

Sharing the Journey TO A STRONGER COMMUNITY

VALLEY COMMUNITY FOUNDATION 2017 ANNUAL REPORT





A Year in Review

Dear Friends,

Anyone who has traveled through the Valley can tell you there are many landmarks to visit and sign posts to guide you along your way. Fixed between two rivers, the Valley offers numerous trails to explore while taking in all the beautiful scenery in our region. Experiences such as these can have an effect on our perspective that can last a lifetime.

Like any good hike, the Valley Community Foundation (VCF) has selected a destination with a clear direction, and is making purposeful strides towards a stronger community. As we chart our course, we are fortunate to be joined by fundholders, nonprofits, The Community Foundation for Greater New Haven, and community members, just like you, who support our mission.

Since 2016, our biggest trail marker has been the Valley Community Index, which has helped to guide us along our path. This information has helped inform us about where we were, where we are now, and where we are headed.

Last year, VCF helped create and support the Valley Interfaith Council. This Council is steadily growing and is already approaching 20 members of the region's faith-based community.



Also in 2017, VCF, in collaboration with local nonprofits, launched the Valley Gives Back™, a community-wide planned giving initiative that encourages people to remember their favorite Valley charities in their estate plan. It has never been easier to discover how your charitable goals can align with your financial plan. By planning now and giving later, you can impact the Valley tomorrow and for generations to come!

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A Year in Review

With governmental budgets in flux and a growing need for services, there has never been a more important time for VCF to support organizations committed to this region. During these times, when it is becoming increasingly dependent on citizenry to build, protect, and enhance the vibrancy of the community, we are confident that our strategic grantmaking will help provide a reliable source of funding during a time of financial uncertainty.

To date, nearly 180 funds have been established at VCF with total assets now over \$25 million! Your contribution ensures that each step towards a stronger community is both meaningful and impactful. With this support, we are working with our regional partners for the long-term good of the Valley.

Much like a hike, our work going forward requires putting one foot in front of the other over a period of time. If we allow ourselves the opportunity to be present throughout the entire trek, as a community, we can experience something beautiful in every step along the way, not just the view from the top.

We invite you to join us in sharing the journey to a stronger community.

Alan Tyma
Board Chair

Sharon Closius
President and CEO



**GRANTS
AWARDED**
\$1,438,813

SHARING THE JOURNEY

CONTRIBUTIONS
\$2,011,272

**NEW
FUNDS**
7



Valley Interfaith Council



Faith has the power to unite people of all backgrounds and communities in working together in service above self. At a time when municipalities, congregations, and nonprofits are struggling more than ever before to meet the needs of their constituents, bringing people together and sharing knowledge of key issues has never been so important.

The Valley Interfaith Council (VIFC) was formed in January 2017 and is comprised of faith-based leaders throughout Ansonia, Beacon Falls, Derby, Naugatuck, Oxford, Seymour, and Shelton. VIFC members convene bimonthly to explore opportunities for collaboration and receive information on matters facing our Valley residents through a speaker series. Topics to date have ranged from food insecurity to elder care, to the opioid crisis.

While it is often said that no man is an island, so, too, does this apply to a congregation or house of worship. While one faith based group may see more families without basic needs such as food or shelter, another could see requests for services and resources among the growing aging population. This can even occur from neighborhood-to-neighborhood in any given town or city.

VIFC provides a platform for faith-based leaders to break down silos and become more informed about these changing needs and opportunities.

Most importantly, members of the Council hope to increase their awareness and understanding of important issue areas to be a stronger resource for their congregations and the communities they serve.

For example, the data released in the 2016 Valley Community Index shows that our region is changing and becoming increasingly diverse. Additionally, by the year 2025, the population of Valley residents ages 65 and older is projected to be 23%, with 9 out of 10 seniors wanting to age in place. These two facts alone will change the scope of services needed from the Valley community in a relatively short period of time.

The Valley Community Foundation (VCF) and the Valley United Way (VUW) are working together to support this initiative and have hired a facilitator to support VIFC with planning and administration. VCF has provided financial support for the work, while VUW serves as the fiscal agent and makes office space available.

Learning to respect others of differing faiths and beliefs can help to break down barriers in the short term and strengthen lasting relationships throughout the Valley region. VIFC welcomes new members and looks forward to working inclusively with members of all faiths in the years ahead. To learn more about the Valley Interfaith Council or how your congregation can get involved, please call 203-926-9478.

The Valley Gives Back™



local nonprofits, especially small organizations, find it challenging to compete with these larger and more concentrated development campaigns. That is why the Valley Community Foundation (VCF) launched the Valley Gives Back™ - a community-wide planned giving initiative that strives to build philanthropy across the Valley in collaboration with local nonprofits.

VCF is working with local nonprofits and professional advisors to help educate and build awareness of planned giving vehicles. Through the use of targeted marketing materials, workshops, billboards, advertisements, direct mail, and a new single-source website, VCF is demystifying how planned giving works, showing how easy it can be to make an impact without changing one's current lifestyle. The Valley Gives Back™ is also a way local nonprofits can work to build their long-term sustainability through planned gifts while they address immediate needs in the community.

As VCF helps to build the resource development capacity of the Valley's nonprofits, we will continue to be available as a trusted partner for professional advisors, nonprofits, and members of the community. Although donors do not have to work through VCF to establish a planned gift, VCF is certainly an option in achieving one's philanthropic goal.



For many, the Valley has been home for generations and, even if unrelated, Valley residents consider one another as family. Fixed between three of the state's major cities, each with unique needs, the Valley has learned to take care of its own by ensuring local programs and services are available, accessible, and impactful.

Throughout the years, much of the funding for these programs was made available by federal and state grants, as well as from private donations from individuals and foundations. However, cuts in both federal and state budgets leave these critical programs vulnerable at times when they are most needed. As a result, community members in need are becoming increasingly more dependent on others who share their time, talent, and treasure through our nonprofits.

A 2014 Boston College Center on Wealth and Philanthropy Report estimated that nearly \$60 trillion will be transferred to younger generations in the United States over the next 40 years. During the next half-century, planned giving will have a critical role in the nonprofit sector, from the smallest local charity to the largest worldwide nonprofits, representing a fundamental shift in the field of philanthropy.

While national and international causes are sending a range of appeals to donors, and universities inundate their alumni with pleas for support,

Learn more about the Valley Gives Back™ initiative and a range of planned giving vehicles at www.valleygivesback.org.

A photograph of a billboard for "theValley Gives Back" mounted on a building. The billboard features the same family photo as seen in the top left. Below the billboard is a classical building with columns and a pediment.



The Gates Society



An ordinary signature can make an extraordinary difference.

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

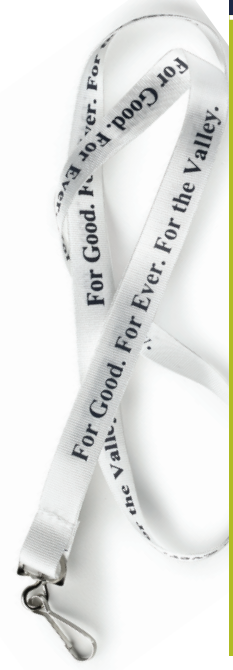
Today, people tend to make charitable gifts from their income and hold onto their assets for the unpredictable needs they may have in their golden years. This is where planned giving comes in. You can make a plan to give to a fund, or establish a fund, when you no longer need those assets. Just like someone will plan to give something to family and friends when they pass, they can also make a gift to the Valley through VCF.

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 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. Here's how:

- Name VCF in your will or trust for a specific percentage or amount, as a residual gift, or contingent gift.
OR
- Designate VCF as the beneficiary to an insurance policy, individual retirement account (IRA), 401k, or checking/savings account.
OR
- For another stream of income, create a Charitable Gift Annuity and benefit from an immediate tax break and guaranteed income for life. Upon your passing, VCF receives the remaining balance and fulfills your philanthropic wishes.
OR
- Leverage the power of charitable remainder trusts or charitable lead trusts to perpetuate your values and your wealth for both your heirs and your charitable intentions.

GATES SOCIETY MEMBERS



- Sharon Closius
- Jamie Cohen
- Jane Cohen*
- Edmund J. Conklin*
- Patricia DeCicco
- Walter and Bonnie Drozeck
- Helen Dubrava*
- Bob and Sheri Grier
- William and Jo-Anna Holden
- Heidi Kaplan
- Liz Kennard
- Laura Lane
- Robert Lang
- Raymond F. Mackowski*
- Dorothy Palazzi
- Brad and Marianne Smythe
- Valentina Vitali*
- Donald Warichar
- Joseph Warichar
- John and Laura Zaprzalka

*deceased

The Great Give® 2017



visit thegreatgive.org

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.

Nearly \$1.3 million was raised in The Great Give® 2017, which included donations from individuals, prize money from corporations, as well as matching prize money from TCF and the Valley Community Foundation (VCF). For the fifth consecutive year, VCF has been the second largest sponsor of the event, incentivizing giving by matching funds and offering prizes to participating organizations.

Gifts made by Valley residents, employees, and donor advised fund holders during The Great Give® 2017 totaled nearly \$300,000 for nonprofit organizations located in Ansonia, Derby, Oxford, Seymour, and Shelton. Overall, there were more than 8,000 donors who gave more than 11,000 gifts. To view participating nonprofits and prize information, visit www.thegreatgive.org.



Carol and Dave Pendagast celebrate The Great Give® 2017 prize winners



VCF Board Chair, Alan Tyma, speaks to the participating nonprofits and supporters at the annual ice cream social



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 2017, seven 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.

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.



Marc J. Garofalo Cultural Experience Fund

When you fill your life with experiences instead of things, you gain stories to tell rather than possessions to show. This is why Marc Garofalo established the Marc J. Garofalo Cultural Experience Fund at the Valley Community Foundation (VCF).

“Many funds at VCF support worthwhile organizations or make scholarship funding available for students,” Marc said. “I wanted to

do something a little different and give youth in the Valley the opportunity to have cultural experiences they would otherwise not be able to afford.”

Thirty years ago, Marc traveled to Italy for the first time with his family to see relatives he had never met. The opportunity to visit a foreign country and immerse himself in the culture was life changing. Since that first trip, Marc also helped establish the Derby Sister City Fund at VCF which supports exchange visits between Derby and its Sister City, Puglianello, Italy.

Well over 100 friends and family members joined Marc in making a donation to this Fund in celebration of his 50th birthday, which featured a fun evening of performances and storytelling.

Valley Community Foundation Funds



“I never knew how much impact one trip earlier in my life could have on me all through adulthood,” Marc said. “It just goes to show how powerful a cultural experience can be and how it can change the way someone views the world.”

Marc hopes to work with Valley schools and youth organizations to evaluate opportunities that this fund can support.

“This is a great way to enrich the Valley and keep money local while we try to broaden the horizons and create life-changing experiences for the youth in our community,” Marc added.

Nina Poeta Scholarship Award Fund



Nina Teresa Poeta loved life. She embraced everything it had to offer—family, friends, and faith – and would joyfully share that love with everyone she met. Nina’s boundless enthusiasm, infectious smile, and contagious laughter warmed the hearts of so many throughout the years. After being diagnosed with an inoperable brain tumor and subsequently passing away at the age of 17 in 2014, the Valley became “Nina Strong.” The outpouring of support her mother Dorie, father John, and sister Cara Poeta received from Valley residents and beyond led them to create the Nina Poeta Scholarship Award Fund.

“People have been incredibly generous,” said Dorie. “We received so many contributions from people here in the Valley, the State, and all throughout the world who have honored her memory and celebrated her life. We created this scholarship to ensure Nina’s legacy would live on in perpetuity.”

This year, the Poetas decided to transfer the Scholarship Fund to the Valley Community Foundation (VCF). “We chose to work with VCF because we were born and raised in the Valley, and recognize the impact the Foundation has had on this community,” John continued. “It was a natural fit.”

Through this scholarship Fund, the Poetas are seeking to reward and hopefully inspire youth to participate in charitable community service just as Nina had done. “It’s not about someone with the best grades or the most awards,” said Dorie. “It is more about the person who has gone that extra mile to help those who are disenfranchised, who may be physically or mentally challenged and are in need of a kind word or special support. Those are the qualities that Nina exhibited each and every day.”

The Poetas plan to have the Fund become a designated Fund over time, supporting the Lower Naugatuck Valley Boys and Girls Club, Seymour High School, and the Connecticut Interscholastic Athletic Committee.

“Nina brought out the best in all of us,” said Dorie. “She was that bright beacon of hope and courage that everyone could relate to. She never gave up, and was always smiling and cheering us on. We hope this Fund will leave a ‘trail of glitter’ for other young people to follow Nina’s path of service and light, now and for years to come.”

“We hope this Fund will leave a ‘trail of glitter’ for other young people to follow Nina’s path of service and light, now and for years to come.”

- Dorie Poeta



Valley Community Foundation Funds



Leah Rondon Fund

Losing a loved one is never easy, especially when that loved one is a young child. After a tragic accident took the life of six-year old Leah Rondon, her parents, Henry and Colleen, received a tremendous amount of love and support from the community. The Rondons soon began to explore ways to ensure Leah's legacy and the memory of her vivacious personality could be shared with others.

"Leah was a tiny little thing but she was never shy and always made friends wherever she went," said Colleen. "She loved the arts, sports, school, and was extremely kind-hearted."

Since Leah's sudden passing in 2015, the family has organized an annual Dragonfly Dash 5k in Ansonia and has been amazed by the level of participation. After raising several thousand dollars to support Ansonia's youth, a family friend who was familiar with the Valley Community Foundation (VCF) spoke to Henry and Colleen about establishing a fund in Leah's memory at the Foundation.

"My friend first spoke on our behalf with the staff at VCF. After a few meetings with VCF President and CEO Sharon Closius, we decided to set up a donor advised fund," Colleen said. "It gave us the flexibility to recommend distributions without having to set up a nonprofit of our own. For us, we particularly liked how the money stays right here and, after all, nobody knows the Valley like the Valley."

While the Rondons say they could never repay friends, family, and Valley residents for their overwhelming generosity and support, they now have an opportunity to give back to the community in their daughter's memory.

"We are hopeful that we can work with the schools and teachers in Ansonia each year to determine enrichment experiences we can help provide that the students otherwise wouldn't be able to receive," Colleen said. "It's a great way of honoring our special little girl."



The Smythe Family Fund

Brad and Marianne Smythe have called Shelton home for 35 of their 46 years of marriage, raised two daughters, and are now enjoying spending time with their grandchildren, who also live in Shelton.

"We have always believed in giving as our faith teaches: feed the hungry, shelter the homeless, clothe the naked, and so on," said Brad, an ordained deacon assigned to St. Joseph Parish in Shelton. Brad often sees the needs of those in the Valley

community who are ill, lonely, or who lack basic necessities such as food and shelter.

Brad and Marianne have a long history of giving to specific charities, but it was when Marianne was asked to become a member of the Valley Community Foundation's (VCF's) Board Advisory Council and then eventually serve on the Board of Directors that she discovered a new way to give. As the Smythes learned about all the funds that were established by local families, they said to themselves, "We could do that!"

"VCF President and CEO Sharon Closius listened carefully to our vision and helped us select a fund type that made the most sense for our goals," said Marianne. As a financial advisor, Marianne knew that she and Brad could give appreciated stock to start their fund and grow it over time. They also joined the Gates Society, VCF's planned giving community, by naming their family fund as one of the beneficiaries for a percentage of their retirement accounts along with their daughters.

Brad and Marianne said, "While we will continue to give directly to our church and the charities that are important to us, we appreciate that we can make grant recommendations from our fund each year and trust that our wishes will be carried out long after we are gone."

Valley Community Foundation Funds



DONOR ADVISED FUNDS

Anonymous
Kathleen and Mariano Adamo
Community Service Fund
John and Paraskeve Vartelas 'AGAPE' Fund
Bassett Family Fund
Monty Blakeman Fund
Champagne Family Fund
Cohen-DeToro Charitable Fund
Jane C. and David B. Cohen Fund
Nick Collicelli Legacy Fund
Mary Lou Cicia Cook Memorial Fund
Maria Conlon Humanitarian Fund
Salvatore and Linda Tiano Coppola Family Fund
Susan Coyle Family Fund
Thomas and Ruth Curran Family Fund
D'Addario Family Fund
Michael and Elizabeth Dalton Family Fund
Derby - Puglianello Sister City Fund
Walter and Bonnie Drozeck Fund
Frey-Hershey Foundation Fund
Marc J. Garofalo Cultural Experience Fund*
Mario Garofalo Family Fund

Raymond Gildea Memorial Fund
David M. and Gail A. Grant Family Fund
Guarrera Family Fund
Tyler, Brian and Zachary Haywood Fund
Jones Family Farms Fund
Kaplan Family Fund
Paul and Gloria Konwerski Family Fund
Edward and Laura Lane Family Fund
Robert C. Lang Fund
John Lauretti Memorial Family Fund
Mary Fund
William C. and Elaine N. Nimons Family Fund
Joseph A. Pagliaro, Sr. Family Fund
Palazzi Family Fund
Pepe Family Fund
Nina Poeta Scholarship Award 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. and Kenneth E. Schaible Fund
Louis Schmecker, Jr. Memorial Fund
Mary A. Schmecker Turtle Shell Fund
Seymour Public Schools Fund
Shelton CT Gaels Alumni Fund
Shelton Education Endowment Fund
Smythe Family Fund*
Sterling Opera House Endowment Fund
Sally and Dominick Thomas Fund
John Tyma Fund
Nancy Valentine Fund
Valley Bar Association Memorial
and Commemorative Fund
Valley Breast Health Care Fund
Valley Pride Fund
Alphonso and Eulalia Vitello Family Fund
Warichar Family Fund
Joe and Judy Zaprzalka Family Fund
John and Laura Zaprzalka Family Fund
Katarzyna and Ludwik Zaprzalka Fund

* *New Fund in 2017*

"While we will continue to give directly to our church and the charities that are important to us, we appreciate that we can make grant recommendations from our fund each year and trust that our wishes will be carried out long after we are gone."

- Brad and Marianne Smythe



Valley Community Foundation Funds

DONOR DESIGNATED FUNDS

If you want to show your support to 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.



Henry Shelton Wells and Edith Birdseye Wells Family Fund

There have been Wells family members living in the region since colonial times. Mention the name Wells throughout the Valley, and thoughts may turn to Wells Hollow. Others perhaps may remember the Creamery and tree farm that still exists on the site of the historic Wells Hollow Farm. The Farm, located on Bridgeport Avenue in Shelton, was formerly run by the late Robert L. Wells, and is now operated by Nathaniel Shelton Wells. Henry Shelton Wells and his wife Edith Birdseye Wells dedicated

their lives to working on and preserving that Farm during their lifetime. To honor their parents' deep commitment to the land and to the Valley, family members have come together to create the Henry Shelton Wells and Edith

Birdseye Wells Fund, a Designated Fund at the Valley Community Foundation. "Thanks to the tenacity, dedication, and foresight of our parents, the Farm has remained in our family for generations," said son Thomas H. Wells. "Mom and Dad had many opportunities to sell, especially when times were tough and farms were cheap," added his brother Royal. "Back in the thirties and forties when they were struggling to make ends meet and raise the six of us, it wasn't easy. But they hung in there, and as a result, the farm became their legacy for us. We want to honor our parents for all that they have done by giving back to the community that they loved so dearly."

The brothers and their sister Lovisa Wells Hill have fond memories of growing up on the Farm, and living their lives in the Valley. "We all had chores-everyone was expected to milk the cows, help sell eggs, and do housework," said Royal. "We all pitched in-it was just how life was in a big family." "We didn't have much, but we had each other and that was, and still is, everything," said Tom. "My mother had the best parties all throughout the year-Memorial Day, the Fourth of July, and of course Thanksgiving and Christmas." Lovisa agreed. "Celebrations were such a special time for us on the farm. I was fortunate to have my wedding reception there, and I now proudly carry on my mother's tradition of hosting Thanksgiving there each year," she said.

The Wells Family plans to grow their parents' fund so that annual distributions can be made to support cultural, historical, and pressing needs in the Valley. "Our parents were always there for us throughout our lives," said Tom. "Mom and Dad attended our graduations, and every special event that each of us went through. This is our way of honoring that commitment to us by giving back to Valley nonprofits that are working so hard to make this community a better place for generations to come."

DONOR DESIGNATED FUNDS

Edward J. and Marie M. Cecarelli Book Fund
Lillian Chrostowski
Herbert Clark Fund
Cohen Family Book Fund
Edward J. Cotter, Jr. Memorial Fund
Derby Public Library - Harold B. Yudkin Historic Preservation Fund

Gerry Hellman Eckhardt Fund for the Woodbridge Library
Griffin Family Memorial Fund
Health Initiative for Men (HiM) Fund
Jones Family Farms Fund for the Connecticut Agricultural Experiment Station
Maureen, Megan and Katey Ryan Fund

Gary and Francesca (Riggio) Scarpa Fund for Center Stage Theatre
Dorothy E. and Kenneth E. Schaible Fund for the Boys & Girls Club of the Lower Naugatuck Valley
Frank and Helene Skoronski Memorial Fund
Donald W. and Lillian C. Smith 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 2017

Valley Community Foundation Funds



ORGANIZATION AND FIDUCIARY FUNDS

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

The Massaro Community Farm board of directors and staff believe in slow and thoughtful growth. As part of its ongoing planning and management, the farm felt it had reached a point that it was able to allocate monies to start the Fund as a step towards building a reserve, with the eventual goal of creating an endowment. With much of the farm’s outreach efforts taking place in neighboring Valley towns, it made sense to place the farm’s investment with VCF.

“For us, a sustainable reserve fund strengthens our organization and will be a great resource for our dedicated supporters,” Caty added. “Having a reserve fund at VCF allows money to be invested while we continue our efforts to build support for a farm in our community.”



Massaro Community Farm Fund

Someone is enjoying a harvest today because of the seeds that were planted seasons ago. Just like thoughtful planning is needed to grow crops, so, too, is it required to grow an organization’s reserve fund.

Massaro Community Farm has a mission to keep farming, feed people, and build community for generations

to come. These core principles shape the farm’s operations, workshops, events, and educational programming that take place on its 57 acres to promote the importance of connecting to locally-sourced food.

Located on the Ansonia-Woodbridge town line, the farm supports both Greater New Haven and Valley communities with a vegetable subscription program, on-farm and in-school education, and thousands of pounds of produce, which is given to hunger relief each year.

“We are transitioning from a start-up to a mature entity,” said Executive Director Caty Poole “Establishing a reserve fund at the Valley Community Foundation (VCF) represents the first phase to secure our stake in the community we serve. By no means extravagant, it was the next logical step to grow our future, and signal to the region our intent to continue the tradition of small, diversified farming.”

ORGANIZATION FUNDS

- | | |
|---|--|
| <ul style="list-style-type: none"> 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* Oak Cliff Cemetery Association Fund Parent Child Resource Center Endowment Fund Planetree Fund Plumb Memorial Reserve Fund Plumb Memorial Tri-Centennial Endowment Fund | <ul style="list-style-type: none"> Recreation Camp Endowment Fund Ritchie Fund for Plumb Memorial Library Seymour Seymour-Oxford Rotary Club Fund Seymour Pink Endowment Fund Seymour-Oxford Nursery and Child Care Association (SONCCA) Shelton Historical Society Endowment Fund TEAM, Inc., Richard J. Knoll Endowment Fund TEAM Reserve Fund Town of Seymour Endowment Fund Troop 3 - Derby BSA Alumni and Friends Fund Valley United Way Fund Valley YMCA Endowment Fund Peter J. Vartelas Invest in Youth Fund #1 for the Valley YMCA Veterans of Foreign Wars Post 597 Fund Women In Networking Fund |
|---|--|

* New Fund in 2017



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.



Louis Nicoletti, Sr. Business Scholarship Fund

Few things were more important to Louis Nicoletti Sr. than family, the Valley community, and the value of second-to-none customer service. A lifelong Ansonia resident, Louis began working at his father's store when he was in his mid-teens. He and his brother, William Jr., took over the family business, General Muffler & Auto Supply in Ansonia, nearly half a century ago, which their father originally started in

1945. Over time, Louis quickly built a reputation for his selfless attitude and willingness to get his hands dirty.

"We received so much support from countless people after Louis passed in March of 2017," said wife, Elizabeth Nicoletti. "His long-time customers shared fond memories. His employees and so many people in the community told wonderful stories about Louis. Everyone loved him."

The Nicoletti family began talking about what they could do to honor Louis' memory and keep his legacy alive. He had such an impact on so many people in the Valley.

Louis was involved in a range of business ventures during his lifetime, which included United Avionics, Nicoletti's Brass Button, and Import Auto Center. To honor his passion for business, Elizabeth wanted a fund that acknowledged Louis' entrepreneurial spirit. She also wanted to help graduating students with the high cost of education. The family decided to put their plan into action and created a scholarship fund in Louis' name for Ansonia High School students who will pursue business and entrepreneurial studies in college.

"This was a great way to pass on Louis' high regard for education and the Valley," Elizabeth said. "We hope this Fund can create an impact for students from Ansonia as they venture off to pursue what Louis was so passionate about his whole life."

*"His long-time customers shared fond memories.
His employees and so many people in the community told wonderful
stories about Louis. Everyone loved him."
- Elizabeth Nicoletti*

Valley Community Foundation Funds



SCHOLARSHIP FUNDS

Michael J. Adanti Memorial Community Fund
 Joseph 'Jay' Amico Artistic Memorial Awards Fund
 Ansonia Public Schools Scholarship Endowment Fund
 Ansonia Rotary Club Scholarship Endowment Fund
 Bruno Battaglino Memorial Fund
 Stella Behuniak Fund
 Rachel and William Brogadir Scholarship Fund
 Stanley and Irene Chlebowski Scholarship Fund
 Stephen and Emily Chuckta Memorial Scholarship Fund
 Class of 1940 Scholarship Fund
 Eddy Conklin Scholarship Fund
 Lou and Dolly DeFilippo Scholarship Fund
 Derby High School Endowed Scholarship Fund
 Derby High School Non-Endowed Scholarship Fund
 Domorod-Youd Shelton High School Scholarship Fund
 Agnes and Helen Dubrava Fund

Honorable Joseph P. Flynn and Family Scholarship Fund
 Eugene Imperato Family Scholarship Fund
 Francis Family Fund
 Geissler Family Scholarship Fund
 Brandon Giordano Football Scholarship Fund
 Traci L. Haines Memorial Scholarship Fund
 Arthur Hayes, Jr. Memorial Scholarship Fund
 Randall R. Holden Memorial Scholarship Fund
 Patricia M. Kondrath Scholarship Fund
 Frank J. Lang Fund
 Jesse McCord Lewis Memorial Scholarship Fund
 Michael R. McMahon Scholarship Fund
 Bernice Nicolari-Howard Gura Award Fund
 Louis L. Nicoletti, Sr. Business Scholarship Fund*
 Ann O'Neil Memorial For Integrity Award
 Anthony Pagliaro Scholarship Fund
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* New Fund in 2017

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.

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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

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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.

Discretionary Grants by Program Area Paid in 2017

Note: This data reflects grants made through the Responsive, Needs and Opportunities, and Community Grants processes, and includes previous multiyear grant 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.



Arts (7)	\$71,500
Basic Human Needs (5)	\$92,409
Community Development (6)	\$58,300
Education (6)	\$32,242
Environment (2)	\$20,609
Health (11)	\$160,156
Regional Development (3)	\$70,579
Youth Development (8)	\$127,908
Grand Total (48)	\$633,703

Responsive Grant Program

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*

Boys & Girls Club of the Lower Naugatuck Valley - To provide general operating support for cultural, recreational, physical, and educational programs for Valley youth. **\$120,000***

Central Connecticut Coast YMCA - To provide general operating support for Valley YMCA programming that builds healthy spirit, mind, and body for Valley residents. **\$90,000***

Griffin Hospital - To support the update of radiation oncology equipment at the Center for Cancer Care. **\$25,000**

Housatonic Council, Boy Scouts of America - To provide general operating support for scouting programs for Valley youth. **\$100,000***

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

Massaro Community Farm, Inc. - To provide general operating support to maintain a historic farm that uses organic practices to provide fresh produce to those in need, and to build community through farm-based education and events. **\$60,000***

Online Journalism Project Inc. - To provide general operating support for The Valley Independent Sentinel. **\$120,000***

Salvation Army, Greater Valley Corps - To support the Emergency Assistance Program, which includes a Client Choice Food Pantry, Bread and Pastry Program, Thanksgiving food distribution, Back-to-School backpack distribution, clothing and furniture vouchers, and rental and utility assistance. **\$60,000***

Shelton Economic Development Corporation - To provide general operating support to advance the economic development and public welfare of the City of Shelton. **\$10,000**



Community Investments

Shelton Historical Society, Inc. - To provide general operating support for the Shelton Historical Society to preserve items of Shelton's history, as well as to support educational programming and the maintenance of a museum and its collections. **\$34,000***

TEAM, Inc. - To provide general operating support for a multigenerational service delivery system, focused on support services, early childhood, and elderly services. **\$160,000***

Valley Council for Health and Human Services - To support the establishment of a Valley Food Bank Network that will raise awareness of food insecurity in the Valley, implement best practices amongst Food Pantries, enhance services/outcomes for individuals accessing these Food Pantries, and galvanize increased community support toward the work of established Valley Food Pantries. **\$42,000***

General Operating Support (GOS) grants further the mission and work of nonprofits, allowing grantees to direct support where it is needed most. In 2017, VCF provided the largest commitment of multi-year GOS in its history, recognizing the significant economic challenges Valley nonprofits are facing.

Needs and Opportunities Grants

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

Ansonia Public Schools - To support a diversionary program that can serve as an alternative to suspension at Ansonia Middle School, which serves approximately 380 students in Grades 7 and 8. **\$3,295**

College Access for All Kids, Inc. - To support a two week intensive summer program that will culminate with each student having a writing and math portfolio. **\$5,262**

Connecticut Community Gardening Association - To support scholarships for community gardeners in the Valley to attend the American Community Gardening Association's Annual Educational Conference. **\$1,400**

Family Re-Entry - To support a domestic violence intervention program, EXPLORE, which serves 60 men in Derby each year by educating them to make behavioral changes to eliminate abuse that endangers their families and communities. **\$3,000**

Healthy Eyes Alliance - To support the purchase of a Welch Allyn Spot Vision Screener to detect vision problems in young children. **\$1,648**

Huntington United Methodist Church - To support the creation of a Tranquility/Prayer Garden behind the church. **\$1,800**

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 performances at Shelton High School which include Pops Concerts, Family Concerts, and the NHSO KidTix initiative, providing free tickets for students attending Pops concerts. **\$5,000**

Oxford Center School - To support a field trip to Boston's Freedom Trail for 5th graders from Oxford Center School. **\$1,500**

Seymour Ambulance Association, Inc. - To support the new mobile radios that will equip the SAA officers and chiefs with the ability to communicate with all surrounding area services. **\$5,046**

SHA Development Corp. - To support six units of transitional housing and supportive services for youth between the age of 18-24. **\$10,000**

Shelton High School - To support a greenhouse for Shelton High School's Community Garden which would enhance learning and provide students with hands-on learning opportunities. **\$1,500**

Shelton Historical Society - To support restoration of the front porch that was on the Brownson House in 1913, and the evaluation, classification, cataloging, and computerization of information on each of the hundreds of articles of clothing in its collection. **\$9,500**

St. Vincent de Paul Society of Shelton, Inc. - To support an internal and external surveillance system. **\$7,069**

TEAM, Inc. - To support the relocation of the Elderly Services Department to the Richard O. Belden Cultural Community Center. **\$10,000**

Community Investments



Town of Seymour - Recreation Department - To support a Senior Fit, Senior Strong exercise program for elderly residents. **\$2,400**

Valley Shakespeare Festival - To support the Community Touring program to the entire Lower Naugatuck Valley. **\$2,500**

Wesley Heights, Inc. - To support assisted living services to low income, elderly residents in the Middle Court apartments. **\$10,000**

Community Grants

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

Adam Wysota Foundation - To support a Memorial Garden and Walkway, with beautiful plantings at Adam's House. **\$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 fifty families in need. **\$2,000**

City of Derby, Bureau of Youth Services - To support a program to prevent sexual assault and violence among youth. **\$2,306**

Derby High School PTO - To support the purchase of a printer for the school library. **\$1,250**

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

Friends of the Ansonia Library - To support digitizing the Valley Sentinel newspaper from microfiche to a searchable web format which can be viewed, studied, preserved and appreciated securely on the internet. **\$2,500**

Southford Falls Quilters LLC - To support enhancing fiber arts and design knowledge in quilting through classes, workshops, speakers and instructors for members and the public. **\$2,500**

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

Sponsorship Grants

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

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

Ansonia High School

- To sponsor a post prom event. **\$750**
- To sponsor a Fall State Program. **\$500**

Ansonia Public Schools - To sponsor the Valley Shakespeare Festival performance of "The Comedy of Errors" for Ansonia Middle School students. **\$1,000**

Ansonia Rotary Club - To sponsor the annual Civic Awards dinner. **\$300**

Ansonia School Readiness - To support the 16th Annual Ansonia Kick-Off to Kindergarten registration. **\$1,000**

Area Congregations Together, Inc.

- To sponsor the 20th Annual Walk for the Hungry and Homeless. **\$1,000**
- To sponsor Food Trucks in the Valley. **\$1,000**

BHcare

- To sponsor the annual Community Champions and annual educational workshop. **\$1,000**
- To sponsor the 29th Annual Bowl-2-Benefit the Umbrella Center for Domestic Violence Services. **\$1,000**
- To sponsor My Sister's Place Thrift Store 2nd Annual Fashion Show. **\$500**



Community Investments

Boy Scout Troop 3 Derby - To sponsor the 93rd Annual Scout Gang Show. **\$500**

Boys & Girls Club of the Lower Naugatuck Valley

- To sponsor the The John “Red” Larsen Golf Classic. **\$500**
- To sponsor the 16th Commodore Hull Thanksgiving Day 5K Road Race. **\$2,500**

Celebrate Shelton

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

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

Central Connecticut Coast YMCA - To sponsor the Valley YMCA 9th Annual Sunset 5K & 2 Mile Fitness Walk. **\$2,500**

Derby Green Market Farmers’ Market - To sponsor the Farmers’ Market. **\$500**

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

Derby Historical Society

- To sponsor Celebrate CT Libations, a fundraiser for the Restoration Project of the David Humphreys House and Museum. **\$850**
- To sponsor the Annual Silver Tea. **\$500**
- To sponsor the 27th Annual Appeal Reception. **\$850**

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

First Baptist Church - To sponsor Honoring Ansonia Blue, an Ansonia Police Dept. Appreciation Day and Fundraiser. **\$500**

Friends of the Ansonia Nature Center (FANCI)

- To sponsor an Earth Day Celebration. **\$250**
- To sponsor Autumn Fest. **\$500**

Greater Bridgeport Symphony Society, Inc - To sponsor the “GBS Celebrates Spring” concert. **\$250**

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

Irving School

- To sponsor a school wide field day. **\$1,000**
- To sponsor the 1st Annual Derby District Elementary School Math Super Bee. **\$700**

Jane Doe No More

- To sponsor the 10th Anniversary Gala. **\$500**
- To sponsor the Who’s Your Caddy? Women’s Golf Tournament. **\$250**

Junior Achievement of Western Connecticut, Inc.

- To sponsor the 7th Annual High School Business Challenge. **\$1,000**
- To sponsor a Job Shadow Event at Griffin Hospital. **\$1,000**

Liberian Community Association of Connecticut - To sponsor a marathon, sporting activities, and a dinner dance. **\$250**

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

Lower Naugatuck Valley Parent Child Resource Center - To sponsor the 6th Annual Pedal for PCRC. **\$1,000**

Master’s Table Community Meals Inc. - To sponsor the 2nd Annual Fundraiser, “At the Hop”. **\$500**

Naugatuck Valley Emends Lead (NauVEL) - To sponsor the distribution of Control & Healthy Homes Program brochures. **\$1,000**

North Star - To sponsor a Summer Picnic and Holiday Party. **\$2,000**

Northeast Organic Farming Association of Connecticut, Inc. - To sponsor the 35th Annual Winter Conference. **\$1,000**

Oxford Cultural Arts Commission - To sponsor Oxford’s Festival of Arts, Culture (FACE). **\$500**

Community Investments



Oxford Historical Society, Inc. - To sponsor a Celebration commemorating the 75th Anniversary of the first live jump with a nylon parachute. **\$600**

Oxford Land Trust, Inc. - To sponsor the Run the Rock/Hike. **\$1,000**

Polish American Foundation of Connecticut, Inc. - To sponsor the 5th Annual International Folk Dance Festival. **\$250**

Pumpkin Festival Association - To sponsor the 52nd Annual Pumpkin Festival. **\$250**

Seymour Christmas Parade Association - To sponsor the 45th Annual Seymour Christmas Parade. **\$1,000**

Seymour Founders' Day Association Inc. - To sponsor the 8th Annual Seymour Founders' Day. **\$2,500**

Seymour High School - To sponsor programs that create awareness about the responsibility of driving. **\$1,000**

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

Seymour Historical Society - To sponsor the Historical Society's 2017 educational speaker series. **\$2,500**

Seymour Pink, Inc. - To sponsor the 6th Annual Pounding the Pavement for Pink 5K run/walk. **\$2,500**

Shelton Exchange Club Foundation, Inc. - To sponsor the Annual Golf Tournament. **\$250**

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

St. Joseph High School - To sponsor a post prom event. **\$750**

St. Mary St. Michael School - To sponsor the 9th Annual Housy River Duck Race. **\$500**

TEAM, Inc.

- To sponsor the 10th Anniversary of Men who Cook. **\$1,000**
- To sponsor RunWay For Meals Intergenerational Fashion Show and Luncheon. **\$1,000**
- To sponsor the 13th Annual Toys 4 Kids holiday toy drive program. **\$1,000**

The Mary A. Schmecker Turtle Shell Fund - To sponsor Soupstock Music & Arts Festival. **\$1,000**

Treasured Time

- To sponsor the 4th Extra Innings Softball Marathon. **\$500**
- To sponsor the Treasured Time Holiday Shopping Extravaganza Fundraising Event. **\$250**

United Methodist Homes - To sponsor the Enchanted Trick or Treat Trail and fall activities. **\$500**

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

Valley Early Childhood Regional Council - To sponsor Read Across The Valley. **\$1,500**

Valley Shakespeare Festival - To sponsor the 4 free outdoor performances of Twelfth Night or What you Will. **\$2,500**

Valley United Way - To sponsor the Annual Meeting, the Community Campaign Kickoff Event, and the biannual Harvest House Event. **\$2,500**

"This is a great way to enrich the Valley and keep money local while we try to broaden the horizons and create life-changing experiences for the youth of our community."

- Marc Garofalo



Community Investments

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

Jack Walsh - Grants to the Valley United Way and Valley Independent Sentinel

Gold Seal Awards - Valley Chamber of Commerce

Tom Haynes (Gold) - Grant to the Lower Naugatuck Valley Parent Child Resource Center

Ray Oppel (Gold) - Grant to TEAM, Inc.

Diane Stroman (Platinum) - Grants to the Boys & Girls Club of the Lower Naugatuck Valley & TEAM, Inc.

Valley Independent Sentinel (Silver) - Grant to the Derby Public Schools

Joseph Welsh (Gold) - Grant to the Shelton Land Conservation Trust



L to R: George Mitchell, Sikorsky/Chamber Board Chairman, Ethan Fry, Valley Independent Sentinel (Silver), Eugene Driscoll, Valley Independent Sentinel (Silver), Diane Stroman, TEAM, Inc. (Platinum), Joseph Welsh, Aquarion (Gold), Ray Oppel, Raymond A. Oppel CPA, LLC (Gold), Tom Haynes, Haynes Construction (Gold), Ramon Peralta, Peralta Design/Emcee

Good Scout Award - Housatonic Boy Scout Council

Dworkin, Hillman, Lamorte & Sterczala - Grant to the Housatonic Council, BSA

Dr. John Ireland Howe Award - Derby Historical Society

Diane Stroman - Grant to the Julian Taylor Scholarship Fund

Raymond P. Lavietes Service to Youth Award

Joseph Pagliaro, Jr. - Grant to Boys & Girls Club of the Lower Naugatuck Valley

Susan "Sooz" DeLeon - Grant to the Boys & Girls Club of the Lower Naugatuck Valley

Women Making a Difference - Valley Women's Health Initiative

Jodi Dawley - Grant to Griffin Hospital Development to support the Valley Goes Pink

Donna Hayes - Grant to Griffin Hospital Development to support the Valley Goes Pink

Tammy Link - Grant to St. Mary-St. Michael School

Sheila Riley - Grant to Big Brothers/Big Sisters of Southwestern CT

Dawn Supranovich - Grant to Seymour Pink Endowment Fund at VCF

Karen Spargo - Grant to the Valley Breast Health Care Fund at VCF

In Recognition for their Service

Daun Barrett - In recognition of her retirement from Griffin Hospital. Grant made to TEAM, Inc.

Karen Spargo - In recognition of her retirement from the Naugatuck Valley Health District. Grant to Naugatuck Valley Health District

TEAM, Inc. - For creative and innovative promotion of The Great Give® 2017

Sabrina Maldonado - In honor of winning the 2017 CT State Youth of the Year from the Boys and Girls Club and moving onto the Regional finals. Grant to the Boys & Girls Club of the Lower Naugatuck Valley

Community Investments



Donor Advised Grants

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

Ansonia Rescue Medical Services
 Area Congregations Together, Inc.
 BHcare
 Boy Scout Troop 3 Derby
 Boys & Girls Club of the Lower Naugatuck Valley
 Center Stage Theatre Inc.
 Charlotte's Web of Prayer
 Christ Episcopal Church
 City of Derby
 Clark Memorial Library
 Connecticut Forest & Park Association
 Connecticut Hospice, Inc.
 Derby Historical Society
 Dimatteo Family Charitable Foundation Inc.
 The Foundation School
 Friends Center for Children, Inc.
 Girl Scouts of Connecticut Inc.
 Greater Valley Chamber of Commerce
 Griffin Hospital
 Housatonic Council, Boy Scouts of America
 IRIS - Integrated Refugee & Immigrant Services
 Kids for Kids, Dancing for Life
 Long Hill Burial Ground Ltd.
 Mishkan Israel Day Camp
 National Right to Work Legal Defense and Education Foundation, Inc.
 Recreation Camp Inc.
 Seymour High School



Shelburne Farms
 Shelton High School
 Shelton Historical Society, Inc.
 Shelton Land Conservation Trust
 Shelton Public Schools
 St. Vincent de Paul Society of Shelton, Inc.
 Susanna Wesley School
 TEAM, Inc.
 University of New Hampshire
 University of New Haven
 Valley United Way
 Valley YMCA
 VARCA
 Working Lands Alliance

Designated Grants and Organization Fund Transfers

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

Ansonia Public Schools
 Assumption Church
 Boys & Girls Club of the Lower Naugatuck Valley
 Central Connecticut Coast YMCA
 City of Derby
 Connecticut Agricultural Experiment Station
 Derby Public Library
 Greater Valley Chamber of Commerce
 Griffin Hospital
 Housatonic Council, Boy Scouts of America
 Lower Naugatuck Valley Parent Child Resource Center
 Oak Cliff Cemetery Association
 Oxford High School
 Planetree, a Subsidiary of Griffin Health Services, Inc.
 Recreation Camp Inc.
 Seymour Pink, Inc.





Community Investments

Shelton High School
 St. Mary's Church
 Storm Engine Company Ambulance Corps, Inc.
 TEAM, Inc.
 Town of Seymour
 Trinity Cemetery Association
 Trinity Episcopal Church
 Woodbridge Town Library

Scholarships

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

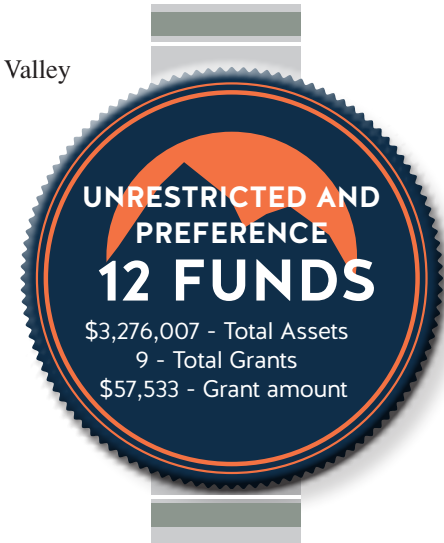
Academy of Our Lady of Mercy, Luralton Hall
 Amity Regional High School
 Ansonia High School
 Assumption School
 Boys & Girls Club of the Lower Naugatuck Valley
 Bunnell High School
 The Culinary Institute of America
 Delaware Valley University
 Derby High School
 Derby Public Schools
 Emmett O'Brien Regional Technical School
 Fairfield University
 Hamden High School
 Naugatuck Valley Community College
 Oxford High School
 Sacred Heart University
 Salve Regina University
 Seymour High School
 Shelton High School
 Southern Connecticut State University
 St. Joseph Parish - Angel Fund
 University of Bridgeport
 University of Connecticut
 University of New Haven
 University of Rhode Island
 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.

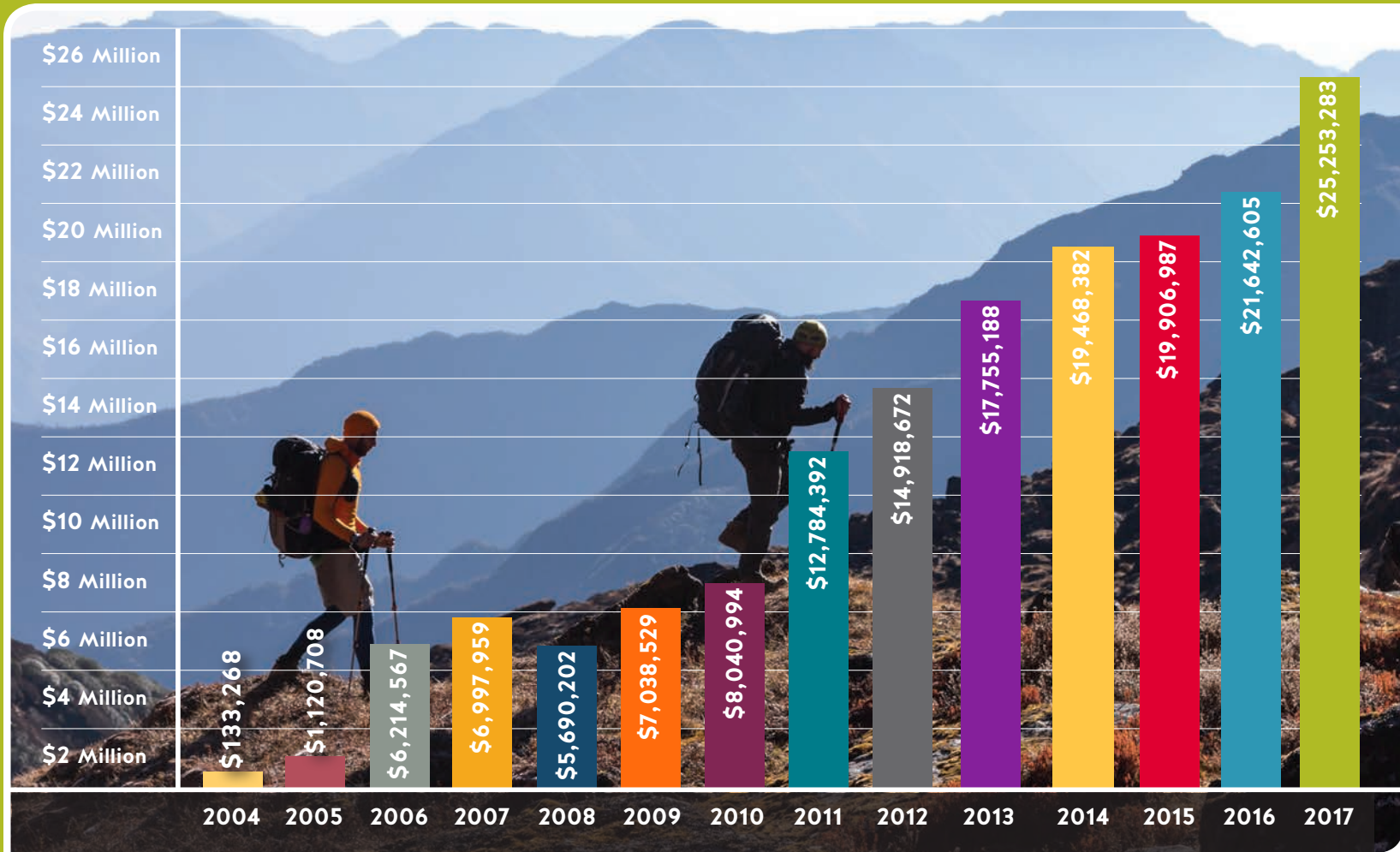
Area Congregations Together, Inc.
 BHcare
 Boys & Girls Club of the Lower Naugatuck Valley
 Catholic Charities
 Central Connecticut Coast YMCA
 Derby Historical Society



"We are hopeful that we can work with the schools and teachers in Ansonia each year to determine enrichment experiences we can help provide that the students otherwise wouldn't be able to receive."

- Colleen Rondon

Asset Growth



2017

Stewardship of Charitable Assets

Stewardship of the Valley’s assets generated positive net investment returns in excess of the market benchmarks designed to assess its performance.

The Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF) have been affiliated for the past 14 years, and the assets entrusted to VCF since 2004 have been managed through TCF. Access to TCF’s comingled investment management program through TCF’s Corporation, which has been a Connecticut registered investment adviser since 2014, affords VCF the benefits of a diverse, long-term and global endowment model provides for exposure to over 40 world-class sub-advisors across 10 asset classes.

VCF is pleased to report a return of 18.6%, net of the expense of managing the Commingled Fund, against the market benchmark of 15.5% for the year ended December 31, 2017. Equally important is that, since VCF’s inception 14 years ago, the endowment has experienced an annualized return of 8.9%, net of expenses, versus the market benchmark of 7.3% while managed under the Commingled Fund.



Bill Nimons



Raymond Oppel

“Now that my term on the VCF Board of Directors has concluded at the end of 2017, I am pleased to introduce and welcome Raymond Oppel, CPA as the new Treasurer and Finance Committee Chair. It is with great confidence that I pass the torch to such a well-qualified individual with a long history of taking on so many community endeavors in the Valley. Ray will begin serving in this capacity in January 2018.”

- Bill Nimons

INVESTMENT PERFORMANCE

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

	TRAILING 1 Year	TRAILING 3 Year	TRAILING 5 Year	TRAILING 7 Year	TRAILING 10 Year
Actual Results	18.6	8.3	10.5	9.3	6.5
Market Benchmark¹	15.5	6.7	7.8	7.3	4.1
Value Added	3.1	1.6	2.7	2.0	2.4

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

Past performance is no indication of future results.



Fiscal 2017 in Review



FINANCIAL POSITION

	2017	2016
ASSETS		
Cash and cash equivalents	357,996	483,107
Investments at market value - component funds	18,077,028	14,144,741
Investments at market value - organization funds	6,702,681	5,728,229
Total investments	25,137,705	20,356,077
Contributions receivable	22,729	1,200,000
Other assets	22,755	4,196
Furniture and equipment, net	70,094	82,332
Total Assets	25,253,283	21,642,605
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable and accrued expenses	59,687	7,637
Organization funds	6,702,681	5,728,229
Grants payable	194,250	276,250
Total liabilities	6,956,618	6,012,116
Unrestricted Net Assets	18,296,665	15,630,489
Total Liabilities and Net Assets	25,253,283	21,642,605

"We want to honor our parents for all that they have done by giving back to the community they loved so dearly."

- Royal Wells

STATEMENT OF ACTIVITIES

	2017	2016
Revenue, Gains and Other Support		
Contributions	2,011,272	3,038,552
Less transfers to organization funds	(120,051)	(90,274)
Net contributions	1,891,221	2,948,278
Investment gain, net	2,568,381	580,381
Total revenue, gains and other support	4,459,602	3,528,659
Expense		
Grants and distributions approved, net	1,438,813	1,449,233
Grants for program management and direct grant activities	317,848	309,061
Total grants expense	1,756,661	1,758,294
less distributions from organization funds	(175,132)	(168,559)
Net grant expense	1,581,529	1,589,735
Development, donor services and fund stewardship	132,436	128,776
Management, leadership and operations	79,461	77,267
Total administration expense	211,897	206,043
Total expense	1,793,426	1,795,778
Increase in Net Assets	2,666,176	1,732,881
Net Assets - Beginning of Year	15,630,489	13,897,608
Net Assets - End of Year	18,296,665	15,630,489

"Having a reserve fund at VCF allows money to be invested while we continue our efforts to build support for a farm in our community."

- Cathy Foole



2017 Councils, Committees and Volunteers



Board of Directors

Alan Tyma, *Chair*
 Lynne Bassett Perry, *Vice Chair*
 Bill Nimons, *Treasurer*
 Don Smith, Jr., *Secretary*
 William Ginsberg
 Robert Lesko
 Jennifer Magri
 Francis Michaud Jr.
 Ray Oppel
 Fred Ortoli
 Angela Powers
 Jimmy Ryan
 Marianne Symthe
 Diane Stroman

Board Advisory Council

Bill Bassett
 Gail Catlin
 Jamie Cohen
 Susan Coyle
 Maryanne DeTullio
 Nancy Dickgiesser
 Tim Dillon
 Rick Dunne
 Peter Francini
 Dave Grant
 James Hodge
 Liz Kennard
 Ernestine Luise
 Michael Marcinek
 Susan Mauriello
 Ned Miller
 Bill Miller, Jr.
 Aleta Miner
 Dan Onofrio
 Ellen Pagliaro
 Joseph Pagliaro, Jr.
 Mary Pepe
 Kathy Riddle
 David Rifkin
 Ed Santa

Kenneth Schaible
 Janice Sheehy
 Angelika Stamos
 Gregory Stamos
 Fred Stanek
 Karen Stanek
 Thomas Sutnik
 Leon Sylvester
 Pat Tarasovic
 Robert VanEgghen
 Jack Walsh
 Thomas Welch
 John Zaprzalka

Development Committee

Jennifer Magri, *Co-chair*
 Marianne Smythe, *Co-chair*
 Robert Lesko
 Francis Michaud, Jr.
 Lynne Bassett Perry
 Kathy Riddle
 Diane Stroman
 Alan Tyma

Program Committee

Lynne Bassett Perry, *Chair*
 Robert Lesko
 Bill Nimons
 Ray Oppel
 Jim Ryan
 Donald Smith, Jr.
 Alan Tyma

Community Grants Members

Liz Kennard, *Chair*
 Janice Bonaparte
 Beth Carson
 Jen Champagne
 Martha Dulla

Richard Knoll
 Aleta Miner
 Dan Onofrio
 Fred Ortoli
 Ray Oppel
 Angelika Stamos
 Jack Walsh

Responsive Grants Community Reviewers

Leon Bailey
 Marilyn Cormack
 Kathleen Cosgrove
 Robin DeJesus
 Martha Dulla
 Marc Garofalo
 Ed Kisluk
 Richard Knoll
 Gregory Stamos
 James Tickey
 Jack Walsh

Finance Committee

Bill Nimons, *Chair*
 Francis Michaud, Jr.
 Ray Oppel
 Diane Stroman
 Alan Tyma

Governance Committee

Don Smith, Jr., *Chair*
 Jennifer Magri
 Jim Ryan
 Alan Tyma

2018 VCF Board and Staff



Standing Left to Right – Jimmy Ryan, Beth Colette, James Hodge, Jr., Marianne Smythe, Angela Powers, John Ready, Valerie Knight-Di Gangi, Jen Magri, Andrew Alden, Fred Ortoli, Francis Michaud, Jr. *Seated Left to Right* – Raymond Oppel, Lynne Bassett Perry, Alan Tyma, Sharon Closius, Donald Smith, Jr., Jack Walsh *Not pictured* – Rob Lesko

VCF thanks the following outgoing Board members:



Will Ginsberg



Bill Nimons



Diane Stroman

Partners in Philanthropy

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

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

Your Impact, Made Easy - Establishing a Fund at VCF



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

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

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

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.



