship Fund Shelton High School Non-Endowed Scholarship Fund Gaeton and Elizabeth Simonetti Family Fund Frank and Helene Skoronski Memorial Fund Charles P. Smith, Jr., Scholarship Fund Karen R. Stanek Memorial Scholarship Fund Rowland R. Strong and Edith H. Strong Memorial Renewable Scholarship Fund Howard Tassitano Fund Julian A. Taylor Fund John 'AL' Tiano Scholarship Fund George Vartelas Ansonia High School Scholarship Fund Peter Vartelas Ansonia High School Scholarship Fund John J. Wabuda Memorial Scholarship Fund Joseph and Pauline Warichar Memorial Scholarship Fund Alexander George Wilson, Sr. Scholarship Fund

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.

Holy Trinity Greek Orthodox Church of Ansonia Fund Raymond F. Mackowski Fund Ortoli Family Fund*

Winifred Bennett Kerins Memorial Prize

Patricia M. Kondrath Scholarship Fund

Dorothy E. & Kenneth E. Schaible Community Fund Valley Community Fund VCF Administrative and Reserve Fund



GLOBAL PANDEMIC F

CORONAVIRUS ZOOM PPE

The Gates Society

The Gates Society is a close circle of friends who share a special love and appreciation for this region and its people, by making a planned philanthropic commitment to the Valley through the Valley Community Foundation (VCF) or one of its funds.

The Society is named in honor of Ross and Frank Gates, the brothers of a prominent Derby family. In 1938, the brothers created trusts in the family name at The Community Foundation for Greater New Haven (TCF) to support broad charitable purposes with consideration that the income benefit the residents of Derby and vicinity. Today, this fund continues to support the Valley with more than \$1.1 million annually.

Joining VCF's planned giving community is simple. Let us know you have named VCF or one of our funds in your estate plan or if you would like to discuss the many options for making a difference in the Valley either now or in the future.

GATES SOCIETY MEMBERS

Twan & Karen Bentlage
Sharon Closius
Jamie Cohen
Jane Cohen*
Edmund J. Conklin*
Pat DeCicco
Walter & Bonnie Drozeck
Helen Dubrava*
Robert & Sheri Grier
William & Jo-Anna Holden
Heidi Kaplan
M. Elizabeth Kennard
Richard Knoll

Laura Lane
Robert C. Lang
Raymond Mackowski*
Mary Theresa Mahoney*
Ned Miller
Ray Oppel
David & Dale Ortoli
Fred Ortoli
Lynne Ortoli*
Joseph Pagliaro, Jr.
Dorothy Palazzi
Lynne Perry
Beth Ann Smith

Donald W. Smith, Sr.*
Brad & Marianne Smythe
Frederick Stanek
Karen Stanek*
Robert & Eleonora Van Egghen
Marc C. Vincent*
Valentina Vitali*
Jack Walsh
Donald E. Warichar
Joseph R. Warichar
Lynn Wozniak
John & Laura Zaprzalka

* Deceased

What is a Charitable Lead Trust

A charitable lead trust enables you to make a significant commitment to a charity now while transferring substantial assets to beneficiaries later. You can place cash or property into a trust that pays income to a charity for the number of years you select or for someone's lifetime. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name, most often your direct heirs, which often saves substantial transfer taxes. You can also revert the trust assets back to yourself.

CHARITABLE LEAD TRUST

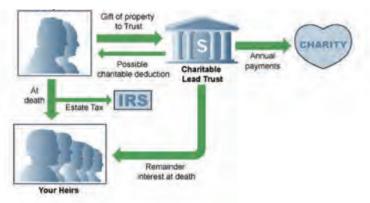


Diagram provided by HT Partners Family Wealth Counselors

Karen and Twan Bentlage Join the Gates Soc with a Charitable Lead Trust

In 2016, Karen and Twan Bentlage established the Marion Shortell and Joseph Meade Fund, named in honor of Karen's parents, who were active in the Valley during their lifetimes and set an example for their own children and grandchildren of giving back. Karen and Twan decided to establish the fund as a donor advised fund so they could have one vehicle to easily direct their annual charitable contributions to and then be able to distribute to the charities of their choice in the future.

During financial planning sessions with the Bentlage's advisor Christopher Koehm, the couple

learned of the great tax benefits of setting up a

are especially attractive right now because the

federal interest rate is so low which allows for

charitable lead trust (CLT). Chris explained, "CLTs

are great planning vehicles to use in order to provide

a stream of income for a favorite charity for a period

of time and then be able to gift assets to your children or grandchildren at the end of the term. These trusts



a greater amount of the earnings to be passed along to the non-charitable beneficiary".

Karen and Twan were able to place a generous amount into a CLT that will be invested and overseen by a trustee for the next 20 years, during which time the trust will distribute \$50,000 annually to the Marion Shortell and Joseph Meade Fund at VCF. At the end of the term, the remainder of the trust assets (including

all appreciated earnings that accrued in the trust) will be released and go to their heirs.

Karen and Twan are successful business owners who are interested in providing for charities and pass along an inheritance to their heirs in the most tax efficient way. Karen said, "This CLT is a win-win all the way around! We've worked hard and have been financially blessed. It takes some effort to plan but we want to make sure we are gifting our assets to all the causes we care about, whether family, friends and/or community, in efficient ways."

The Great Give® 2020

The Great Give® is an annual 36-hour online giving event created in 2010 by The Community Foundation for Greater New Haven (TCF) to increase philanthropy in its 20-town region, which has tremendous participation in the Valley each year.

The Great Give® 2020 was a spectacular success in bringing Greater New Haven's community together during difficult times to raise \$3.5 million online for nearly 400 nonprofits. Not only was the amount raised nearly double that of the prior year, but the number of total donors was up by approximately 40% - a sign of the commitment and generosity of the region to rally for its continued well-being.

This continues to be an incredible giving event year after year that brings so much support to Valley nonprofits. The outpouring of generosity was seen throughout the region, especially during a year like 2020, when many of these organizations faced the challenges of having to add new



programming and cut major fundraising events in response to COVID-19.

A total of \$488,000 was raised with the help of Valley residents, employees, and VCF donor advised fund holders for nonprofit organizations located in Ansonia, Derby, Oxford, Seymour and Shelton. This total represents an increase of nearly \$200,000 over 2019 and includes prizes and sponsorship support from VCF, which was used to match Valley donations. A total of 2,569 gifts were made by donors who identified themselves as living/working in the Valley. These donors gave to 254 different participating organizations.

Thank you for stepping up and making a tremendous impact on the community.

LOBAL PANDEMIC Postponed events

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Anonymous (6) Andrea Adam Cathleen Adamczyk Linda Adanti Susan Agamy Norman & Caron Alderman AmazonSmile Foundation America's Charities Lauren Anderson Richard Anderson Rachel Andoh Louis & Audrey Andrews Dominick Anzidei Aordkian Family Revocable Trust Elaine Apicella Judith Augusta Richard & Rosalie Averill Crystal Babin Bill & Pat Banfe Joyce Barcley Barnum Engineered Systems, Inc. Judith Barry William & Judith Bassett Robert Bayus Linda Beaton Bertha Belden Diane Bellafronto Kathy Bender Twan & Karen Bentlage Berkshire Partners, LLC Paul & Lynn Bernier Gerald & Wendy Berns Sara Bernstein Gerald Bertie Jack Betkoski & Sheila Glazer Betkoski Karen Biercevicz Hilary Black Michael Black Peter & Saralee Black Dawn Blakeman



Raymond & Janet Blanchette Tricia Bogie Frederick & Marilyn Bonyai Robert & Marlene Boran Pennie Branden Bringthehoopla, LLC Michael Brody Al & Kristen Bruno, Jr. Rosemary Buchta Dale & Francine Buckley William & Rita Budahazy Peggy Burg Harry Burlakoff Christina Byrnes Alan Carlson Oley & Glenda Carpp Nancy Carroll Beth Carson James & Barbara Casagrande Michael Castro Gail Catlin Barbara Cesaroni Nancy Cetorelli Patrick Charmel Annette Charniak Sandra Chemlen Reid Cherlin Julian Chipkin Barbara Cieplak-Migani Barbara Clifford Sharon Closius Cohen & Thomas **Tamie Cohen** Randall & Beth Colette Edmund & Barbara Conklin Tim Conlon Theresa Conrov Fred Constantino Laura Cook John Coppola





Michael Duncan Bob Dunn Marcia Dunn Charles & Diana Dziedzic Wendy Eibsen Gregory & Theresa Eisenbach Estate of Marc Vincent Robert Evans Robert & Helen Federico Donald & Judy Fertelmes Robert Fiscus Ryan & Courtenay Fisher Myra Fishman Pat & Mady Flynn Lester Forst Karen Francis Raymond & Esther French Friends of Lady Wildcats SHS Girls Basketball Rita Fry Pat Gajdosik Wendy Gamba Ioanne Gil Leroy Glover & Catherine Wesolv Dorothy Godorecci Joseph Gordon Gregg Goumas Mark Goumas **Grand Concepts** David & Gail Grant Great Oak Middle School Robert & Sheri Grier Dawn Grippo Cheryl Groesbeck Elizabeth Guerra Barbara Gunn Howard & Judith Gura Frank Haines Teri Haines Charles & Pamela Hannock Harborview Foods

Linda Coppola

postponed events

curb side pickup

social distancing

Donors







David & Kristy Morgan

Ralph & Lynne Harrison Barbara Hayes & Lynn Leach Jean Healey Terry Heath & Paris Stamos Heath John & Lisa Heerdt Kenneth Heidkamp & Lucille Samson-Heidkamp Kurt & Carmel Heim Richard & Barbara Hemenway Sean Henri Jim Himes James & Yvette Hodge Bart & Debra Hogestyn Katrina Holden William & Jo-Anna Holden Sheila Holdt Susan Hotchkiss Housatonic Council. BSA Andrew & Claudette Howard Jessica Howard Sarah Hoyle Paul Hujdic

Lois Hummel Denise Hunt Michael Hyder IBM Employee Services Center Immanuel Lutheran Church **Ingevity Corporation** Iris Software, Inc. Iroquois Gas Transmission System David Scott Jackson & Kathrine Palko Eric Jacobs Edward Jaekle Christine Jalowiec

Elwin Jimmo

Alan & Darlene Johns

Darlene Johns Greg, Kevin, & Jeff Johns Karen Johns-Bernier & Kristian Bernier Judith Johnson Jones Family Farms, LLC Kristine Clarke Jordan Richard & Diane Joy Fred Kaeser Harriet Karkut Joan Kayser Anna Kazmark Kathleen Kelley Kevin Kelly M. Elizabeth Kennard David Kennedy Buddy Kezel & Jean Stevenson Kate Kielev Patricia Kierol Dorothy Kisson & Virginia Duke Jayson Kneen Richard Knoll Paul Kondrath Paul Konwerski Peter Konwerski Constance Koskelowski Claire Kosloff Stephen & Cheryl Kowalik George & Camille Kurtyka Alice Kuzma Tracy Landolfi Edward & Laura Lane James Lane & Jennifer Tarozzi Robert Lang Eugene Laporta

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Brian & Rebecca Mosca Sarah Muoio Diana Musante Ronald Nappi Lisa Natkin Robert Natt Newtown Savings Bank Bruce Nichols Judy Nicolari Elizabeth Nicoletti John Nimon & Lisa Rosenfield William & Elaine Nimons Tracy Noga Nolan Family Living Trust Margaret Norris Donald & Evelyn North Marian O'Keefe David & Dale Ortoli Fred Ortoli Gerry Ortoli L. E. Ortoli Shelby Outwater Joseph Pagliaro, Jr. Su-Ann Paige-Mach Christopher Pawlowski John Pawlowski Robert Pawlowski Joan Payden Jon & Kristin Pedersen Carol Pendagast Craiq & Lynne Perry Perry Hill School Michael & Susannah Petro Kimberly Phipps Elaine Piazza Michele Piccolo Patty Picoli Pitney Bowes Foundation-CT Mary Plunkett Kruger Al & Fran Poeta

Joe Laucella

Karen Leeper

Susan Linane

Philip Lukianuk

Lesko Family Foundation

David Moll

Patricia Montini

GLOBAL PANDEMIC

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Donors

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Wendy Poeta-Tisi Catherine Poole Angela Powers Precision Aerospace, Inc. Price Chopper's Golub Foundation Prudential Foundation Melissa Pucci Ronald & Janice Pugliese Pump Technology Inc. Joan Radin Joey & Kathy Radin Aaron Rak Adam Rak John & Allison Ready Roy Remlin Linda Reznik Loni Richards David Rifkin Joseph Rogers Richard & Regina Rogers Elizabeth Root Elizabeth Rosenfield Emily Rosenfield Julia Rosenfield Shaye Rosenfield Bruce & Nancy Roshka Ellyn Ross Marguerite Royer-Parisi Henry & Lisa Rubio Rosemarie Rung Robert Russell **Tohn Sabulis** Adarsh Salian Gary & Marissa Salvati Julio & Sarah Salvati Stephen Salvati James & Bonnie Sandor Mary Ellen Sanford Angela Sangirardi

John & Carrie Santangelo Foundation, Inc. Tara & Kenneth Saranich Helene Sarracco Joseph & Loretta Scarpati Janice Schiappa Daniel Schmecker Robert & Leslie Schmidt William Schoonmaker Alex Schwartz Ethan Schwartz Marjorie Schwartz Barbara Segaloff Tane Semeraro Walter & Judith Serben Francesca Sergi Seymour Oxford Rotary Club James & Holly Sheehy Shelton Public Schools Ellen Shepard Sikorsky Financial Credit Union Allen & Barbara Simpson Elaine Skoronski Matthew Skoronski Edward & Linda Skowronski Eugene Skowronski Lorraine Skowronski-Boggis Richard Slajda George Smarz Beth Ann Smith Donald & Lisa Smith, Jr. Gary & Karen Smith Michael Smith & Melanie Cecarelli Michael Smith Brad & Marianne Smythe

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David Snyder

Community Investments

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

Note: This data reflects grants made through the New Responsive, Needs and Opportunities, Multi-year, and Community Grants programs. It does not include \$135,000 in capacity building and community initiative support. These grant programs would not be possible without the significant financial and staffing contributions provided by our partner in philanthropy, The Community Foundation for Greater New Haven



Responsive Grants

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

Boys & Girls Club of the Lower Naugatuck Valley - To provide general operating support for cultural, recreational, physical, and educational programs to Valley youth. \$160,000

Central Connecticut Coast YMCA - To provide general operating support for the Valley YMCA programming that builds healthy spirit, mind, and body for Valley residents. **\$140,000**

Friends of the Ansonia Nature Center - To support the renovation and expansion of the reptile and amphibian habitat exhibit at the Ansonia Nature and Recreation Center. \$25,000

Housatonic Council, Boy Scouts of America -To provide general operating support for scouting programs for Valley youth. \$130,000

Literacy Volunteers of Greater New Haven -

To provide general operating support for adult literacy tutoring in Greater New Haven and the Valley. \$60,000

Massaro Community Farm, Inc. - To provide general operating support to maintain a historic farm using organic practices, to provide fresh produce to the needy, and to build community through farm-based education and events. \$4,400*

Online Journalism Project, Inc. - To provide general operating support for The Valley Independent Sentinel. **\$160,000**

Oxford Historical Society, Inc. - To support renovations and repairs of Mr. Munn's Schoolhouse. \$12,400*

Shelton Historical Society, Inc. - To support repairs of the Shelton History Center complex. \$13.100*

TEAM, Inc. - To provide general operating support for multigenerational service delivery system focused on support services, early childhood, and elderly services. \$180,000

Please Note - All grants except those starred represent multi-year support.



GLOBAL PANDEMIC P

Community Investments

Needs and Opportunities Grants
Needs and Opportunities grants range
from \$250 to \$10,000 and are designed to
promptly address the needs of Valley nonprofits through a simplified application process.

Agency on Aging of South Central

Connecticut, Inc. - To support the purchase of groceries for Valley seniors who are living at 150% or less of the Federal Poverty Level and are isolated due to the pandemic. **\$2,500**

Ansonia Dr. King Bust Committee - To support technology costs and public outreach for Unity in the Community, a series of online, interactive events focusing on issues of equity, diversity, inclusion, and justice and compassion for all. TEAM is acting as the fiscal sponsor. \$5,000

Best Buddies Connecticut - To support virtual programming for individuals with and without intellectual and developmental disabilities. **\$2,400**

Center Stage Theatre, Inc. - To support the purchase of equipment to sustain theatrical programming during the pandemic. \$9,925

Connecticut Hospice, Inc. - To support the purchase of personal protective equipment to keep Home Care staff and patients from the Valley safe during the current pandemic and until its elimination. \$5,620

Connecticut Radio Information System, Inc. -

To support audio recordings of publications and originally produced interview programs for children, youth and adults in the Valley who are blind or print challenged. \$5,000

CT Audubon Society at Milford Point - To support the virtual Science in Nature outdoor environmental education program. **\$9,758**

Echo Hose Hook and Ladder Volunteer
Ambulance Corps, Inc. - To support the
purchase of technology, student chairs, tables and
a full size training mannequin for three additional
classrooms at the Community Training Center
in order to provide socially distant training
opportunities. \$9,866

Kadiwaku Family Foundation - To support investment in technology in order to reach its beneficiaries, and to offer an educative weekly series focusing on crisis and trauma support services to promote mental health and wellbeing. \$2,100

Literacy Volunteers of Greater New Haven -

To support the purchase of a Lexia PowerUp Literacy software license to enable distance literacy tutoring during and after the COVID-19 pandemic. \$550

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

New Haven Symphony Orchestra - To support the Shelton Pops Series and Online Digital Content series. **\$10.000**

Operation Fuel, Inc. - To support emergency energy assistance to families who have been financially impacted by the coronavirus and are living in Ansonia, Derby, Oxford, Seymour, and Shelton. \$20,000 (Note: Due to the COVID-19 Pandemic, Operation Fuel received two separate \$10,000 grants for this project.)

Read to Grow - To support the creation and publication of a multi-cultural picture book that children can read with their parents to learn about COVID-19 precautions. **\$8,700**

Regional Data Cooperative (DataHaven) -

To support a rapid-response wave of the next Community Wellbeing Survey. \$3,500

Seymour Ambulance Association - To support the replacement of a mass casualty/special operations trailer. \$10,000

TEAM, **Inc.** - To support the annual Toys4Kids toy drive. **\$10,000**

Valley Shakespeare Festival - To support its September production of Cyrano in Shelton as well as to continue to develop and expand its online series offerings to Valley residents. **\$5,000**

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Community Investments

Yale-Griffin Prevention Research Center -

To support the costs of a social marketing/ change plan/campaign for the Community Health Improvement Plan Heart Disease Working Group. \$7,500

Community Grants

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

Adam Wysota Foundation - To support a pilot program of the grief education and peer support program for college-aged adults. **\$2,500**

All-America Valley Basketball Club - To support the purchase of uniforms and basketballs. **\$1.800**

Annual Thanksgiving Basket Committee -

To support the purchase of perishable and non- perishable food items and supplies for distribution of Thanksgiving baskets to families in need. **\$2,500**

Ansonia High School - To support the publication of a cookbook created by students. **\$1,682**

Derby Pop Warner - To support the purchase of skorts for cheerleader uniforms. **\$2.000**

Music Mends Minds - To support the improvement of lives of patients with dementia, Alzheimer's, Parkinson's, traumatic brain injury, stroke, and PTSD through the healing power of music, which is an area of scientific inquiry that has begun to garner the attention of the medical community. \$500

Shelton Farmers Market - To support the Shelton CT Farmers Market 2020. **\$2,415**

Southford Falls Quilters LLC - To support programs which focus on new trends, tools, and techniques in the art of quilting. **\$2,500**

Town of Seymour - To support an ongoing program specifically for senior citizens. **\$2,500**

Valley Parish Nurse Program - To support the St. Margaret Mary Parish Nurse Program screenings and programs only. \$1,110

Sponsorship Grants

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

Adam Wysota Foundation

- To sponsor the 2nd Annual Dancing with the Stars benefit. **\$1,000**
- To sponsor the 5th Annual Mistletoe & Margaritas a holiday shopping night to support Adam's House. **\$500**

American Legion, Sutter-Terlizzi Post 16 - To sponsor a Bicycle Safety Rodeo for Children. \$500

Ansonia Rotary Club - To sponsor the Annual Community Services Awards presentation dinner. **\$400**

Ansonia School Readiness - To sponsor the Annual Kindergarten Registration program. **\$750**

BHcare - To sponsor the 32nd Annual Bowl-2-Benefit The Umbrella Center for Domestic Violence Services. **\$1,000**

Boys & Girls Club of the Lower Naugatuck Valley - To sponsor the 18th Commodore Hull Thanksqiving Day 5K Road Race. \$2,500

Center Stage Theatre, Inc.

- To sponsor a Teen Musical workshop. **\$1,000**
- To sponsor a Center Stage Christmas Show. **\$500**

Connecticut Council for Philanthropy

- To sponsor the 2020 Annual Conference. **\$1,000**
- To sponsor the CT Giving Report. \$500

CT Audubon Society at Milford Point - To sponsor the Return of the Osprey Fundraiser. **\$500**

Derby High School PTO - To sponsor a post prom event. **\$750**

GLOBAL PANDEMIC

Community Investments

Derby Historical Society

- To sponsor the Annual Silver Tea. \$850
- To sponsor the Cultural Speaker Series. \$650

Echo Hose Hook and Ladder Volunteer Ambulance Corps, Inc. - to sponsor a Socially Distant Career Fair at the Echo Hose Ambulance Training Center. \$1,000

Friends of the Ansonia Nature Center - To sponsor the Earth Day celebration (Note: Cancelled due to COVID-transferred for use as general operating support). \$750

Greater Valley Chamber of Commerce - To sponsor the Valley's Response to the Pandemic. **\$1,000**

Griffin Hospital - To sponsor a virtual gala. \$1,000

Junior Achievement of Greater Fairfield County -To sponsor the High School Business Challenge at Sacred Heart University. \$1,000

Knights of Columbus Bernardo Council 1350 – To sponsor a 5K Road Race. \$500

Massaro Community Farm - To sponsor Valley Shakespeare Festival shows. **\$750**

New Haven Symphony Orchestra

- To sponsor the 2020 Vision Gala. \$500
- To sponsor the 2021 Gala. \$1,000

Parent Child Resource Center - To sponsor a Chance to Shine. \$1,000

Seymour Historical Society - To sponsor the 2020 Educational Speakers Series. **\$2,500**

Seymour Pink - To sponsor the 9th Annual Pounding the Pavement for Pink 5K run/walk. **\$2,500**

Shelton Public Schools - To sponsor Strengthening the Bonds of Our Community. **\$2,500**

Shelton Exchange Club Foundation, Inc. - To sponsor the 7th Annual Indoor Mini Golf Tournament. **\$500**

St. Joseph High School - To sponsor the Maroon & Gold Gala. **\$500**

TEAM, Inc.

- To sponsor the 13th Annual Men Who Cook event. **\$1,000**
- To sponsor the annual Toys4Kids drive. \$2,500

Town of Seymour - To sponsor a Health and Fitness WALKshop. **\$600**

Valley Early Childhood Task Force -

To sponsor the 13th Annual Read Across The Valley Event. **\$1,000**

Recognition Grants

Due to the COVID-19 pandemic, the VCF Board of Directors decided to move the funds originally budgeted for recognition grants to support the organization's overall discretionary grantmaking program.

Donor Advised Grants

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

Donor Advised 64 Funds

\$11,677,008 – Total Assets 128 – Total Grants \$407,662 – Grant Amount

A More Balanced World Alliance for Prevention & Wellness ALS Association, Connecticut Chapter Alzheimer's Association Connecticut Chapter American Farmland Trust Farmer Relief Fund American Red Cross, Connecticut Chapter Ansonia Public Schools

THIS TOGETHER

Community Investments

Ansonia Rescue Medical Services Area Congregations Together, Inc. BHcare

Boy Scout Troop 3 Derby

Boy Scouts of America Troop 34

Boys & Girls Club of the

Lower Naugatuck Valley

Capri Christian Church

Catholic Academy of Waterbury

Center Stage Theatre Inc.

Clark Memorial Library

New Haven Ecology Project (Common Ground)

Connecticut Burns Care Foundation

Connecticut Forest & Park Association

Connecticut Hospice, Inc.

Cornell College of Agriculture & Life Sciences

Cub Scout Pack 3

Daughters of the American Revolution

Derby Historical Society

The Foundation School

Friends of the Ansonia Nature Center

Girl Scouts of Connecticut Inc.

Greater Valley Chamber of Commerce

Griffin Hospital

Griffin Hospital Development Fund

Housatonic Council, Boy Scouts of America

Junior Achievement of Greater Fairfield County

Lower Naugatuck Valley

Parent Child Resource Center

Master's Table Community Meals Inc.

Mishkan Israel Day Camp

National Right to Work Legal Defense

and Education Foundation, Inc.

Our Daily Bread Food Pantry

Our Lady of Assumption Church

Read to Grow

Recreation Camp Inc.

Ronald McDonald House of CT, Inc.

Yale New Haven Hospital

Saint Raphael Campus

Salvation Army, Greater Valley Corps

Seven Angels Theatre

Seymour High School

Seymour Oxford Rotary Club

Seymour Pink, Inc.

Shelburne Farms

Shelton Economic Development Corporation

Shelton High School

Shelton Historical Society, Inc.

Shelton Public Schools

St. Vincent de Paul of the Valley

Sweaters and Sustenance, Inc.

TEAM, Inc.

University of Connecticut Foundation, Inc.

University of Nebraska Foundation

University of New Haven

University of New Hampshire

Valley YMCA

Working Lands Alliance

Yale New Haven Hospital

Designated Grants and

Organizational Fund Transfers
Designated Funds are established by a
donor(s) to benefit one or more specific

nonprofit(s). In addition, VCF manages the endowment and reserve funds of several local nonprofit organizations.

Designated Grants and Organizational Fund Transfers

65 Funds

\$13,859,138 – Total Assets 54 – Total Grants \$331,922 – Grant Amount

Ansonia Public Schools

Ansonia Rotary Club

Assumption Church

Boys & Girls Club of the

Lower Naugatuck Valley

Center Stage Theatre, Inc.

Central Connecticut Coast YMCA

City of Derby

Connecticut Agricultural Experiment Station

Derby Neck Library

Derby Public Library

Greater Valley Chamber of Commerce

Griffin Health Services, Inc.

Housatonic Council, Boy Scouts of America

Lower Naugatuck Valley

Parent Child Resource Center

Massaro Community Farm, Inc.

Oak Cliff Cemetery Association

Our Lady Queen of the Apostles Parish

Oxford High School

GLOBAL PANDEMIC

Community Investments

Planetree, a Subsidiary of Griffin Health Services, Inc. Plumb Memorial Library Recreation Camp Inc. Seymour Oxford Food Bank Seymour Oxford Rotary Club Seymour Pink, Inc. Shelton High School Shelton Historical Society, Inc. Shelton Public Schools Storm Engine Company Ambulance Corps, Inc. Rowland R. Strong & Edith H. Strong Memorial Scholarship Fund TEAM, Inc. Town of Seymour Trinity Cemetery Association Trinity Episcopal Church Valley United Way Valley YMCA Woodbridge Town Library

Scholarships

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

Scholarships 72 Funds

\$3,109,021 – Total Assets 87 – Total Grants \$172,690 – Grant Amount

Academy of Our Lady of Mercy, Lauralton Hall American International College Amity Regional High School Ansonia High School Assumption School Boys & Girls Club of the Lower Naugatuck Valley Bunnell High School Central Connecticut State University
Derby High School
Emmett O'Brien Regional Technical School
Fairfield University
Hamden High School
Oxford High School
Rensselaer Polytechnic Institute
Sacred Heart University
Seymour High School
Shelton High School
University of Connecticut
University of Delaware
University of New Haven
University of Vermont
West Haven High School

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

Unrestricted & Preference
14 Funds

\$3,329,884 – Total Assets 22 – Total Grants \$131,698 – Grant Amount

Area Congregations Together, Inc.
BHcare
Boys & Girls Club of the Lower Naugatuck Valley
Catholic Charities Archdiocese of Hartford
Christ Episcopal Church
Connecticut Hospice, Inc.
Derby Historical Society
Junior Achievement of Greater Fairfield County
Rape Crisis Center of Milford, Inc.

Regional Data Cooperative (Data Haven)

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Mission Related Investment Committee

Alan Tyma, Chair Aleta Miner Ray Oppel Don Smith, Jr. Diane Stroman

*Passed away during 2020



Outgoing Board Member

Patricia Tarasovic

VCF thanks outgoing **Board Member** Alan Tyma



In Memoriam 2020

The VCF Board and Staff reflect on the passing of Board member, James Hodge, Jr. In addition to his service on the VCF Board, he was actively involved in the Valley and took tremendous strides to improve the quality of life in the region.

Partners in Philanthropy

The Valley Community Foundation (VCF) partners with The Community Foundation for Greater New Haven (TCF) to carry-out its mission in Ansonia, Derby, Oxford, Seymour and Shelton. This relationship provides VCF with access to the strength of TCF, which was established in 1928 and is one of the oldest and largest community foundations in the United States and remains the largest grantmaker to nonprofits serving a twenty-town region in the heart of central Connecticut. VCF shares a CFO and uses TCF's investment expertise, programming and development knowledge. This strong relationship provides VCF with an immediate support structure that allows its Board of Directors to focus on leadership and development.

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

