



It takes The Valley...

VALLEY COMMUNITY FOUNDATION
ANNUAL REPORT 2019

Valley Community Foundation A YEAR IN REVIEW

INDEX

- 2-3 Valley Community Foundation
A Year in Review
- 4-5 2019 Valley Community Index
- 6 The Gates Society
- 7 The Great Give® 2019
- 8-21 Valley Community Foundation Funds
- 22-24 Valley Community Foundation
Supporters, Contributors and Funders
- 25-31 Community Investments
- 32 Stewardship of Charitable Assets
- 33 Fiscal 2019 in Review
- 34 2019 Councils, Committees
and Volunteers
- 35 Your Impact, Made Easy
Establishing a Fund at VCF

CONTRIBUTIONS
\$2,203,963

GRANTS AWARDED
\$1,717,941

NEW FUNDS
13

LEADERSHIP



2020 VCF Board Chair, Donald Smith, Jr., VCF President & CEO, Sharon Closius, and 2019 VCF Board Chair, Lynne Bassett Perry

2020 VCF BOARD AND STAFF



Front Row Left to Right - Sharon Closius, Aleta Miner, Beth Colette, Thomas Sutnik, Alan Tyma, Jack Walsh ~ Back Row Left to Right - John Ready, Valerie Knight-Di Gangi, Nancy Valentine, Ray Oppel, Terry Jones, Donald Smith, Jr. ~ Not Pictured - Wendy Gamba, James Hodge, Jr., Jennifer Magri, Fred Ortoli, Angela Powers, Marianne Smythe, Diane Stroman

Valley Community Foundation A YEAR IN REVIEW

Dear Friends,

If you have ever gazed into a kaleidoscope turning in the light you can easily find yourself captivated by the small pieces of glass morphing and changing shape. These colors and illuminated elements, while distinctly different, come together to create something truly beautiful and represent enticing new possibilities.

Much like the eclectic groupings of colorful shapes, the Valley – its neighborhoods, communities, municipalities, and as a whole – represents a range of differences. It is however in our unique ability to come together, prioritize efforts under a common vision, and leverage not only our strengths, but also our resources, to strategically address the needs and opportunities within our community where our pattern merges into something special.

Incredible things happen when we come together. While the differences and commonalities among us change over time, just like those colorful patterns, the compassion and desire to make a difference has always remained as an integral part of this region. That is why we say “It takes The Valley...”

It takes the Valley to achieve ambitious goals. It takes the Valley to strategically focus on priorities that can have a rippling impact across several issue areas. It takes the Valley to share the audacious responsibility for continuous community improvement and vibrant civic engagement. As the patterns in our metaphorical kaleidoscope evolve, we could not be more excited to see the bigger picture coming into focus.

Most notably in 2019, in partnership with Griffin Hospital and DataHaven, we released the 2019 Valley Community Index. Continuing the Valley Community Foundation’s (VCF) ongoing multi-year commitment, this report provides a timely update on data and trends from the 2016 Index. This information is critically important, reflecting the well-being of our

Valley. It will be used to further collaborate on community conversations, align current efforts and investments, and promote strategic endeavors, which will build, sustain, and enhance the quality of life in the Valley.

Work groups comprising more than 40 representatives from dozens of area organizations met over a period of several months to support the work of this regional undertaking. As a result of these many contributions, this Index is a truly community-driven data collection effort, which examines the social, economic, and physical health of the Valley since the previous report three years prior.

In 2019, VCF awarded 49 grants totaling more than \$700,000 from discretionary funds to support this initiative and other responsive needs. It takes the Valley to ensure this region is a strong, vibrant, and informed community both today and for years to come.

After one year as Chair and completing her full term of service on the Board of Directors, Lynne Bassett Perry turns the gavel over to Donald Smith, Jr. whose Chairmanship will take place during 2020. During her tenure on the Board, Lynne helped create and refine VCF’s grant program and community impact initiative. She also supported the development and production of two Valley Community Indices. VCF and the nonprofit organizations serving the Valley, as a whole, are in a better position because of her focused grantmaking efforts and commitments.

It takes individuals, families, and organizations making strides to create a legacy for a better tomorrow. It takes a lot of pieces moving together in unison to create measurable outcomes. It takes the Valley...

With sincere regards,

Lynne Bassett Perry & Sharon Closius
Board Chair President & CEO



2019 VALLEY COMMUNITY INDEX

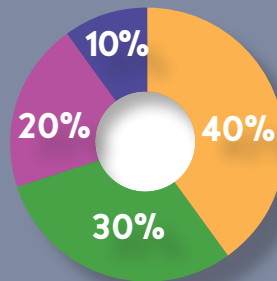
OVERVIEW

Knowledge is a powerful tool and the data is clear. Health and well-being are not simply about genetics, but are impacted by factors both within and beyond one's control. The Valley has a long history of being a close-knit, family-centered region. However, disparities among its communities present both challenges and opportunities to collectively address future health and wellness needs. The findings in the 2019 Valley Community Index provide the information to develop strategies for change.

It truly took the Valley to complete this report. Created in partnership with DataHaven, this document fulfills the Community Health Needs Assessment reporting requirements for both Griffin Health and The Naugatuck Valley Health District. More than 40 community partners, including nonprofits, government representatives, and volunteers regularly met for more than nine months to comb through the information collected by DataHaven to select the key data points for inclusion in the Index. This data will not only be used in grantmaking and planning efforts for the next several years, but also helped to inform stakeholders as they created the design and workflow for the 2019 Community Health Improvement Plan (CHIP), which prioritizes health focus areas for the Valley Region. The conditions that truly shape or have the greatest impact on the health a person experiences throughout their life are known as the social determinants of health. Understanding this information, and which populations are disproportionately impacted, is critical to continuing to improve community health across the Valley.

The Valley is a healthy place to call home, and its residents demonstrate higher levels of self-reported health than peers statewide and nationally. However overall wellness requires not only access to high quality medical services, but also engagement in positive daily behaviors. Existing barriers to achieve and maintain one's overall health and wellness, such as access to reliable transportation, paid medical leave, education, sustainable and healthy food options, and adequate childcare can have long lasting effects throughout one's life.

Social Determinants of Health



40% socioeconomic factors such as income, education, and a support network

30% health behaviors such as diet and exercise or substance abuse

20% health care such as access to and quality of health care

10% physical environment such as where you live and work

This report reflects the most recent data collection efforts to examine the social, economic, and physical health of those living and working in Ansonia, Beacon Falls, Derby, Naugatuck, Oxford, Seymour, Shelton, and updates the 2016 Community Index benchmark data with new information. After reviewing the data in both the 2016 and 2019 indices, we have identified two trends that are already impacting the Valley now: socioeconomic disparity and the anticipated growth in our senior population.

SOCIOECONOMIC DISPARITY

The Valley's diverse economic, educational, cultural, and health-related assets present opportunities to improve the quality of life for its residents. Though the Valley's median income is above the statewide average, there are disparities between towns, and the poverty and low-income rates are on the rise across the region—particularly among families with children. Between 2000 and 2017, the Valley's low-income rate grew from 15 to 21%.



Attendees view the unveiling of the 2019 Valley Community Index and listen to subject matter experts discuss the changing needs and opportunities in the region.

2019 VALLEY COMMUNITY INDEX

Valley public school districts overall have experienced an uptick in academic performance and high school graduation rates, and are performing ahead of the state on both metrics. However, the number of students from economically challenged households is growing. The number of students eligible for free and reduced price meals has increased to 48% overall in the Valley, and in some areas, is as high as 72%.

Job opportunities in the Valley are shifting towards the service sector and wages for these industries have been stagnant or declining since the early 2000s. A strong local economy and diverse, accessible regional economic growth for residents are crucial for individual and community-wide economic security, as well as overall well-being. Since just 23% of Valley residents are employed within the 7-town region, access to reliable transportation is critical.

VALLEY SENIORS

With their deep roots in the Valley, seniors are assets to community life and serve as a rich source of community history. Seniors are also an integral piece of the Valley's economy and social fabric, but the growth of this population segment presents challenges that the region must be prepared to address.

Older adults are remaining in the workforce longer. Among the reasons for continued labor force participation among seniors are the need to keep working for financial reasons and the ability to keep working due to increased lifespan. Senior workers are an asset to regional economies,



Across the country, the senior population is growing. Between 2015 and 2035, the Valley's senior population is projected to increase by 39%—nearly twice as fast the statewide rate.

increasing tax revenue, stimulating growth through consumer spending, and providing additional talent and expertise.

There are unique issues seniors face related to housing, transportation, healthcare, and social engagement. The future of the Valley depends in part on anticipating and addressing seniors' changing needs and lifestyles.

WHAT IS BEING DONE NOW?

Griffin Health and the Naugatuck Valley Health District are continuing a longstanding tradition of working together to identify and address concerns. The three priority areas identified for the 2019-2021 CHIP are heart disease, maternal-child health, and behavioral health. To learn more and for more up to date information regarding health and well-being in the Valley, visit griffinhealth.org, nvhd.org, yalegriffinprc.org, and bhcare.org.

During the development of the 2016 Community Index, we learned that 26% of children lived in low-income households in 2014. By 2017, that number had increased by 2% with some areas in the Valley reaching a total of 60% to 80%. A working group of 27 stakeholders formed the Valley Childhood Poverty Collective Impact group to dig deeper into this issue. The group plans to build strategies to address the root causes and effects of childhood poverty, setting the stage for further investigation into socioeconomic disparities.



30% of children under the age of 5 identify as a member of a racial or ethnic minority

WHAT CAN YOU DO?

- Read the full Community Index.
- Share observations with family, friends, coworkers, community leaders, and public officials.
- Stay informed about key issues affecting our region.
- Help instill the importance of community engagement in all our citizens.
- Become an advocate for change in your local municipality.
- Participate in local and regional community conversations and forums.
- Focus your resources, time, and talents to have the greatest impact for those most in need.

The Gates SOCIETY

The Gates Society is a close circle of friends who share a special love and appreciation for this region, and who have named the Valley Community Foundation (VCF) or one of its funds in their estate plans.

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 so we can personally thank you during your lifetime.

WHY LIZ KENNARD JOINED THE GATES SOCIETY



L to R: Bishop Theodore Brooks, William W. Ginsberg, Jamie Cohen, and Liz Kennard

Liz's involvement with VCF has spanned more than a decade and a half, beginning with her service on the Board of Directors in 2004. After quickly learning more about the organization, its ambitious endeavors, and goals to impact the Valley community for generations to come, Liz established the Mary Fund in 2005.

This donor advised fund was started to honor her grandmothers, Mary L. Powers and Mary J. Kennard; and her mother, Mary P. Kennard, all teachers who understood the value of education and promoted it professionally and personally. Because of the flexibility at VCF, Liz started this as a build-a-fund and consistently made contributions over time. Now, through this fund, she is able to make grant recommendations for nearly \$1,000 each year.

Since her departure from the Board, Liz has chaired the application review committee for VCF's Community Grants, still continues to grow The Mary Fund, and is a living example of connecting philanthropy with the long term good of the Valley.

"I am a firm believer in Community Foundations and their impact within the areas they serve," Liz said. "I, too, wanted to have an impact on my fund and what it can achieve over time, which is why I named the Mary Fund at VCF in my will for a percentage of my estate. Perpetuating my passion for the Valley and the values I learned from the matriarchs of my family is something very close to my heart."

GATES SOCIETY MEMBERS

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
Lynn Ortoli*
Dorothy Palazzi
Lynne Perry
Beth Ann Smith
Donald W. Smith, Sr.*
Brad & Marianne Smythe
Valentina Vitali*
Frederick Stanek
Karen Stanek*
Robert & Eleonora Van Egghen
Marc E. Vincent
Donald E. Warichar
Joseph R. Warichar
Laura & John Zaprzalka

*deceased

What is a Bequest?

A bequest is a revocable gift from a will or personal trust of cash, securities, real estate or other assets. A common form of a bequest is a percentage of one's assets or the residual value of the estate given in your memory or in that of a loved one. You can work with VCF to create a lasting legacy that will benefit the Valley for years to come.

The Great GIVE® 2019

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 year-after-year.

Thanks to approximately 12,000 donors who gave 17,000+ gifts, The Great Give® 2019 generated more than \$1.8 million, including matching funds and prizes from the two foundations and other generous community sponsors for nonprofits serving TCF's 20-town region, which includes VCF's five-town service area. For the seventh consecutive year, VCF has been the second largest sponsor of the event, incentivizing giving by matching funds and offering prizes to participating organizations.

With the help of Valley residents, employees, and VCF donor advised fund holders during The Great Give® 2019 nearly \$296,000 was raised for nonprofit organizations located in Ansonia, Derby, Oxford, Seymour or Shelton. This includes sponsorship support from VCF for \$6,500 in prizes and \$20,000 which was used to match donations from those who live or work in the Valley.



PRIZES

Shelton High School Robotics Team was awarded TCF's prize of \$3,000 for highest number of peer to peer fundraisers and Center Stage received a \$3,000 prize for most money raised. VCF awarded two \$2,000 grand prizes. The first to Valley Independent Sentinel for greatest total number of Valley donors and the second to Ansonia Public Schools for the greatest number of new Valley donors. Ansonia Public Schools also received an additional \$500 Golden Ticket prize. In honor of VCF's 15th anniversary, Griffin Hospital was awarded a \$1,500 prize for generating the most donors during a 15-minute challenge period on Wednesday, May 1st.

The Liberty Bank Foundation sponsored a prize for the Valley-based organization supporting basic needs that attracted the greatest number of individual donors during a specified time, which was presented to Massaro Farm.

BAD SONS Beer Co., located in Derby, raised a total of \$1,341 in prize dollars through a charity tap event that began April 1st, that included support from Derby Mayor, Rich Dziekan, who contributed his tips from guest bartending. This prize money was awarded to Friends of the Ansonia Nature Center.

Other Valley-based prize winners included Derby Historical Society, Center Stage, St. Mary-St. Michael School, Area Congregations Together, Master's Table, Valley Shakespeare, and Shelton Land Conservation Trust.

Valley Community Foundation 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 2019, 13 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.

“I remember how much they loved this community and, because of them, I genuinely appreciate how important it is to volunteer and give back”

“I asked my accountant for more information, and she explained how we could put aside charitable dollars from the sale of the company and then allocate donations every year out to the charities of our choice”

“We can’t think of a better way to mark our 100-year anniversary and celebrate scouting in the Valley.”

Valley Community Foundation FUNDS

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.

Frank and Ann Conroy Fund for the Joy of Music



Theresa Conroy first became familiar with the Valley Community Foundation (VCF) during her tenure as state representative. “That’s when I found out what having a permanent endowment like the Foundation does for the community,” Theresa said.

When Frank and Ann Conroy passed away within 100 days of each other during 2019,

Theresa approached the staff at VCF to discuss a way to honor and memorialize her parents. “They made it so easy for me when I decided what I wanted the fund to do. My mother was also aware of my intent to establish this fund before she passed and was happy with my decision.”

With the understanding of VCF, combined with knowing what was important to her parents Theresa was inspired to create the Frank and Ann Conroy Fund for the Joy of Music. “My mother came from an orphanage and always said that if she won the lottery, she would set up a fund to benefit children,” Theresa said. “She felt that music could make such a difference in a child’s life.”

Given her parents’ level of involvement in the Seymour community, Theresa felt there would be no better way to honor their memory than to establish a fund to support music and Seymour! Through this fund, she hopes to support activities such as the school music program to provide necessary tools for students, such as recorders or sheet music. As well as the Town’s summer concert series, a favorite of her mom and dad.

“My father was a former first selectman and belonged to many organizations. I could have chosen from any of those groups, but I knew how much music meant to both him and my mother. They recognized that arts programs quickly become at-risk when budgets need to be cut. It is important for this fund to support the school system in order to ensure these valuable programs remain available throughout the district.”

She added, “I remember how much they loved this community and, because of them, I genuinely appreciate how important it is to volunteer and give back. I encourage anyone who is thinking about a fund to reach out to VCF President and CEO Sharon Closius and find out how you, too, can create a fund and impact so many lives.” ✨

Stengel Family Fund



The Valley Community Foundation and the idea of establishing a fund were new concepts to Art Stengel and his family. Nevertheless, the Stengel family took a leap of faith and entrusted VCF with a sizeable fund, which will now impact the community for generations to come.

“When I was selling my business, I was talking with a friend who had done the same,” said Art. “He pointed out that there are tax advantages to making a large donation to a donor advised fund where you could receive the full tax deduction,

Valley Community Foundation FUNDS

especially with the new tax reform.” As they talked further, Art recognized that although this particular funding vehicle was unfamiliar to him, the ability to donate to causes that were important was simply a natural extension of his family’s long-standing habit of supporting nonprofit organizations.

“I asked my accountant for more information, and she explained how we could put aside charitable dollars from the sale of the company and then allocate donations every year out to the charities of our choice,” Art said. “Right now, my wife and I will decide where this money will be distributed. When we’re gone, we named our children, Kevin and

Kylie, as the successor advisors who make those decisions on behalf of our family. It is a win-win for all involved. As a result, we could accomplish what we wanted to do, while also receiving benefits like a less onerous tax reporting process each year. I was happy that VCF became such a good fit for us.”

Although he grew up in Huntington, the Stengel family’s outreach will extend well past Shelton and the Valley to organizations that have impacted them in some way. Art said, “The way Sharon described the fund, there are no restrictions and we can support any recognized 501C3 in the United States that we choose.”

Art met with VCF President and CEO Sharon Closius to learn how VCF would manage the money. He especially appreciated the foundation’s investment strategy and the fund’s potential to grow over time. He added, “Sharon was great, explaining how the fund would work and how easy it would be to add to it in the future. The fact that VCF is located here in the Valley made it easy for me to visit in person, and helped add to my confidence in its work. I look forward to seeing this process through to when we actually make those grants from our fund and realize results in the community now and for years to come.”✱

DONOR ADVISED FUNDS

Kathleen and Mariano Adamo
Community Service Fund
John and Paraskeve Vartelas ‘AGAPE’ Fund
Alesevich Family Fund
Bassett Family Fund
Monty Blakeman Fund
Champagne Family Fund
Cohen Community Advised Fund
Cohen-DeToro Charitable Fund
Jane 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
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
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

*New Fund in 2019

Valley Community Foundation FUNDS

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.



Youth in the lower Naugatuck Valley will be able to enjoy scouting programs and camaraderie in perpetuity thanks to the newly established 1920 Society Fund, a legacy fund that has been established in celebration of the Boy Scouts of America, Housatonic Council's 100th year serving the region.

John A. Zseller II, Scout Executive with the Housatonic Council, explained that the Housatonic Council's Board of Directors has been working with Valley Community Foundation (VCF) to establish a fund to receive legacy gifts that will benefit scouting in the Valley in perpetuity.

"We are aware of the BSA consolidating councils to better serve youth and we want to make sure that this Fund will benefit the Housatonic Council or Valley scouting in the future," John said.

Scouting is an important part of Valley history. The Housatonic Council boasts over 2,000 Eagle Scouts in its 100-year history! Scouting has helped form many of the Valley's leaders, both yesterday and today.

"We know that some of our scout alumni have not made a bequest or financial commitment to the Council, unsure of what would happen to their gift in the case of a consolidation or merger," said Gary Parker, Board Chairman of the Council Board of Directors. "That is why we set up this fund with specific instructions that should anything happen to the Council that the distribution from the fund will go only to benefit scouting in the Valley. Our hope is that this will reduce any concerns and people will consider making a legacy gift directly to this fund at VCF."

"Our experience with VCF has been great. We know that the funds are well-managed and they have the expertise to accept different types of assets and can help us and our donors with planned giving vehicles," John added.

Approximately 1,000 youth and adults took part in scouting programs during 2019, providing more than 5,000 hours of service to the community by collecting items for local food pantries, planning and completing Eagle Scout projects, marching in parades,

and more. "Our organization is about so much more than just camping and the outdoors. We want to make sure that scouting is available for future generations in the Valley," John said. "We can't think of a better way to mark our 100-year anniversary and celebrate scouting in the Valley." ✨



The D'Addario family first established a fund with the Valley Community Foundation in 2008 and, since then, have enjoyed watching it grow and make a difference in the Valley. Thomas (Tom) D'Addario explained, "We chose to create a donor advised fund more than a decade ago because we enjoyed making grant recommendations for how our money will be invested into the community and we liked that we would support the Valley in perpetuity through this fund."

Valley Community Foundation FUNDS

More recently, the family decided to do more. “My father started our family business 52 years ago in Ansonia. We later moved the D’Addario Auto Group to Shelton in 1970. Our business has seen both good and bad times over the past half century. Once we reached our golden anniversary, however, we decided it was time to contribute even more to the community that has stood by us all this time. It made sense to create another fund because we not only saw the benefits from our family fund, but we also saw a local need and we wanted to help.”

Tom, his wife Mary, and three children Dr. Thomas D’Addario, Daniel D’Addario, and Dr. Sara D’Addario agreed that Griffin Hospital would serve as a great choice for this designated fund based on how well the facility cares for community members. “We set a goal to collectively grow this new fund to \$50,000 to help support Griffin Hospital’s most pressing needs, and we are just about there.”

He added, “Our experience with VCF has been seamless. Once we decided to start this fund and connect with the Valley in this way, there were just a few simple questions to answer, such as the amount we wanted to contribute and how that money should be used. VCF will now manage the fund and Griffin Health will determine where they see the most pressing need and how they will use the annual distribution from the fund.” Tom emphasized how the project was a family endeavor. “If any family is thinking about doing this, I’d recommend getting everyone together to talk about how to continue their

legacy. My wife and I, along with our children, have been on the same page right from the beginning with this effort. For us especially, this is important because the people in the Valley are why we are in business today and are still part of this wonderful community.” ✿

Harvey and Gerry Eckhardt Fund for the Seymour Oxford Food Bank



Many caring people set up funds with Valley Community Foundation in order to address a specific need in the community. Some even have the passion to establish multiple funds. In 2016, Harvey and Gerry Eckhardt started one such fund to benefit the Woodbridge Public Library. Over the past two years, this fund has been successful in

supporting adult cultural and arts programs at the library, enriching the community and helping to attract more patrons.

Shortly after setting up their first fund, Harvey decided to help out at the Seymour/Oxford Food Bank (SOFB). “One of the food bank founders relocated out of state,” Harvey said. “She was friends with Gerry, so I volunteered to take her place and help keep her work going. I was impressed with their operations and saw first-hand how important the food bank was to its clients.”

As Harvey continued to work at the food bank, he and Gerry remembered the positive experience they had with VCF and decided to set up another fund. This time, their generosity will support the SOFB to ensure its sustainability well into the future. “Both the process and results of creating a fund were great the first time we worked with VCF. We were more than happy to go through it once again to help another worthy nonprofit organization,” said Harvey.

The Harvey and Gerry Eckhardt Fund for the Seymour Oxford Food Bank will provide an annual distribution to help purchase nutritionally rich foods and keep the shelves of the food bank stocked on a steady basis, both in the short and long term. “We are pleased to be able to contribute this support, and to help SOFB address issues of hunger and other human needs in Seymour and Oxford.” ✿

Valley Community Foundation FUNDS

DESIGNATED FUNDS

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
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
Torbi-Saldamarco Family 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

*New Fund in 2019

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.

Shelton Land Conservation Trust Fund



The Shelton Land Conservation Trust is a nonprofit organization dedicated to the preservation and protection of open spaces in the City of Shelton. The Trust's members and officers are people who work to save streams, ponds, woodlands, and marshes for native wildlife and for the enjoyment and education of everyone.

"There is something special about the Valley and how everyone has a part to play in making the Valley an attractive place to live and recreate," said Joseph (Joe) Welsh, President of the Shelton Land Conservation Trust. "Being part of the land trust is just one piece in a larger puzzle."

"Being a part of land conservation, our eyes are always set on long-term goals and we work hard to protect our organization," he added. "When it came to our financial assets it was equally important to protect the assets that enable the organization to run."

Board member and Vice President of the Land Trust, Ed McCreery, knew about the work of the Valley Community Foundation (VCF), its ability to hold the assets of non-profits, and have them invested in a \$600 million pool as a result of his affiliation with a number of VCF Board members. "Our assets were getting very little return and I thought it would be a good opportunity to partner with an organization that invests assets for nonprofits so we could have a diversified investment, no matter our size," Ed said.

Members of the Land Trust Board weighed the opportunities against the concerns after VCF President and CEO, Sharon Closius, was invited to make a presentation. "The land trust has been around since 1969 and our primary goal is to protect land long after we're no longer in our current roles." Joe said. We needed to maintain a comfort level with a move like this and talked about accessibility to funds so that we could act on an acquisition, but still perform our stewardship responsibilities on a small budget."

Valley Community Foundation FUNDS

Through this relationship with VCF, the Shelton Land Conservation Trust Fund will grow the principal through investments and donors now have the ability to help increase the fund through cash and non-traditional gifts such as securities, real estate, and bequests. “Donors see our relationship with VCF and know that the money is in safe hands and well-managed. They can be reassured that the land trust, through this fund, is a good steward of the funds that have been entrusted to us.”

Joe added, “We hope everyone thinks about this as an opportunity to be part of something bigger. My colleagues and I want the Shelton Land Conservation Trust to be here to take care of our 370 acres and provide a chance for folks to venture into nature, as well as provide a habitat for wildlife, for generations to come.” ✨



Since 1990, St. Vincent de Paul of the Valley, (SVDP) through its volunteers, members, and programs, has been aiding the working poor, physically handicapped, homeless, and mentally challenged. Its thrift shop offers the dual purpose of providing a low-cost shopping alternative as well as generating income to purchase staples, such as meat, eggs, and produce for its food bank to have on hand all the time.

Knowing how important it is to make sure SVDP is sustainable for its clients both in the short and long term, SVDP Board and Staff

explored various financial options to meet their needs and found a great fit with the Valley Community Foundation (VCF). “We have worked with VCF throughout the years on a number of different projects,” said SVDP Executive Director Remy Kocurek. “We wanted to establish a fund with an organization that shared our goals and values. VCF is local, helpful, and fully immersed in the Valley Community. It was our logical choice.”

Organization funds such as this are offered as a service to nonprofits in the region wishing to participate in VCF’s long-term endowment investment strategy through its affiliation agreement with the Community Foundation for Greater New Haven. “VCF President and CEO Sharon Closius made it clear to us that past performance does not guarantee future success,” Remy said. “However, we see this Fund as being one more strategy to help us accomplish our goals.”

Remy added, “Building and maintaining well-being is a lifelong process. There are times in everyone’s lives when storms and squalls can take their toll on us, both physically and emotionally. We can potentially use the resources from this fund to ensure that we remain fortified, no matter what challenges the future holds, to help Valley residents in need for years to come.” ✨

“We wanted to establish a fund with an organization that shared our goals and values. VCF is local, helpful, and fully immersed in the Valley Community. It was our logical choice.”

Valley Community Foundation FUNDS

Oxford Land Trust Fund



While some funds are established to honor the past, the Oxford Land Trust Fund was set up to plan for the future.

Margaret (Margy) Elliott, President and Corporate Secretary for the Oxford Land Trust, explained that the Board of Directors became familiar with the work of Valley Community Foundation (VCF) through Attorney Fred Stanek. Fred was instrumental in guiding the legal formation of the land trust in 1988 and continues to support the land trust's mission by the donation of his time and legal expertise.

"Fred encouraged us to apply for grants, which we received and used to fund activities such as our 5K Run/Walk at Rockhouse Hill Sanctuary," Margy said. "Revenue resulting from these VCF-supported, fund-raising events strengthened the land trust's ability to continue offering important annual programs. Specifically, a

program like our almost 20-year tradition of the Second-grade Hike that introduces young children, along with their parents and grandparents, to nature and the work of the land trust."

The Oxford Land Trust, however, needed a long-term approach to ensure its sustainability and cover expenses such as the insurance necessary to keep approximately 200 acres of open space available to the public for passive recreation. "We knew we needed to do something dramatically different. Because of Fred's introduction to VCF and our grant experience with VCF, we were impressed with VCF's work with nonprofit organizations and its focus on assisting the Valley community; as a result, we looked no further when deciding where to invest our fund," said Margy.

Margy credits VCF President and CEO, Sharon Closius, with a conscientious approach. "Sharon made herself readily available and, when not all of our board members were able to attend the first meeting, she returned to ensure everyone on the board had the information we needed. She took the time to answer all of our questions and I'd say the process could not have gone any better."

"Our hope is that others who share in the mission of the Land Trust will consider joining in our efforts. People may not have the land to donate, but they may be able to contribute so that people who live in and visit the Town of Oxford will be able to enjoy clean air and water as they reconnect with nature, and that the Oxford Land Trust will be able to pursue its goals of finding, preserving, and maintaining parcels as open space, in perpetuity, both now and in the future." ❀

ORGANIZATION AND FIDUCIARY FUNDS

Anonymous
Birmingham Foundation Fund
Derby Community Endowment 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
Ritchie Fund for Plumb Memorial Library
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 & Friends Fund
Valley United Way Fund
Valley YMCA Endowment Fund
Peter J. Vartelas Invest In Youth Fund
#1 for the Valley YMCA
Veterans of Foreign Wars Post 597 Fund
Women in Networking Fund

*New Fund in 2019

Valley Community Foundation FUNDS

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.



Assunta (Sue) Michaud enjoys sharing stories about her petite, but fiery mother, Rosa Dell'Oso. "My father and I learned about the Valley Community Foundation (VCF) after speaking with the staff at the Edward F. Adzima Funeral Home following my mother's passing. We shared a

dream of creating a scholarship in her memory and realized how simple the process is. Beforehand, I had no idea about VCF or how to start a fund. The more I read through the materials, the more I realized that this dream would become a reality, and was a wonderful way to honor my mother."

Sue reached out to the VCF staff to get the process started. "Everyone there was fabulous," she said. "They did all the work and made everything easy for us, even spending the time to listen to my father's stories about my mother when we went to the office. The hardest part of the process was finding the right picture of my mother to put into the paperwork."

The scholarship was established in time for Sue to include a reference in her mother's obituary, announcing that the fund would support two graduating high school students who had attended Oxford Middle School.

Although Rosa received a limited amount of schooling herself, she was a hard worker who valued education. Her role as custodian at Great Oak Middle School in Oxford was her favorite of all the jobs she ever held. "She loved the students, parents, and teachers as much as they loved her. That's where her heart was," Sue said. "My Aunt, Amelia DiVincenzo, was emotional when she told me that my mother would have been so happy that we have established this fund to keep her legacy alive."

The scholarship will be awarded to one male and one female student, and the family would like the recipients to possess characteristics

that defined Rosa, including both her kindness and grit. "My mother always talked about the students who were kind to her, so we want to use this fund to help someone who shows that same kindness to others. She was only 4' 10 but she was a spitfire," Sue added. "All you had to do was follow the Italian music to find where she was in the school. Her cleaning abilities were unparalleled because she took such pride in her work."

Sue remembers her mother as someone who always gave her all and never gave in. "Part of me wishes we set up the fund during her lifetime but this scholarship is a beautiful way to honor her both now and in perpetuity," she said. ✨

"My mother always talked about the students who were kind to her, so we want to use this fund to help someone who shows that same kindness to others."

Valley Community Foundation FUNDS

Peter S. Goumas Presidential Scholarship Fund



The Goumas family originally established the Peter S. Goumas Presidential Scholarship award in the early 1970's, after Peter, the oldest of six children and a member of the Ansonia Class of 1969, passed away. His father, Peter Goumas contributed \$100 every year to the award in order to support the president of the graduating class at Ansonia High School.

This year, Peter's three brothers formally recognized the opportunities that the six Goumas children had received as members of the Ansonia community and as students of the high school in particular. They acted to ensure the scholarship award started by their

father would be endowed in perpetuity. Peter's brother, Mark Goumas, said, "My father went to Ansonia High School and Peter led the way for us. All of us were like him - athletes and involved in school activities. We thought it was important to continue what my father had started, to serve the school that served us so well and to also remember Peter."

He became aware of the Valley Community Foundation (VCF) and its ability to manage funds when the school asked the Foundation to manage Peter's original scholarship award. "VCF's Donor Services Associate, Beth Colette, suggested a way my brothers and I could enhance what my father had started and create an endowed scholarship fund."

Mark and the family like how VCF represents the Valley community, as well as what he called a seamless setup process. "I could use payroll deductions to contribute and direct those funds right into the scholarship fund. I have done payroll deductions for decades but now with a different purpose."

The paperwork to set up the fund with his brothers Dr. Douglas Goumas and Attorney Gregg Goumas was almost effortless. "I'm the only sibling who remains in the area so it was gratifying when we signed the agreement when we were all together, at the rehearsal dinner for my daughter's wedding. It was that easy," said Mark.

"Our father owned a grocery store in the north end of Ansonia and people remember him and our mother for what they did for the community. The Valley culture is very

industrious and hard working. Although this Fund is named specifically for Peter, it reflects what the brothers and their remaining sister, Christine Seymour, learned from their parents. As a family we are glad to give back with sincere gratitude for what we've received from our community." ✨

Joey's Way Fund



Joey's Way Fund was established by Joseph and Christine (Joe and Chris) Lesko in memory of their late son, Joseph (Joey) James Lesko, and will support students pursuing a career in the trades, much like Joey had done.

Joe said, "A year or so after we lost Joey, we wondered if there was something we could do to honor his legacy. We sat down and had a conversation with our attorney, who had also lost his wife earlier in the year. He

Valley Community Foundation FUNDS

listened to what we wanted to do and referred us to the Valley Community Foundation (VCF). Shortly thereafter we met with Sharon, VCF's President and CEO, who helped us understand our options for creating a fund."

Joey had a range of talents. He was able to work with anything – from wood to engines to food – to create something amazing. "Our son's talents were on the technical side of everything," Joe said. "He attended Emmett O'Brien Technical High School in Ansonia to study automotive technology and culinary arts before attending Baran Institute of Technology for auto body collision and repair. He enjoyed the trades, where I, myself, have worked. After we learned about how there is such a need for highly trained people in these fields, we couldn't think of a better way to help other Emmett O'Brien students with similar skillsets as Joey and do so in his memory."

Chris added, "There are so many expenses for these young people. They need to purchase tools and uniforms, as well as other materials related to their area of focus. We know from personal experience that every little bit of support helps." While students must demonstrate academic achievement, the Lesko family placed a priority on passion and talent as the determining criteria for selecting those who will benefit from this fund.

Joe explained, "Joey also enjoyed drawing and painting. His creative abilities and interest in cars were a perfect blend of two passions.

Because of his talents, Joey was able to decorate vehicle bodies freehand and ended up working at Sikorsky for a short time where he helped paint helicopters. Joey had such a promising life ahead of him that ended much too soon."

The Lesko family is looking forward to helping technical students, like Joey, share their skills with the community and build successful futures. Joe and Chris hope to grow this fund and its impact over time. Joe said, "Our hope is that, through this fund, we can provide a break to students in need or maybe help them make a decision about their endeavors. It's important to make the right choices in life and in Joey's memory we want to help as much as possible." ❀

"Our hope is that, through this fund, we can provide a break to students in need or maybe help them make a decision about their endeavors."



Beginning in 2020, a young woman graduating from Shelton High School will reach forward to accept an award from John Pawlowski, his son Chris, and daughter Lauren for the Pam Petro Pawlowski STEM Scholarship Fund. As the young woman accepts that award, she will learn about the extraordinary and inspirational woman that John, Chris, and Lauren want to memorialize.

John and Pam had been good friends of the Valley Community Foundation (VCF) since the VCF took over the management of a scholarship fund to honor his mother, Lillian Pawlowski, a school teacher of 30 years at Elizabeth Shelton Elementary School in

Valley Community Foundation FUNDS

Shelton. Then, in 2018, a fund was established in honor of Pam's mother, Ann Petro, a former principal at Sunnyside Elementary School in Shelton.

When Pam suddenly passed in October 2019, her family reflected on her passion for advocating for Science, Technology, Engineering, and Math (STEM) education for Shelton Intermediate and Shelton High School students and mentoring young engineers. Inspired by Pam's passion, her family set up another fund, in her memory, to support Shelton female graduates pursuing STEM in higher education.

Pam graduated from UConn with a degree in chemical engineering and was a process engineer at Unilever where she designed and made consumer products. John recalled how her hands-on approach and problem solving skills made her highly respected by her colleagues. Her blend of creative thinking and caring for others resulted in focused and meaningful changes for the community. "Pam promoted Hand Washing Day at Perry Hill School, volunteered at Shelton Intermediate School to talk about science careers, judged the Shelton High School science fairs, and distributed Unilever products to nonprofits in need, all without skipping a beat," he said. She balanced all of this while being a wonderful wife and mother.

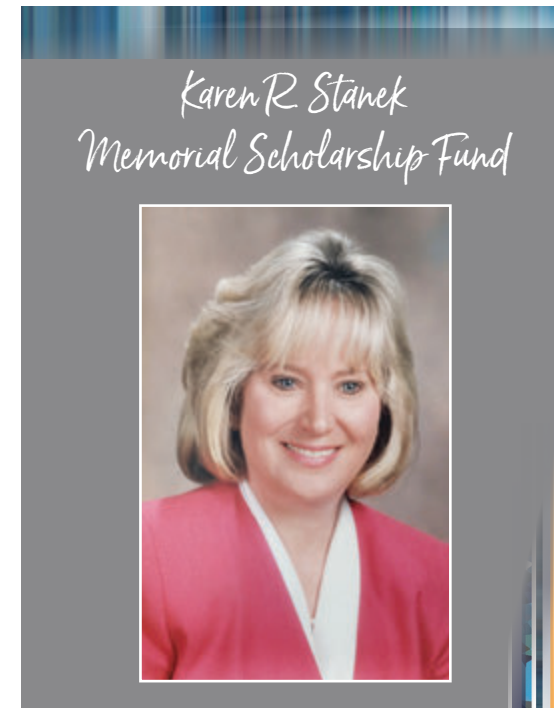
Pam spent 15 years as a founding member of the Commodore Hull Thanksgiving 5K Road Race Committee, which benefits the Boys & Girls Club of the Lower Naugatuck Valley. She also served on the Spooner House Board

and the Advisory Board for Griffin Hospital. Pam additionally advocated for students as a member of the UConn Engineering Advisory Board.

As a testament to the contributions Pam made to her community, the race committee permanently dedicated the finish line in her name. Unilever also named an annual internal award after Pam and she was the first recipient, that acknowledges her volunteer spirit by recognizing the same generosity in someone who supports the community in the area of STEM.

The family has been joined by hundreds of others in the Valley and beyond to support the fund created in Pam's memory. John noted, "We're still getting donations and are so impressed by the generosity of the community. VCF made it possible to not only set up this fund, but for donors to give online, which has been tremendously helpful for people who live remotely. The staff also notifies us when donations are made to the fund so we can send a personal message in addition to VCF's acknowledgement."

John is looking forward to being present alongside his children when the scholarships in memory of Pam, Lillian, and Ann are awarded to graduating Shelton High School students. "This is an excellent way to honor these three extraordinary women – and to ensure that their commitment and contribution to the community they loved, will live on forever." ❀



Karen R. Stanek's connection with the Valley was impactful and deeply rooted, especially her work with students. When she passed away in March of 2019, her husband, Fred, established the Karen R. Stanek Memorial Scholarship Fund to memorialize her contributions to the Community and continue her passionate support of Seymour High School students.

A graduate of Seymour High School, Karen returned there to teach Social Studies for 35 years, including history, government and law courses. She received the Seymour High School Distinguished Alumnus Award during the 2016 graduation ceremony and the David

Valley Community Foundation FUNDS

A. Brumer Excellence in Education Award in 2002. She was also awarded the Vincentena Kobasa Excellence in Teaching Award posthumously in 2019.

Fred said, “She was very dedicated to the school and embodied the phrase, ‘Once a Wildcat, Always a Wildcat.’ She loved her students and wanted to see them advance as did I and our children, Courtenay Fisher, David, and Patrick. We were each certain that this Fund would be the appropriate way to honor her legacy.”

Eulogizing her mother, Courtenay recalled, “As my brother David so aptly said, if Mom ever taught you in a class, coached you on a mock trial team, worked with you on Student Council, or helped you in one of the countless other things she was involved in, you were treated like her own child, and she loved you.”

Given that Karen taught Social Studies and that Fred and two of their children are attorneys and a third child is a member of law enforcement, the Family decided the Fund should support students who want to teach Social Studies or enter the field of law. Fred continued, “She was very proud of her role as advisor to the High School Mock Trial Team. She led them to state championships, which they won in 1982 and 1983.”

Karen was elected to four terms as a Selectman in Seymour to serve her Community. She also gave her time to the Board of Ethics, Board of Education, Seymour Parade Committee, and Commission on Aging.

Karen always encouraged her students to become involved in their Community. Fred admired the way Karen always said she wanted to show her students that she meant what she taught them over the years.

She also served on the Valley Community Foundation (VCF) Board of Directors and, as such, Fred knew exactly what to do in order to establish a fund. “Karen and I both recognized the importance of giving back to the Community and I had assisted clients with this process before. It was very easy to set up the fund and will serve as a great way to perpetuate her love for Seymour.”

As a result of how the Fund was established, the Community has been able to express appreciation for Karen’s presence in the Valley. Fred added, “She touched a lot of people during her lifetime, in so many different ways. More than 100 people contributed to this Fund in Karen’s memory after her passing. My children and I are so touched by the Community’s affection for Karen and support for the Fund! ✨

“We were each certain that this Fund would be the appropriate way to honor her legacy.”

SCHOLARSHIP FUNDS

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 Battaglini Memorial Fund
Stella Behuniak Fund
John F. Blake, Jr. Memorial Prize
Rachel and William Brogadir Scholarship Fund
Stanley and Irene Chlebowsky Memorial Scholarship Fund
Stephen & 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
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*
Winifred Bennett Kerins Memorial Prize
Patricia M. Kondrath Scholarship Fund
Russell & Joanne Kiley Kulawiz Fund

Valley Community Foundation FUNDS

Frank J. Lang Fund
Jesse McCord Lewis Memorial Scholarship Fund
Michael R. McMahon 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

*New Fund in 2019

PREFERENCE FUNDS

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

PREFERENCE FUNDS

Ancient Order of Hibernians,
Derby Division Fund
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

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.

UNRESTRICTED FUNDS

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

"We're still getting donations and are so impressed by the generosity of the community. VCF made it possible to not only set up this fund, but for donors to give online, which has been tremendously helpful for people who live remotely."

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- American Legion, Emil Senger Post 10
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- Robert & Susan Anderson
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- Ansonia Public Schools
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Stanley & Phyllis Jachimowski
Andrea Jones
Jones Family Farms, LLC
Richard & Diane Joy
George & Barbara Junko
Christopher
& Cynthia Jurzynski
Richard & Mary Jurzynski
Frederic Kaeser
William & Susanne Karcher
Megan Keenan
Cathleen Kellett
Joel & Helen Kelly
Joseph & Anna Kemc
M. Elizabeth Kennard
Charles Ketz
Craig Kilian
Sandra Kmec
Jason Kneen
& Dana Jeanette Kneen
Remy Kocurek
Susan Kolowski
Paul Kondrath
Paul Konwerski
Peter Konwerski & Leah Rosen
Richard & Deidra Kopec
Lewis & Sharon
Korman Foundation
Carol Koskelowski
George & Susan Krupa
Erich & Susan Kunst
George & Camille Kurtyka
Michael & Vivian LaChance
Leann LaConte Rua
Michele LaCrosse
Edward & Laura Lane
James Lane & Jennifer Tarozzi
Michael & Nancy Laneuville

Robert Lang
Carl & Stephanie Langerman
Thomas & Mary Lapaglia
Susan Lebel-Warner
Michele Leblanc
David & Patricia Legassie
Calli Legen
Domenico
& Antoinette Lemma
Joan Lenzi
Joseph & Christine Lesko
Rob & Loretta Lesko
Arlene Levine
Paul & Celesta Ligniti
Thomas & Carol
Loughman, Sr.
Patrick & Caroline Lydon
Cathleen Lynch
Jean Lynch
Lisa Lynch
William & Judi Lynch
Gretchen Magel
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Barbara Majeski
Joseph & Ruth Majoros
Rick & Fabio Mangione
Sharon Manley-Brenton
Dennis Mar
David & Patricia Martin
Susan Martin
Ursula Martino
Brenda Marucci
James Mas III
Massaro Community Farm, Inc.
Vincent & Anna Mate
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Sean & Molly McDonald
Michael & Georgette McFarland

Karen McIntyre
Michael & Monica McMahon
Thomas & Maryann McMahon
Michael & Deborah McNeil
Tom & Val Medve
Bernice Melson
Christian & Barbara Mendes
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MaryAnn Meyer
Assunta Michaud
Raymond & Marilyn Michaud
Laurie Miller
Miller-Ward Funeral Home, LLC
Aleta Miner
Robert & Margie Mingrove
Ronald Moffatt
Jeffrey & Grace Monahan
Sandra Montanaro
Gary & Sara Morgatto
Robert & Patricia Nash
Raymond Necio
Nancy & Peter Nelson
Beth Nesteriak
Diane Netto
Network For Good
Donald & Jane Nevinger
Newtown-Sandy Hook
Community Foundation, Inc.
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Elizabeth Nicoletti
William & Elizabeth Nicoletti
William & Elaine Nimons
John & Marie Niski
Nolan Family Living Trust
Gregory & Stacie Nole
Ronald Novick
Daniel & Jacinta Nyzio
O & G Industries, Inc.
Oak Cliff Cemetery
Association

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William & Diane O'Connor
Michael & Beverly O'Hara
Jessica O'Meara
Mark & Patricia Oczkowski
Ray & Deb Oppel
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& Alexis Stamos
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Louise Pagliaro
Rosemary Pagliaro
Jeffrey & Pamela Palmucci
Robert & Karen Paradis
David & Paulette Patrick
Christopher Pawlowski
John Pawlowski
& Pamela Petro
Kerry Pawlyk
Susan Pearsall
Richard & Lois Peck
Jon & Kristin Pedersen
Steven & Davida Pepe
Perry Hill School
Craig & Lynne Perry
Denise Petello
Kim Peters
John & Isabel Petersen
Kathleen & Maureen Petro
Melanie Petro
Michael & Susannah Petro
Brian & Kerry Piccolo
Michele Piccolo
Patty Picoli
Pine Grove Cemetery

*The Valley...
It takes*

Valley Community Foundation SUPPORTERS, CONTRIBUTORS AND FUNDERS

It takes the Valley

Association
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Frank & Marie Pisacane
David & Alicia Plant
Daria Ploski
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Wendy Poeta-Tisi
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Seymour CT Lions, Inc.
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Seymour High School
Seymour High School
Goal Club
Seymour Historical Society
Seymour Pink, Inc.
Seymour Police Department
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James & Holly Sheehy
Shelton Education
Association Inc.
Shelton High School
Shelton Land
Conservation Trust
John & Sue Shugrue
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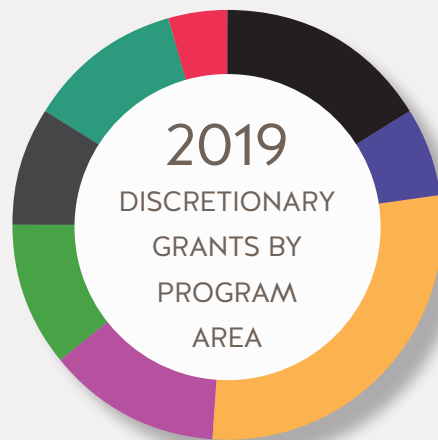
Sikorsky Financial
Credit Union
Ronald & Joyce Sill
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St. Vincent de Paul
of the Valley
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Coutinho Teixeira
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Gary & Marybeth Zaremski
Adrienne Ziemkiewicz
Ronald Zlotoff
& Donna Kemper
Katherine Zollo
Gary & Debra Zrelak
Elliot Zucker & Margaret
Beaumont Zucker
Joseph & Cynthia Zuraw
Nicholas & Stephanie Zuraw
Sandra Zuraw

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.



	\$116,200 - CHILDREN & YOUTH
	\$47,500 - EDUCATION
	\$201,433 - HEALTH
	\$91,783 - BASIC HUMAN NEEDS
	\$76,960 - CIVIC VITALITY & SOCIAL JUSTICE
	\$64,750 - ECONOMIC SUCCESS
	\$83,150 - ARTS & CULTURE
	\$29,894 - ENVIRONMENT

\$711,670 - GRAND TOTAL

Includes Needs & Opportunities, New Responsive, Multi-year, and Community Grant Programs.
Excludes commitment to community initiatives.

Note: This data reflects grants made through the Responsive, Needs and Opportunities, and Community Grants processes, and includes previous multi-year grant support paid in 2019. It does not include \$87,212 in 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, Oxford, Seymour and/or Shelton. These grants are awarded to address a nonprofit's operating, programmatic, or capacity building needs.

** Denotes total multi-year commitment*

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

Boys & Girls Club of the Lower Naugatuck Valley – To support the enhancement of security systems at its program locations and to support staff trainings. **\$64,400***

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

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

Christ Episcopal Church – To provide general operating support for the Kathleen Samela Food Pantry. **\$75,000***

Griffin Hospital – To support a surgical equipment expansion project to increase surgical capabilities and expand capacity to better serve patients. **\$50,000**

Shelton Economic Development Corporation – To support the administration of the Comprehensive Economic Development Strategy for the Naugatuck Valley Corridor/Economic Development District. **\$45,000***

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.

Adam Wysota Foundation – To provide general operating support for children and families coping with the death of a loved one. **\$3,900**

Center Stage Theatre, Inc. – To support the purchase of new equipment including a digital sound board, amplifiers, monitors, power sequencer, and an equipment rack as well as the cost of installation labor. **\$9,190**

Connecticut Audubon Society – To support the Science in Nature Education Program for elementary school children at Ansonia Prendergast School and Seymour Chatfield LoPresti School. **\$9,894**

Community INVESTMENTS

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**

Derby Public Library – To support the “Van Gogh Find Yourself” program. **\$1,750**

Echo Hose Hook and Ladder Volunteer Ambulance Corps, Inc. – To support the Community Educational Center, a community programming space for Valley nonprofits. **\$9,600**

Family Re-Entry – To support the EXPLORE Program for domestic violence male offenders within the Derby area. **\$3,000**

Housatonic Council, Boy Scouts of America – To support the purchase of a new warmer for food preparation as well as repairs to the foundation of the Dining Hall at Camp Strang. **\$6,500**

Ivoryton Playhouse – To support bus transportation for students from Emmett O'Brien Technical High School in Ansonia to attend a performance of Guess Who's Coming to Dinner. **\$228**

Literacy Volunteers of Greater New Haven – To support consultant costs to help develop an action plan to address concerns around under-utilization of programs in the Valley. **\$2,500**

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 overall production and orchestral costs of the Pops Series in the Valley and to supply KidTix tickets to Valley children who otherwise might not be able to attend this performance due to financial

hardships, as well as senior citizens living in public housing in the Valley. **\$10,000**

Oxford Historical Society – To support the relocation and restoration of an 1850's one-room schoolhouse, otherwise slated for demolition. **\$9,000**

Oxford Parent-Teacher Organization – To support the design and construction of the Great Oaks Trail System. The Town of Oxford is acting as the fiscal sponsor. **\$10,000**

Shelton Historical Society – To support construction projects that will promote water diversion from the basement office. **\$10,000**

Valley Shakespeare Festival – To support programming and fundraising efforts throughout the year. **\$10,000**

Valley United Way – To support a strategic planning process. **\$10,000**

COMMUNITY GRANTS

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

Annual Thanksgiving Basket Committee – To support the purchase of perishable and non-perishable food items and supplies for distribution of Thanksgiving baskets to families in need. **\$1,250**

Derby Historical Society – To provide transportation assistance to Valley schools to visit the General David Humphreys House. **\$2,500**

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. **\$1,500**

Oxford Senior Center Singers – To support the purchase of a keyboard/synthesizer and accessories so that the Senior Center Singers will have accompaniment during their rehearsals and performances. **\$2,110**

Seymour Soccer Association – To support an indoor winter activity to promote physical activity and learning, improving soccer foot skills such as dribbling, ball handling, and other skills useful when playing the game of soccer. **\$2,500**

Shelton Historical Society – To support an exhibit of rarely seen artifacts, photographs, and documents throughout Shelton History Center (SHS), in time for the 50th anniversary of the founding of SHS as well as the 100th anniversary of the adoption of the name of the City of Shelton. **\$2,415**

Shelton Youth Services Bureau – To support the cost of sending as many high school students as possible to the Youth 2 Youth National conference in Rhode Island **\$2,500**

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

Community INVESTMENTS

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 Dancing with the Stars benefit. **\$1,000**
- To sponsor the 4th Annual Mistletoe & Margaritas - a holiday shopping night to support Adam's House. **\$500**

American Legion, Emil Senger Post 10 - To sponsor one boy and one girl from Seymour to attend the Boys/Girls State Program. **\$700**

American Legion, John Collins Post 24 - To sponsor one boy and one girl from Derby to attend the Boys/Girls State Program. **\$700**

American Legion, Sutter-Terlizzi Post 16 - To sponsor one boy and one girl from Shelton to attend the Boys State and Girls State Program. **\$700**

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

Association of Fundraising Professionals, Fairfield County Chapter - To sponsor the National Philanthropy Day Celebration. **\$900**

BHcare - To sponsor the 31st annual Bowl-2-Benefit The Umbrella Center for Domestic Violence Services. **\$1,000**

Boys & Girls Club of the Lower Naugatuck Valley

- To sponsor The John "Red" Larsen Golf Classic. **\$500**
- To sponsor the 18th Commodore Hull Thanksgiving Day 5K Road Race. **\$2,500**

Celebrate Shelton - To sponsor the Mamas & Mimosas, Downtown Sounds Summer Concert Series, Food Trucks on the River, and the Community Tree Lighting events. **\$2,500**

Center Stage Theatre, Inc. - To sponsor a Center Stage Christmas Show. **\$1,000**

Central Connecticut Coast Young Men's Christian Association, Inc. - To sponsor the Valley YMCA Annual Sunset 5K & 2 Mile Fitness Walk. **\$2,500**

Christian Counseling & Family Life Center - To sponsor the 5K Health Body, Healthy Mind race. **\$500**

Connecticut Hurricanes Drum and Bugle Corps, Inc. - To sponsor a drum and bugle corps competition at Seymour High School. **\$500**

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

Derby Historical Society

- To sponsor the Annual Silver Tea. **\$750**
- To sponsor the Autumn Tavern Night. **\$850**
- To sponsor the 29th Annual Fundraising Appeal. **\$800**

Friends of the Ansonia Library - To sponsor the performance of Osaki-san: William Gillette's Gentleman Valet, in partnership with the East Haddam Stage Company. **\$425**

Friends of the Ansonia Nature Center (FANCI)

- To sponsor the Earth Day celebration. **\$600**
- To sponsor Autumn Fest. **\$500**

Greater Valley Chamber of Commerce - To sponsor the annual Holiday Breakfast Club and Awards Celebration. **\$1,000**

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

Hidden Acres Therapeutic Riding Center - To sponsor the 2nd annual Kentucky Derby Party and Fundraiser. **\$500**

Housatonic Council, Boy Scouts of America - To sponsor the 25th Annual Valley Good Scout Award Ceremony. **\$1,000**

Junior Achievement of Greater Fairfield County

- To sponsor the High School Business Challenge at Sacred Heart University. **\$1,000**
- To sponsor the 19th Annual Golf Invitational. **\$250**
- To sponsor the Business Hall of Fame. **\$1,000**

Knights of Columbus Bernardo Council 1350 - To sponsor a Family Mini-Golf Outing and a Banquet at St. Margaret Mary Church Hall to benefit Masters Table, St. Vincent de Paul, and Spooner House. **\$250**

Literacy Volunteers of Greater New Haven - To sponsor the 18th Annual Scrabble Challenge. **\$500**

Lower Naugatuck Valley Parent Child Resource Center - To sponsor the Ride/Walk for Children at Quarry Walk. **\$1,000**

Massaro Community Farm - To sponsor Valley Shakespeare Festival shows and additional fall-themed activities at the Farm. **\$1,000**

Community INVESTMENTS

Master's Table Community Meals – To sponsor the 4th annual fundraiser, “At the Hop”. **\$500**

Naugatuck YMCA – To sponsor the 1st Annual Bewitching Night. **\$250**

Northeast Organic Farming Association of Connecticut, Inc. – To sponsor the 37th Annual Winter Conference. **\$1,000**

Oxford High School Booster Club, Inc. – To sponsor a Senior Night Lock-In event the evening before graduation. **\$750**

Polish American Foundation of Connecticut, Inc. – To sponsor the 7th Annual International Folk Dance Festival. **\$500**

Recreation Camp, Inc. – To sponsor the 103rd Annual FOBAL Feast at the Camp. **\$500**

Seymour Christmas Parade Association – To sponsor the 47th Annual Seymour Christmas Parade. **\$1,000**

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

Seymour Historical Society – To sponsor the 2019 educational speaker series. **\$2,500**

Seymour Pink – To sponsor the 8th Annual Pounding the Pavement for Pink 5K run/walk. **\$2,500**

Seymour Public Schools – To sponsor the Dialed Action Sports BMX team to present an anti-bullying, anti-substance abuse prevention program. **\$2,000**

Shelton Exchange Club Foundation, Inc. – To sponsor the 7th Annual indoor mini golf tournament. **\$500**

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

Shelton High School Robotics Team – To sponsor the Shelton Robotix FLL Competition. **\$1,000**

Shelton Historical Society – To sponsor its 2019 educational programs and events. **\$1,000**

Shoreline Arts Alliance – To sponsor the 125th Anniversary Gala. **\$500**

St. Joseph High School
– To sponsor a post prom event. **\$750**
– To sponsor the Maroon & Gold Gala. **\$500**

St. Mary St. Michael School – To sponsor the 11th Annual Housy River Duck Race. **\$500**

St. Vincent de Paul of the Valley – To sponsor three holiday performances to benefit St. Vincent de Paul, TEAM's Meals on Wheels Program, and Adam's House. **\$1,000**

TEAM, Inc.
– To sponsor Unity in the Community Dinner & Cabaret. **\$750**
– To sponsor the 12th Annual Men Who Cook event. **\$1,000**
– To sponsor the 3rd Intergenerational Fashion Show and Luncheon. **\$750**
– To sponsor the Toys4Kids Kick-Off Breakfast. **\$1,000**

The Kennedy Center – To sponsor the Annual Brewfest Fundraising Event. **\$1,000**

Treasured Time – To sponsor the 3rd Annual Driving for Memories Golf Outing. **\$500**

Troop 3 - Derby BSA Alumni & Friends Foundation, Inc. – To sponsor the 95th Annual Scout Gang Show. **\$500**

United Methodist Homes – To sponsor the Wesley Village 50th Anniversary Extravaganza. **\$500**

Valley Council for Health and Human Services – To sponsor the Annual Meeting. **\$500**

Valley Early Childhood Task Force – To sponsor the 11th Annual Read Across The Valley Event. **\$1,500**

Valley United Way – To sponsor the following events: Annual Fundraising Kickoff, Communitini, and Harvest House. **\$2,500**

RECOGNITION GRANTS

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

Charles L. Flynn Humanitarian Award – Valley United Way
Susan Coyle – Grant to the Valley United Way

Community INVESTMENTS

Gold Seal Awards – Greater Valley Chamber of Commerce

Alan Tyma (Platinum) – Grants to BHcare, Griffin Hospital, Shelton Economic Development Corporation, and the John Tyma Fund at the Valley Community Foundation

Jason Carlucci (Gold) – Grants to the Boys & Girls Club of the Lower Naugatuck Valley and St. Vincent de Paul of the Valley

Eric Hendlin (Gold) – Grant to the Shelton High School Marching Gael Parents Association

Nicole Herlot Mikula (Gold) – Grants to the Adam Wysota Foundation and Center Stage Theatre

Valley Soul Gospel Choir (Silver) – Grant to TEAM, Inc.



L to R: Sharon Closius, Jay Carlucci (Gold Seal), Nicole Heriot-Mikula (Gold Seal), Angela Clemmons (Silver Medal – Valley Soul Gospel Choir), Alan Tyma (Platinum Award), and Eric Hendlin (Gold Seal)

Good Scout Award – Housatonic Boy Scout Council

Thomas D'Addario – Grant to the Housatonic Council, Boy Scouts of America

Dr. John Ireland Howe Award – Derby Historical Society

Marian O'Keefe – Grant to the Derby Historical Society

Raymond P. Laviertes Service to Youth Award

Karen Bentlage – Grant to the Boys & Girls Club of the Lower Naugatuck Valley

Silvia Rodriguez – Grant to the Boys & Girls Club of the Lower Naugatuck Valley

Women Making a Difference – Valley Women's Health Initiative

Barbara Casagrande – Grant to the Valley Breast Health Care Fund at the Valley Community Foundation

Dr. Joyce Chung – Grant to the Griffin Hospital Development Fund to support the Department of Radiation Oncology

Elizabeth Kennard – Grant to TEAM, Inc.

Elizabeth Johnson – Grant to Area Congregations Together, Inc.

Kathy Radin – Grant to the Valley Breast Health Care Fund at the Valley Community Foundation

Maggie Sessa – Grant to the Griffin Hospital Development Fund to support the food bank for people receiving cancer treatment

In Recognition for their Service

Fred Ortoli – in honor of his retirement after years of capturing all the memorable events in the Valley. Grants to the Boys and Girls Club of the Lower Naugatuck Valley, Lower Naugatuck Parent Child Resource Center, and TEAM, Inc.



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.

American Red Cross, CT Chapter
Animal Haven, Inc.
Ansonia Public Schools
Ansonia Rescue Medical Services
Area Congregations Together, Inc.

Community INVESTMENTS

BHcare
Boys & Girls Club of the Lower Naugatuck Valley
Boy Scout Troop 3 Derby
Bridgeport Hospital Foundation, Inc.
Catholic Charities Archdiocese of Hartford
Center Stage Theatre, Inc.
Christ Episcopal Church
Clark Memorial Library
Connecticut Hospice, Inc.
Connecticut Forest & Park Association
Cornell College of Agriculture & Life Sciences
Doctors Without Borders
Derby Historical Society
Derby Running Club
DonorsChoose.org
Eagle Hose #6
East Haven Food Pantry at Epiphany
Church of Christ
Friends of the Ansonia Nature Center (FANCI)
Girl Scouts of Connecticut, Inc.
Griffin Hospital
Griffin Hospital Development Fund
Greater Valley Chamber of Commerce
Housatonic Council, Boy Scouts of America
IRIS - Integrated Refugee & Immigrant Services
Junior Achievement of Greater Fairfield County
Literacy Volunteers of Southern Connecticut
Lower Naugatuck Valley
Parent Child Resource Center
Massaro Community Farm, Inc.
Master's Table Community Meals, Inc.
Mishkan Israel Day Camp TEAM, Inc.
National Right to Work Legal Defense
and Education Foundation
Pathfinders Associates, Inc.
Recreation Camp, Inc.
Ronald McDonald House of CT, Inc.
Salvation Army, Greater Valley Corps
Seymour High School
Seymour Oxford Food Bank
Shelburne Farms

Shelton Economic Development Corporation
Shelton High School
Shelton Historical Society
Shelton Land Conservation Trust
Southbury Land Trust
St. Vincent de Paul of the Valley
Susanna Wesley School
TEAM, Inc.
The Foundation School
Working Lands Alliance
University of New Haven
Valley YMCA
Yale New Haven Hospital Saint Raphael Campus

DESIGNATED GRANTS AND ORGANIZATION FUND TRANSFERS

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

Ansonia Public Schools
Ansonia Rotary Club
Assumption Church
Boys & Girls Club of the Lower Naugatuck Valley
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 Hospital
Housatonic Council, Boy Scouts of America
Lower Naugatuck Valley
Parent Child Resource Center
Oak Cliff Cemetery Association
Oxford High School



Planetree, a Subsidiary of
Griffin Health Services, Inc.
Plumb Memorial Library
Recreation Camp, Inc.
Seymour Oxford Rotary Club
Seymour Pink, Inc.
Shelton High School
Shelton Historical Society
St. Mary's Church
Storm Engine Company Ambulance Corps, Inc.
TEAM, Inc.
Town of Seymour
Trinity Cemetery Association
Trinity Episcopal Church
Valley YMCA
Valley United Way
Woodbridge Town Library

Community INVESTMENTS

SCHOLARSHIPS

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

Academy of Our Lady of Mercy, Luralton Hall
Amity Regional High School
Ansonia High School
Assumption School
Boys & Girls Club of the Lower Naugatuck Valley
Bunnell High School
Central Connecticut State University
Delaware Valley University
Derby High School
Derby Public Schools
DeSales University
Emmett O'Brien Regional Technical School
Fairfield University
Hamden High School
Johnson and Wales University
Oxford High School

Scholarships

68 Funds

\$2,673,584 – Total Assets
86 – Total Grants
\$173,967 – Grant Amount

Rensselaer Polytechnic Institute
Sacred Heart University
Seymour High School
Shelton High School
The Culinary Institute of America
University of Bridgeport
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.

BHcare
Boys & Girls Club of the Lower Naugatuck Valley
Central Connecticut Coast YMCA
Derby Historical Society
Griffin Hospital
Housatonic Council, Boy Scouts of America
Literacy Volunteers of Greater New Haven
Online Journalism Project, Inc.
Salvation Army, Greater Valley Corps
TEAM, Inc.
Valley Council for Health and Human Services
Valley Emergency Medical Services

Unrestricted and Preference Funds

14 Funds

\$2,900,954 – Total Assets
20 – Total Grants
\$146,127 – Grant Amount

Stewardship OF CHARITABLE ASSETS

The Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF) have been affiliated for the past 16 years, and the assets entrusted to VCF since 2004 have been invested and managed by TCF. Access to TCF's comingled investment management program affords VCF funds the benefits of a diverse, long-term and global endowment model by providing direct access to over 40 world-class institutional investment managers specializing in more than ten differentiated asset classes.

VCF posted a return of 16.6%, net of the expense of managing the Commingled Fund, against the market benchmark of 17.1% for the year ended December 31, 2019. Even during these times of market volatility, the annualized net return of the Commingled Fund for the trailing 3, 5, 7, and 10 years 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 resources into the community.



Raymond Oppel
Treasurer, Valley
Community Foundation

INVESTMENT PERFORMANCE

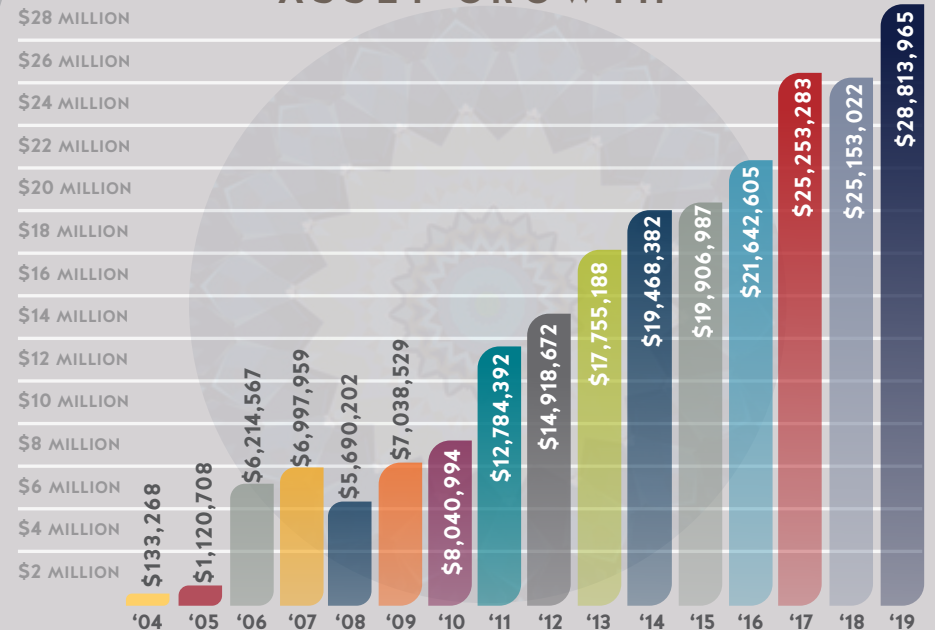
Annualized, expressed as a %, and net of investment expenses.

Periods ended 31 December 2019 (expressed in percentages)	Trailing 1 Year	Trailing 3 Years	Trailing 5 Years	Trailing 7 Years	Trailing 10 Years
Actual Results (net of expenses)	16.7	9.7	7.2	9.0	8.7
Market Benchmark¹	17.1	8.5	6.1	7.1	7.0
Value Added	(0.4)	1.2	1.1	1.9	1.7

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

Past performance is no indication of future results.

ASSET GROWTH



Fiscal 2019 IN REVIEW

FINANCIAL POSTION

	2019	2018
Assets		
Cash and cash equivalents	\$825,340	\$780,787
Investments at market value - component funds	19,064,391	15,431,714
Investments at market value - organization funds	8,853,135	7,516,370
Total investments	28,742,866	23,728,871
Contributions receivable	15,000	1,355,000
Other assets	3,850	7,103
Furniture and equipment, net of accumulated depreciation	52,249	62,048
Total assets	\$28,813,965	\$25,153,022
Liabilities and Net Assets		
Accounts payable and accrued expenses	\$7,865	\$81,229
Organization funds	8,853,135	7,516,370
Grants payable	191,568	222,145
Total liabilities	9,052,568	7,819,744
Net assets without restrictions	19,761,396	17,333,278
Total liabilities and net assets	\$28,813,965	\$25,153,022

STATEMENT OF ACTIVITIES

	2019	2018
Revenue, Gains and Other Support		
Contributions	2,203,963	3,541,682
Less: contributions to organization funds	(545,563)	(1,674,629)
Net contributions	1,658,400	1,867,053
Investment gain, net	2,727,552	(580,649)
Investment Income from Organization Funds	94,358	126,700
Total revenue, gains and other support	4,480,310	1,286,404
Expense		
Grants approved, net	1,717,941	1,802,865
Less: grants from organization funds	(296,132)	(177,818)
Total grant and program expense	1,421,809	1,625,047
Grants for program management and direct charitable activities	378,229	374,847
Net grant and program expense	1,800,038	1,999,894
Development, donor services and fund stewardship	157,596	156,186
Financial, endowment, and investment management	94,557	93,712
Total administration expense	252,153	249,898
Total expense	2,052,191	2,249,792
Increase (decrease) in net assets	2,428,119	(963,388)
Net assets - Beginning of year	17,333,278	18,296,665
Net assets - End of year	19,761,396	\$17,333,278

FISCAL 2019 IN REVIEW

Full audited financial statements are available at www.valleyfoundation.org.

2019 COUNCILS, COMMITTEES AND VOLUNTEERS

2019 COUNCILS, COMMITTEES, AND VOLUNTEERS

BOARD OF DIRECTORS

Lynne Bassett Perry, *Chair*
 Don Smith, Jr., *Vice Chair*
 Ray Oppel, *Treasurer*
 Marianne Smythe, *Secretary*
 James Hodge
 Terry Jones
 Robert Lesko
 Jennifer Magri
 Francis Michaud, Jr.*
 Aleta Miner
 Fred Ortoli
 Angela Powers
 Thomas Sutnik
 Alan Tyma
 Jack Walsh

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 William H. Bassett
 Tammy Burrell
 Gail Catlin
 Jamie Cohen
 David Condon
 Edmund Conklin
 Susan Coyle*
 Maryanne DeTullio
 Nancy Dickgiesser
 Tim Dillon
 Rick Dunne
 Peter Francini
 Marc Garofalo
 Larrow Garrett
 Dave Grant
 Chris Grizzle
 Liz Kennard
 Fred King
 Robert Lesko
 Ernestine Luise
 Michael Marcinek
 Susan Mauriello
 Bill Miller, Jr.

Ned Miller
 Aleta Miner
 William Nimons
 Dan Onofrio
 Ellen Pagliaro
 Joseph Pagliaro, Jr.
 Al Paolozzi
 Mary Pepe
 Kathy Riddle
 David Rifkin
 James Ryan
 Ed Santa
 Kenneth Schaible
 Ed Sheehy
 Janice Sheehy
 Angelika Stamos
 Gregory Stamos
 Fred Stanek
 Karen Stanek*
 Diane Stroman
 Leon Sylvester
 Pat Tarasovic
 Nancy Valentine
 Robert Van Egghen
 Thomas Welch
 John Zaprzalka

DEVELOPMENT COMMITTEE

Jennifer Magri, *Co-chair*
 Marianne Smythe, *Co-chair*
 Robert Lesko
 Francis Michaud, Jr.*
 Aleta Miner
 Lynne Bassett Perry
 Thomas Sutnik
 Alan Tyma

PROGRAM COMMITTEE

Jack Walsh, *Chair*
 Robert Lesko
 Ray Oppel
 Fred Ortoli
 Lynne Bassett Perry
 Angela Powers
 Donald Smith, Jr.

COMMUNITY GRANTS MEMBERS

Liz Kennard, *Chair*
 Janice Bonaparte-Morris

Beth Carson
 Gail Catlin
 Jennifer Champagne
 Martha Dulla
 Ray Oppel
 Fred Ortoli
 Lynne Bassett Perry
 Angelika Stamos
 Marianne Smythe
 Jack Walsh

RESPONSIVE GRANTS COMMUNITY REVIEWERS

Leon Bailey
 Marilyn Cormack
 Kathleen Cosgrove
 Martha Dulla-Andrade
 Marc Garofalo
 Ed Kisluk
 Richard Knoll
 Ruth Parkins
 Karen Spargo
 Jack Walsh

FINANCE COMMITTEE

Ray Oppel, *Chair*
 Francis Michaud, Jr.*
 Lynne Bassett Perry
 Alan Tyma

GOVERNANCE COMMITTEE

Don Smith, Jr., *Chair*
 James Hodge
 Jennifer Magri
 Lynne Bassett Perry
 Alan Tyma

MISSION RELATED INVESTMENT COMMITTEE

Alan Tyma, *Chair*
 Francis Michaud, Jr.*
 Aleta Miner
 Ray Oppel
 Diane Stroman

**Deceased during 2019*

VCF THANKS THE FOLLOWING OUTGOING BOARD MEMBER:



Lynne Bassett Perry

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, programing 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.

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

Your Impact, Made Easy ESTABLISHING A FUND AT VCF

STEP 1

Tell us how you would like your fund to be used.

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

STEP 2

Tell us what you would like to name your fund.

This will be your legacy: One hundred years from now, your fund will still be making grants. Or, you may set up the fund anonymously if you prefer.

STEP 3

Contact the office

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

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

We will help you tailor your giving to fit your charitable goals and your personal situation. You may choose to give now or give later. Either way, we will ensure that your legacy and interests will be honored today, tomorrow, and forever. Our staff and board have deep local knowledge that helps determine the areas of greatest need and where our grants can be most effective.

Your gift benefits from being part of a larger whole. Our funds are managed as part of The Community Foundation for Greater New Haven's (TCF) diversified investment portfolio. Over time, as the endowment grows, so do 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.

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

253-A ELIZABETH STREET | DERBY, CT 06418
PHONE: (203) 751-9162



www.valleyfoundation.org

