



2004 ANNUAL REPORT



THE COMMUNITY FOUNDATION
of Southeastern Connecticut

THE MISSION STATEMENT OF THE COMMUNITY FOUNDATION

THE COMMUNITY FOUNDATION'S MISSION IS TO CONNECT DONORS WITH OPPORTUNITIES THAT PROMOTE THE COMMON GOOD OF THE RESIDENTS OF SOUTHEASTERN CONNECTICUT. WE ENCOURAGE LOCAL PHILANTHROPY AND AWARD GRANTS AND SCHOLARSHIPS BY BUILDING A PERMANENT ENDOWMENT FOR THE COMMUNITY.

On the cover, Making music at “The Drop,” The Drop in Learning Center in 2004.

2004 ANNUAL REPORT

SERVING THE TOWNS OF
EAST LYME • GROTON • LEDYARD • LYME • MONTVILLE
NEW LONDON • NORTH STONINGTON • OLD LYME • SALEM
STONINGTON • WATERFORD

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From the Chairman and the President:



Alice Fitzpatrick and Tim Bates

Gilda Radner used to say: “If it’s not one thing, it’s another”. That certainly applies to the community we share along the shoreline of southeastern Connecticut. We all crave prosperity and growth, and the economic figures show we’re doing pretty well in a post 9/11, uncertain world. The stock market performed fairly well in the past two years; housing prices are strong; unemployment is fairly low; tourism is good; inflation is creeping, but slowly. So why aren’t we dancing in the streets?

Perhaps it’s because our needy are needier, school performance keeps slipping, congestion is worsening and social contention seems to be rising. Not to mention the possible closing of the Groton Sub Base. The gap between the haves and have nots is widening.

As a Community Foundation, we have to ask ourselves: “What do we have to show for more than 20 years of fundraising, grant making, convening, and promoting philanthropy?”

One answer is that, we have raised a lot of money since 1983, with permanent assets approaching \$25 million. Our recovery from the market slump of 2001 and 2002 has been achieved with all deliberate speed and a highly diversified investment strategy. Our portfolio grew by 18% in 2003 and over 10 % in 2004. Secondly, we have distributed many grants and scholarships, averaging more than \$1 million a year for the past 5 years, despite market fluctuations. We routinely put our confidence in the rich blend of non-profit organizations that improve lives throughout our eleven towns. We’ve also benefited from the collective wisdom of more than 150 trustees who are dedicated leaders in the community. They have taught us a lot about good stewardship and we have taught them a lot about where the problems lie that need our attention.

In addition, many generous donors have taught us a lot:

► One family (Bill & Shelley White of Stonington) made a substantial gift here in 1984... the largest donation we had ever seen to that point and our first Donor Advised

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from the chairman and the president

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Fund. In 20 years, they have distributed more than the amount of the original gift AND the value of their fund here has more than doubled! A new generation of Whites is now involved in the grants process and 20 or more organizations that the family treasures continue to receive their help.

► Another family (The Malloves of New London) began a memorial fund here in 1990 when hundreds of tribute gifts poured in to honor their paterfamilias. The family runs a golf tournament each year in his honor and donates all proceeds to their unrestricted fund here, which has grown to more than \$100,000. This fund has made grants of \$50,000 and also supports the day-to-day operations of the Foundation.

► The Women & Girls Fund, started as a collective effort in 1999, does not emphasize individual gifts yet has generated more than a million dollars in contributions over five years. It has become an entrenched movement of sorts, focused now on stemming the

*Arts and education, health and human services, environmental and civic causes will always require the **personal investment and generosity** of a host of community members. We strive to make that a satisfying and worthwhile experience for each giver and receiver.*

surge in teen pregnancy and domestic violence in southeastern Connecticut.

► Let's Read is another example of the power of healthy "group think". We are making a big difference in the lives and literacy of as many as 5000 local children, by fostering a gathering storm of support for innovative, up-close-and-personal reading programs. Climb aboard!

► In 2004, our most unusual gift was from the Department of

Environmental Protection (DEP). They endowed a fund that will perpetually provide educational programs at Barn Island Nature Preserve in Stonington. This was their way of following the wishes spelled out in a bequest from Sarah Ann Martin, of Old Saybrook, CT. She wanted to preserve the threatened tidal wetlands of this area and donated her house and property to the State for this purpose. The proceeds from the sale helped secure and protect additional wetlands on Barn Island. The remaining funds will support environmental education projects there forever.

Now we have more than 200 individual funds. Their pattern is the same, even though the inspiration for them may differ. They are fed by an impulse to make good things happen in one's own backyard. One family or one person or one organization can make a societal difference by attending to this kind of wise, prudent philanthropy. In this Annual Report we will show you some of the impact of our work, and some of the lives we have touched along the way.

One lesson we've learned is that "If it's not one thing, it's another". Arts and education, health and human services, environmental and civic causes will always require the personal investment and generosity of a host of community members. We strive to make that a satisfying and worthwhile experience for each giver and receiver. Our thanks to you all.



Alice Fitzpatrick, President



Tim Bates, Chairman



2004 highlights

Playground at Toby May Field. Centennial project of the New London Rotary Foundation.

THE ELAINE PEARL SHAPIRO AND MICHAEL SHAPIRO CHARITABLE FUND

M

ichael and Elaine Shapiro knew what they wanted to do, for now and for the future. The Community Foundation of Southeastern Connecticut made it possible for them to do

it, with the establishment of **The Elaine Pearl Shapiro and Michael Shapiro Charitable Fund**, a donor-advised fund.

Right now, the fund lets the Shapiros support programs that matter to them in New London, a city that they love. Eventually, through their estate planning, this same fund will provide for a mix of charities, both local and national, that they have named.

“You want to do something good with what you’ve worked for. Especially, you want to make a positive impact on your community. The need in the community is so great.”

“You want to do something good with what you’ve worked for,” says Elaine. “Especially, you want to make a positive impact on your community. The need in the community is so great.”

The Shapiros began thinking out the “how’s” and “what’s” of their giving after they attended an annual meeting of the Foundation and then talked with Foundation staff. At first, Elaine notes, she felt that she was in unfamiliar territory—but that feeling didn’t last. The meeting was informative; the staff was helpful. “I took notes,” she says. “I learned questions to ask, and I saw how easily people can get involved.”

After learning about different kinds of funds, she and Michael chose the donor-advised variety, for its convenience and flexibility. Each

year they can select from the Community Foundation’s list of giving opportunities or direct funds to causes of their own choice.

They feel comfortable with the Foundation’s knowledge and experience—with its good investment record, its sound management practices, and its thorough understanding of the community and its needs. They like the way they can communicate with the staff, and, if they wish, become more involved. Elaine hopes to serve on a Foundation committee.

They are pleased to leave a lasting legacy. “The fund will give continually, over and over, for years and years. It will grow—grow and help,” Elaine says.

One way to help the whole community, she notes, is to help its young people. This year the Shapiros’ gift will support the Connecticut Teen Peace/New London Youth Organization’s new teen center and the Kente Cultural Center’s launch of a multi-cultural, multi-ethnic chorus for 9-to-15-year-olds. “Teens need a place to go, to hang out, to be—a place that’s safe,” Elaine says, and the chorus is such a great idea.” She can’t wait to hear the group perform.

The Shapiros want to give back to a community that has given them so much. When they were growing up, their families summered in New London. “We met at Ocean Beach,” Elaine says, with a big smile. “Then, in 1986, we re-met.” Today, they’re delighted to live where the Thames River meets Long Island Sound.

“We like it here,” says Michael. “It’s where we hang our hats. Our fund is not about the Shapiros; it’s a remembrance of so much we’ve enjoyed here. To do some good—that’s the key.”



Michael Shapiro and Elaine Pearl Shapiro

grants 2004

THE COMMUNITY

FOUNDATION AWARDS

\$450,191

IN GRANTS FOR 2004

ARTS & CULTURE

Colonial Theatre School	\$7,500
Shakespeare in Schools program	
Connecticut Early Music	\$1,350
Two free concerts in schools	
Eastern Connecticut Symphony Orchestra . . .	\$12,500
Children's concerts at the Garde	
Eugene O'Neill Theater Center	\$9,000
"Art of the Set" retrospective exhibit	
Lyme Academy College of Fine Arts	\$10,000
Art Reach Scholarship program	
Mystic Ballet	\$3,700
Ballet classes for NL youth	
Summer Music	\$7,500
Support of Mozart concert	
TOTAL	\$51,550

AFTER-SCHOOL & SUMMER

Boys and Girls Club of Southeastern Connecticut	\$10,000
"Project Learn -- Summer Clubhouse"	
Child & Family Agency of Southeastern CT . . .	\$8,500
BP Learned Mission Summer Program	
Children's Museum of Southeastern Connecticut	\$7,500
Educational programs on child health and wellness	
Drop-In Learning Center	\$2,000
Arts programs	
Kente Enterprises	\$4,800
"Male to Male" mentoring program	
New London Community Boating	\$3,500
Sailing scholarships	
New London Maritime Society, Inc.	\$1,500
Development of after school program	

Office of Youth Affairs	\$4,000
"Teens Off the Hook" field trips	
Project Oceanology	\$4,200
Scholarships for Ocean Camp	
Stonington Community Center	\$5,000
After-school program support for at-risk youth	
Virtual Voyages	\$2,500
Boating program for New London county youth	
YMCA of Mystic	\$5,000
Boating and equipment for summer programs	
TOTAL	\$58,500

CIVIC

Mystic & Noank Library	\$1,911
Computer	
New London Main Street	\$2,000
Software for membership and donor management	
Old Lyme/Phoebe Griffin Noyes Library	\$2,000
Children's homework center	
Rotary Club of New London Foundation	\$5,000
Fully accessible playground	
Sail New London	\$10,000
Support of Boats, Books & Brushes festival	
Save Ocean Beach	\$5,000
Aquatic playground	
Stonington Free Library	\$4,000
Computers for public use	
TOTAL	\$29,911

EDUCATION

Community Coalition for Children	\$6,000
Community lecture and workshops for parents of teens	
Connecticut Storytelling Center	\$9,500
Storytelling program in the NL elementary schools	
Eastern Connecticut Ballet	\$4,950
Pre-Nutcracker assemblies	

Historically Black College Alumni	\$4,000
Black College Tour	

Interdistrict School for Arts and Communication	\$10,000
Support Team-teaching classroom to increase school capacity	

Junior Achievement of southwest New England	\$12,500
Economics of Staying in School program	

Literacy Volunteers of America	\$12,500
Development of program partnerships to expand literacy services	

Mitchell College	\$12,500
Financial aid for local students	

Mystic Art Association	\$11,000
Visual Thinking Curriculum teacher training for special needs students	

Riverfront Children's Center	\$3,400
Building renovations	

TOTAL	\$86,350
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ENVIRONMENT

Avalonia Land Conservancy	\$12,500
Pine Swamp Wildlife Corridor purchase	

Denison Pequotsepos Nature Center	\$5,000
Display of new collection	

Wood-Pawcatuck Watershed Association	\$12,000
Shunock River environmental assessment	

TOTAL	\$29,500
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HEALTH

Alliance For Living	\$5,000
Nutrition and fitness program for clients	

American Red Cross	\$8,300
CPR/AED training in southeastern Connecticut	

Community Partnerships	\$7,500
Child passenger safety seat outreach	

High Hopes Therapeutic Riding	\$6,000
Therapeutic riding program for special needs children	
LEARN	\$8,650
Community-wide initiative to improve childhood health	
Ledge Light Health District	\$8,250
Program to improve dental health of children	
Montville Senior Center	\$5,000
Montville seniors health program	
Planned Parenthood of Connecticut	\$5,000
Health services for uninsured patients	
TOTAL	\$53,700

SOCIAL SERVICES

A Moveable Feast	\$3,200
Home-delivered meals to people in crisis	
Care and Share Soup Kitchen	\$2,000
Food and supplies for free community meals	
City of New London - Dept. of Health & Social Services	\$8,136
Winter emergency homeless shelter	
Connecticut Legal Services	\$12,500
Program to aid child victims of domestic violence	
First Step	\$1,785
Industrial refrigerator	
H.O.P.E.	\$7,500
Renovations to home on Belden Street	
Martin House	\$5,764
Supported employment program	
New London Community Meal Center	\$5,000
Renovations to facility	
Opportunities Industrialization Center (OIC)	\$7,500
Job training program	

United Community & Family Services	\$5,000
Parent aide program for low-income families in New London County	
United Way of Southeastern Connecticut	\$12,500
Project Warm-Up heating oil assistance	
W.A.R.M. Shelter	\$5,000
Care for homeless in New London County	
Waterford Country School	\$7,500
Theater arts program	
TOTAL	\$83,385

**GRAND TOTAL
COMPETITIVE GRANTS \$392,896**

grants from designated funds

American Red Cross	\$500
Child & Family Agency of Southeastern CT	\$500
Children's Museum of Southeastern Connecticut	\$500
Community Foundation of Southeastern Connecticut	\$1,095
Hospice of Southeastern CT	\$1,600
Lawrence & Memorial Hospital	\$1,000
Literacy Volunteers of America	\$430
Lymes' Youth Service Bureau	\$360
Mystic Seaport Museum	\$10,000
Mystic & Noank Library	\$430
New London United Methodist Church	\$1,100
Noank Historical Society	\$430
Old Lyme Day Care	\$360
Pine Point School	\$4,000
Public Library of New London	\$1,486
Salvation Army	\$1,100
St. Pauls Church	\$484
Town of Lyme/Hartman Park	\$1,000
The Visiting Nurse Association of SE CT	\$15,000
Waterford Public Library	\$15,420
West Farms Land Trust	\$500

TOTAL DESIGNATED GRANTS \$ 57,295

Collaborative Initiative for Management Assistance Grants

For a sixth year, the Foundation, along with the United Way of Southeastern Connecticut and the Frank Loomis Palmer Fund of Bank of America, made grants for capacity building. The Collaborative Initiative for Management Assistance (CIMA) has made more than fifty grants to help local organizations with board development, strategic planning, marketing and other areas.

New London County ARC	\$2,625
Strategic plan update	
East Lyme Youth Services Association	\$6,000
Strategic planning	
Science EpiCenter	\$2,083
Organizational assessment	
Stonington Community Center	\$5,625
Strategic planning	

TOTAL CIMA GRANTS \$16, 333

grants from donor advised funds

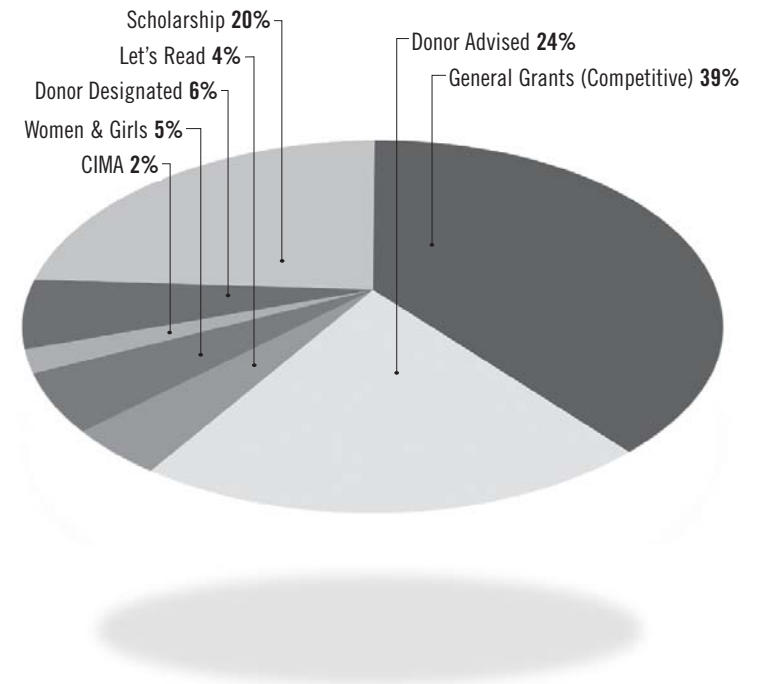
THESE ORGANIZATIONS
REPRESENT THE
INTERESTS OUR DONORS
SUPPORT THROUGH THEIR
DONOR ADVISED FUNDS

American Cancer Society	Literacy Volunteers of America
American Red Cross	Lyman Allyn Art Museum
Animal Welfare League of New London County	Lyme Ambulance Association
Avalonia Land Conservancy	Lymes' Youth Service Bureau
Avodah Dance Ensemble	McCurdy-Salisbury Education Foundation
Boy Scout Troop 33	Mitchell College
Boy Scouts of America	Monte Cristo Cottage
Bulkeley Alumni Association	Mystic Area Shelter And Hospitality
Central American Medical Mission	Mystic Congregational Church
Child & Family Agency of Southeastern CT	Mystic Seaport Museum
CLASP Homes, Inc.	The Nature Conservancy
Connecticut College	New England Dollars for Scholars
Connecticut Food Bank	New London Adult and Continuing Education
Connecticut Humane Society	New London Community Meal Center
Connecticut Urban Legal Initiative	New London Community Boating
The Cornell Fund	New London County Historical Society
Covenant Shelter of N.L., Inc.	New London Firefighters
Denison Pequotsepos Nature Center	New London Main Street
Dr. Martin Luther King Memorial Scholarship	New London Public Schools
Eastern Connecticut Symphony Orchestra	Noank Baptist Church
First Step, Inc.	New London Office of Youth Affairs
Garde Arts Center	Old Lyme/Phoebe Griffin Noyes Library
Habitat for Humanity of Southeastern CT	Pequot Chapel
Haitian Health Foundation	Public Library of New London
Hampton Institute	New London Rotary Foundation , Inc.
High Hopes Therapeutic Riding, Inc.	Salt Marsh Opera Co.
Hospice of Southeastern CT	Salvation Army
Kingswood-Oxford School	Science EpiCenter
L.A.M.B.S. Club	Special Olympics Connecticut
Lawrence & Memorial Hospital	St. Anne's Episcopal Church
LEARN	St. Francis House

St. James Church
St. Mary's Catholic Church
Stonington Ambulance Fund
Stonington Community Center
Stonington Free Library
Stonington Village Improvement Association
United Community & Family Services
United Way of Southeastern Connecticut
University of Delaware

Virtual Voyages, Inc.
The Visiting Nurse Association of SE CT
W.A.R.M. Shelter
Waterford Ambulance Association
Waterford Country School
Women's Center of Southeastern Connecticut
Yale University
YMCA of Southeastern Conn., Inc.

WHERE THE GRANTS GO



how to apply for a Community Foundation Grant

The Community Foundation of Southeastern Connecticut awards grants to federally recognized 501(c)(3) organizations and to other charitable, educational and civic organizations serving the towns of New London, Groton, Waterford, Ledyard, Stonington, North Stonington, Salem, Montville, East Lyme, Old Lyme and Lyme. Grants are made in the area of arts and culture, community development, education, environment, and health and social services. Grant application guidelines are available for each of the grant programs listed below. The Foundation encourages applicants to discuss their proposal ideas with the program officer after reviewing the grant guidelines.

General Grants

NOVEMBER 15 DEADLINE

Competitive grants are made to a variety of community organizations in the range of \$2,000 to \$20,000. High priorities include programs that:

- ▶ Strengthen families;
- ▶ Improve access to area resources among under-served populations;
- ▶ Enable resident to participate in the cultural life of the community;
- ▶ Demonstrate collaborative efforts and inclusive practices;
- ▶ Reinforce best practices or show innovative approaches;
- ▶ Add to the general well-being of our region.

The Women & Girls Fund

AUGUST 1 DEADLINE

The Women & Girls Fund was established to harness the vitality of women living and working in our region for the purpose of uplifting other women and girls who face challenges in their lives. Grants range from \$2,000 to \$10,000. The Fund is currently focusing on two areas:

- ▶ Preventing teen pregnancy and sexually-transmitted diseases;
- ▶ Preventing domestic violence and supporting its victims.

Let's Read (formerly Kids & Books)

MARCH 15 DEADLINE

The Foundation has launched an initiative to improve literacy skills among children in our region. Grant awards are made to libraries, schools and non-profit organizations in the range of \$2,000 to \$10,000. Preference is given to proposals that:

- ▶ Make reading cool! Generate the motivation to read among our youth;
- ▶ Foster life-long reading skills as a path to success in life;
- ▶ Address family literacy and create nurturing relationships between kids and their parents or mentors around reading;
- ▶ Target disadvantaged or under-served audiences.

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Collaborative Initiative for Management Assistance

ROLLING DEADLINE

The Community Foundation, the United Way of Southeastern Connecticut and the Frank Loomis Palmer Fund of Bank of America have joined together to offer capacity building grants. The Collaboration provides funds for organizations to work with professional consultants in the areas of organizational assessment, strategic planning, and board development.

Scholarships

APRIL 1 DEADLINE

The Foundation manages 40 scholarship funds that grant more than 100 student awards annually. Scholarship candidates must be residents of the Foundation's 11-town region, plan on attending accredited educational institutions, and are high school seniors, college or graduate students. Awards range from \$500 to \$20,000.

Guidelines and applications for grants and scholarship programs may be obtained online at www.cfsect.org or requested from the Foundation at 860-442-3572 or via e-mail at jennob@cfsect.org. Applicants may call Jennifer O'Brien, program director, to discuss application ideas or with any questions.



Residents of Thames River Family Program participate in life skills education.

women & girls fund 2004

FOUNDING MEMBERS

Ms. Pamela S. Akins
 Ms. Vicki Anderson
 Lois and Glenn C. Andrews
 Mr. and Mrs. Curtis E. Askelson
 Ms. Shirley Avery
 Ms. Virginia Bainbridge
 Ms. Bridget Baird
 Mr. Walter V. Baker
 Ms. Patricia Belcher
 Ms. Laura A. Berry
 Mr. and Mrs. Stephen Bessette
 Mrs. Marion Bigelow-Wolfe
 Mrs. Anne Bingham
 Ms. Trudi Bird
 Linda Blair
 Dr. and Mrs. Barry Bloom
 Mrs. Mary Boatwright
 Mrs. Carole Bobruff
 Neal and Jane Lassen Bobruff
 Ms. Norma Branch
 Mrs. Jane R. Bredeson
 Mrs. Helen Brewster
 Ms. Katherine Brighty
 Ms. Sandra L. Brindamour
 Ms. Mary Broderick
 Van Brown and Wanda Tillman
 Gail Brown
 Lisa H. Brownell
 Nancy Brundage and Louise Lynch
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 Patricia Butterworth
 Mrs. Beth Camassar
 Ms. Melinda Carlisle
 Ms. Jean Caron
 Ms. Maura Casey
 Ms. Sharyne Cerullo



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 Mr. and Mrs. Frank V. Church
 Ms. Susan H. Cihocki
 Ms. Sharon D. Clark
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 Mrs. Marcia H. Gardiner

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 Lorraine Grader
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 Mary Ellen Jukoski and
 Matthew McLoughlin
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 Mr. Richard Kimball and
 Rev. Anne Kimball
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 Ms. Margaret O'Brien
 Dr. Deirdre O'Connor

Ms. Betty O'Donnell
 Maureen O'Gorman
 Dr. Margaret O'Shea
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 Ms. Julie A. Olson
 Ms. Libby Orvedal
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 Mrs. Marcia T. Robinson
 Sarah Rogovin
 Ms. Amanda Rutledge
 Ms. Mary Sanderson
 Ruth Saunders and
 Jonathan White
 Mrs. Jane Schaefer
 Ms. Nan C. Scheiber
 Mr. and Mrs. Thomas E. Schellens

Mr. and Mrs. Ernest Schlesinger
 Joyce Schmidt
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 Mrs. Denise Shafner
 Ms. Leila Shakkour
 Mr. and Mrs. Edward Shapiro
 Ms. Ruth Sjursen
 Mr. & Mrs. Sherwood T. Small
 Mr. and Mrs. Laurence P. Smith
 Ms. Patricia Smith
 Dr. and Mrs. Stephen Smith
 Ms. Janis L. Solomon
 Mrs. Leah Spitz
 Ellen Spring
 Mrs. Donna Breen Stamm
 Ms. Patricia Stamm
 Sylvia Stoner
 Ms. Sally Taylor
 Pat Todd
 Ms. Claudia Turner
 Mrs. Sherry Turner
 Mrs. Barbara van der Lyke
 Susan M. Vincent
 Ms. Beth Walker
 Mrs. Eunice M. Waller
 Ms. Jane Walsh
 Mrs. Pamela Walsh
 RADM and Mrs. Thomas T.
 Wetmore, III
 Mrs. Shelley White
 Mr. and Mrs. John Whritner
 Mrs. Cynthia Willauer
 Ms. Heather Lathrop Williams
 Alison Woods
 York Correctional Institution

WOMEN & GIRLS FUND

The name came to Julie Olson as she drove home from a Community Foundation meeting. “Flash! I thought, ‘Lewis!’” she recalls.

And so, the Foundation’s new legacy society, recognizing donors whose planned gifts will support the **Women & Girls Fund** in the future, is the **Lewis Century Society**. It’s named for Harriet Richard Lewis, a 19th-century New Londoner whose caring and vision set a wonderful example.

Harriet Richards Lewis and her cohorts would meet future needs that they couldn’t have imagined.

Foundation supporters have been hearing about Lewis, who as a young woman helped found the Female Cent Society in 1810. Each week, each member contributed a penny to help women and children in need. Lewis provided for the society in her will. “She was the first legacy donor of the Cent Society,” says Olson, who researched Lewis’s life. “Her bequest became very significant.”

In 1890 the society was named the Lewis Cent Society, and over the years others—both men and women—provided for it in their wills. Often their bequests were modest ones. “But small things add up over time,” Olson says. Eventually, income from their bequests covered much of the society’s aid to women and children.

Needs change; in the early years, the Cent Society’s aid included providing cloth to women, so they could support their children by sewing. But with their bequests, Harriet Richards Lewis and her cohorts would meet future needs that they couldn’t have imagined.

“Their generosity is still working,” Olson reminds. In 1999, Cent Society members turned their endowment over to the Foundation to manage, and in doing so helped launch the Women & Girls Fund, which now totals just over \$1 million. Its income supports such work as educating teens about pregnancy prevention, encouraging healthy lifestyles, and helping victims of domestic violence get back on their feet.

Those who join the Lewis Century Society, by providing for the Women & Girls Fund in their estate planning, will keep it working—perhaps meeting new needs— forever. Olson and other founding members are out telling people about the fund, talking about why it’s so important. “We’ll be happy to talk with anyone about this,” says Olson.

“I’ve seen how women are held back,” she says. “I’ve been blessed, in terms of encouragement and education. But I know women who don’t get those. I hear heart-breaking stories of poverty, of abuse.” The Lewis Century Society will ensure that Women & Girls will always be there, to hear the stories and to take action.

Maura Casey, another founding member of the Lewis Century Society, says, “There is tremendous power in good, and the good we do can live on after us. The issue isn’t just about money; it’s about priorities, and the message we leave about our values.

“I believe in the good work that the Women & Girls Fund does, and I believe that it will continue to have an impact for years to come. The bequest that I left will be one of my last messages to my family, my two children, and my community. This simple action will say that it’s important to care about others and, most of all, to act on what you believe in.”

TOGETHER, WE DID IT!

In just a short five years, several hundred women embraced the idea of women helping other women and girls and through their generous support, pushed the Women & Girls Fund over the million dollar mark by December 2004. Every gift made a difference in reaching this lofty milestone and will continue to have impact as the fund grows and awards its sixth round of grants this year.

Special recognition goes to the following women whose heroic response closed the gap in the final months of the year:

Bridget Baird
Mary Dangremond
Marion Doro
Alice Fitzpatrick
Eleanor Harvey
Rita Hendel
Priscilla Hodges
Diane Atwood Johnson
Mary Jane McGinnis
Nancy McLoughlin
Carol Milne
Julie Olson
Connie Pike
Joyce Resnikoff
Beth Tillman
Cynthia Willauer



SOON AFTER THE COMMUNITY FOUNDATION LAUNCHED THE WOMEN & GIRLS FUND, A DESCENDANT OF HARRIET RICHARD LEWIS CAME UPON HER PORTRAIT (ABOVE), IN A CALIFORNIA ATTIC.

JULIE OLSON CALLS IT "MIRACULOUS," AND A VERY GOOD SIGN INDEED, THAT SO MUCH HAS COME TOGETHER, FOR SUCH GOOD PURPOSES.

women & girls fund grant awards

DOMESTIC VIOLENCE

Connecticut Teen Peace

Open discussions with caring staff on topics of domestic violence and teen pregnancy. \$3,000

First Step

Funding to help women who are victims of domestic violence with housing and other basic needs. \$2,000

Girl Scouts Connecticut Trails Council

Domestic violence and healthy lifestyle program prevention program for 80 girls ages 11 to 17. \$4,000

Thames River Family Program

Speakers and facilitated discussions on the topic of domestic violence for residents. \$4,000

Women's Center of Southeastern Connecticut

Domestic violence prevention program aimed at young men \$5,000

TEEN PREGNANCY/STD PREVENTION

Alliance For Living

HIV/AIDS prevention program aimed at teenaged girls. \$2,000

Child & Family Agency of Southeastern Connecticut

Expand reproductive health care services in school based health centers to reduce STDs and teen pregnancy. \$5,000

Community Partnerships / Teen Health Task Force

Comprehensive evaluation of current pregnancy prevention programs to develop community plan for New London. \$10,000

Planned Parenthood of Connecticut For Teens Only

Prevention workshops for local schools and organizations to reduce teen pregnancy and STDs. \$5,000

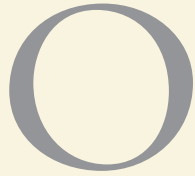
UPLIFT Teen Pregnancy Prevention Program

Expand program for older teens who have highest pregnancy rate. \$10,000

TOTAL \$50,000



LET'S READ



On a spring afternoon, there were shouts and hugs as nearly 20 youngsters welcomed students from Connecticut College – three men, three women – to the gym at Winthrop Elementary School in New London. Soon the visitors were guiding the youngsters in stretching exercises, games of tag and statues, shooting baskets, and just plain running and bouncing. “You can do it! Awesome!” Conn students yelled, as youngsters tried new exercises or aimed for the basket.

For a thirst-quenching break, there were cool-looking Connecticut College water bottles. Then everybody settled into small, cozy groups where the Conn students read aloud. Often the youngsters read aloud, too, with passages requiring special effects, like growls, proving especially popular.

It was a typical afternoon for Project KBA, which stands for **Kids, Books & Athletics**. The project has operated for two school years, each with a grant from the Community Foundation’s Let’s Read Fund, through Conn’s Office of Volunteers for Community Service, its Holleran Center for Community Action and Public Policy, and its Athletic Center. During the school year, 124 Conn students received training for KBA, then regularly visited six after-school sites serving 340 New London youngsters. The project — which aims to expand in 2005-06 — is designed to promote reading and physical fitness for the youngsters, while giving Conn students opportunities to become involved in the community and to develop teaching skills.

“KBA combines so many wonderful things,” said Reona Dyess-Dunham, director of the Drop-In Learning Center served by the project. “The kids exercise their bodies and their minds. There’s talking, mentoring, sharing, bonding.”

The youngsters find the Conn students to be lively and fun—and to be

people to whom reading and education matter. They’re hooked when one says, “This was one of my favorite books when I was your age.”

Books from the KBA sessions are donated to the libraries of the after-school sites. “When the kids see a book that they read at KBA, they say ‘Ooooh!’ They grab it and read it for themselves,” said Mrs. Dyess-Dunham.

Duncan Rollaston, Conn ’07, said, “I love seeing the kids succeed.” But he had little time to talk; there were still baskets to shoot in the Winthrop gym, where the afternoon was about to close on an exciting note.

Sure enough, the next week brought two busloads to the college arboretum. Many youngsters held hands with their college hosts as they hiked the arboretum paths, spotting everything from skunk cabbage (“Don’t smell them,” advised one small visitor) to turtles.

“KBA combines so many wonderful things. The kids exercise their bodies and their minds. There’s talking, mentoring, sharing, bonding.”

They even helped the Conn grounds crew plant a red-bud tree—their own red-bud tree. “Any time you come by, look. This is yours,” Duncan told them.

Then everybody adjourned to the lawn outside the college chapel, where there were snacks of granola bars and fruit, along with the Conn water bottles. Kids sipped and nibbled as their hosts read “A Tree is Nice” — a book that points out how cows, among others, appreciate the shade of a tree.

“Mooo,” murmured several listeners.

let's read 2004

"Not all readers are leaders, but all leaders are readers."

— Harry Truman

WE ELEVATED THE
KIDS & BOOKS INITIATIVE
TO THE 'LET'S READ'
CAMPAIGN.

OUR GOAL IS TO GET ALL
KIDS READING AT GRADE
LEVEL BY THIRD GRADE

Child & Family Agency

Support of book ownership and literacy program for
New London children **\$2,000**

Children's Museum of Southeastern Connecticut

Book Bound collaborative program with B.P. Learned
Mission **\$2,000**

Connecticut College, Office of Volunteers for Community Service

Project Kids-Books-Athletics to promote reading and
physical fitness **\$5,000**

Jewish Federation of Eastern Connecticut

Volunteer training program to tutor students in New
London elementary schools. **\$5,000**

Kente Cultural Center

Storytelling and craft time for 3 to 6 year-olds
New London children. **\$2,200**

Lymes' Youth Service Bureau

Pre-literacy skills development and play group program
for at-risk students. **\$2,000**

Mystic & Noank Library

Program for children and parents integrating different
arts forms and reading. **\$1,200**

Nathan Hale Elementary School

Non-fiction books for special education students for
social studies and science. **\$1,500**

New London Adult Education

Even Start program to bring books and storytelling into
low-income homes **\$2,000**

New London Office of Youth Affairs

RAD ReADers, middle school students create audiotapes
of books for pre-schoolers **\$2,000**

Oakdale School

Encouraging Reading in Kindergarten to increase parental
involvement **\$2,000**

Read to Grow

Books, parent education and follow up for all babies born
at L&M Hospital **\$5,000**

Riverfront Children's Center

Reading month activities and books for the parent
lending library **\$1,000**

West Vine Street Elementary School

The Book Nook Project for families to create a family read-
ing area at home **\$1,300**

Winthrop Elementary School

Books and reading materials for the Dual Language
Program **\$1,000**

Women's Center of Southeastern Connecticut

Creation of a comfortable reading area with books for the
children of Phoenix House **\$2,000**

TOTAL GRANTS **\$37,200**



scholarships 2004

COMMUNITY

FOUNDATION MAKES

\$216,048

IN SCHOLARSHIP AWARDS

FOR 2004

*“An investment in
knowledge always pays
the best interest.”*

— Benjamin Franklin

Marjory B. and Laurence P. “Jim” Smith Scholarship:
Lea Vincente, Montville High School; Autumn Winslow, Waterford High School; Kelly Jensen, New London High School; Jeremy Ashinghurst, East Lyme High School; and Drew Murray, Fitch High School.

Citizens Bank Scholarship:
Kevin Northcutt, East Lyme High School.

Tuneski/Sheflott Heritage Scholarship:
Stephanie Carmack, Stonington High School.

Alcino Almedia Scholarship:
Jeremy Carmona, New London High School.

DiCesare-Bentley Engineering Scholarships:
Tristan-Luis Edovas, Fitch Senior High School; Jessica Nardone, Stonington High School; Eric Garside, New London High School; Stephen Moore, East Lyme High School and Jeremy Griffin, Waterford.

Patricia K. Drake Scholarship:
Chanje Evans, New London High School.

C. Francis Driscoll Citizenship and Public Affairs Scholarship: Jeremy Carmona, New London High School.

John Ostrom Enders II Memorial Scholarships:
Jessica Hunter, Fitch High School and Brittany DeWolf, Waterford High School.

Eric Evans Scholarship:
Jeffrey Johnson, New London.

Fletcher Family Scholarship:
Bianca Molina, Waterford High School.

Dr. Edward Gipstein Scholarship:
Anjali Deshmukh, East Lyme.

Harvey Family Scholarship:
Christopher Belknap, Stonington.

Hendel Family Association:
Adriane Jefferson, New London High School.

Dr. Isadore Hendel Scholarship:
Rebecca LaFleur, Waterford High School.

Rita and Myron Hendel Scholarship:
Deshanda Langlois, New London High School.

Edwin Higgins, Jr. Scholarship:
Joshua Gomes, Waterford High School.

Mark Klotz Memorial Scholarship:
Casey Flynn, Stonington High School.

Dr. Charles K. Lee Rotary Scholarship:
Ariana Wiley, New London High School.

Beverly G. and George P. Letz Scholarship:
Chadene Zack, Fitch Senior High School.

Rose and Abraham Lubchansky Scholarship:
Carlos Alvarado, New London High School.

Don Lumadue Scholarship:
Rebecca Giannattasio, East Lyme High School.

Gunvor Lund Scholarships:
Sarah Latham, Dean Ljubicic and Christopher Wenderoth, Groton; Michael Wu and Swati Deshmukh, East Lyme; and Kelly Dyer and Sean Dyer, New London.

Mallove Family Scholarship and William B. Pedace Scholarship: Eric Murphy, New London High School.

Edythe and Harold McNulty Scholarships: Mary Gauthier, Groton; William Phinney and Jennifer Sposito, Waterford; and Kerry Stephenson and Angeline Bossa, New London.

Gilbert Mead Memorial Scholarship:
Jeremy Davis, Old Lyme.

William and Evelyn Mehlman Scholarship:
Noe Masse, New London High School.

John F. O'Brien, Jr. Scholarship: Tri Q. Le, Leydard.

Pat Patterson Music Scholarship:
Stephen O'Dell, East Lyme.

Raymond V. Payer Scholarship:
Jaclyn Freeman, Waterford.

Antone “Billy” Roderick Scholarship:
Bennett Brissette, Stonington High School.

Joan and Bob Rutman Scholarship:
Joy Wilson, New London High School.

Laurence P. Smith/Mitchell College Scholarship:
Lacrisa Evans, Fitch High School.

Marjory Bradford Smith Scholarship:
Lisette Sufficool, Fitch High School.

Dr. Thomas Soltz Scholarship:
Roza Anthony, New London High School.

Stonington 350th Anniversary Scholarship:
Jennifer Froling, Stonington High School.

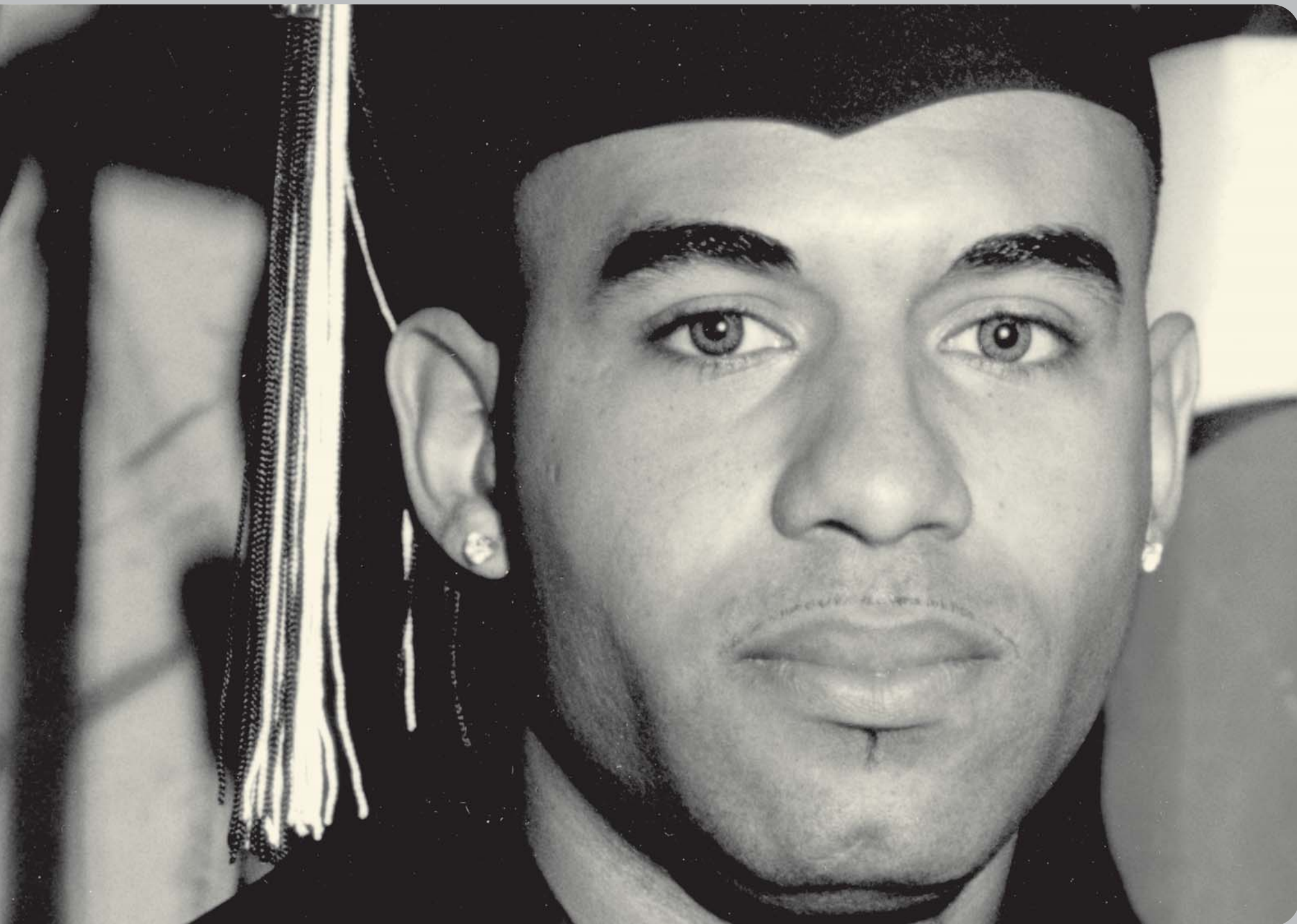
Fanny Stubblefield Scholarship:
Angela Triandafilou, Ledyard High School.

James Torrance Scholarship:
Shannon Verissimo, Montville High School.

Waterford Scholars: Philip Potter, Kateryn Caraballo, Stephanie Ann Carzoo, Joshua Cushing, Sara Dunaj, James McShane, Lauren Potter and Aaron Wild, Waterford.

Cornelius and Mary Jane York Scholarship:
Jacob Marcek, Ledyard High School.

Beatrice McEwen Scholarships: Gregory Miller, Christos Goumenos, Sofelia Cifligu, Jiang Zheng, Morris Wright of New London; Hailie Bomster, Janine Conklin, Justine Banker of North Stonington; Blair Kauffmann, Charles Plungis, Kristopher Moore, Michael Matias, Brendan McGee of Groton; Jayme Keeling, Jonathan Keeling of Lyme; Carine Dodge, Laura Neville, Marybeth Fafalla, Anthony LaMesa, Kara Donnelly of Old Lyme; Crystal Root of Waterford; Zachary Stewart, Jennifer Puhlman of East Lyme; Katie Ellis of Ledyard; and Sarah LeFrancois, Michael Jurczik, Brittney Tree, Jenna Head, Ann Marie Rynning of Montville.



THE SEAN DUZANT MEMORIAL SCHOLARSHIP FUND

W

e want to keep our son's memory alive -- and to help other students," says Michael Duzant, explaining why he and his wife, Cheryl, established the **Sean Duzant**

Memorial Scholarship. They established it through the Community Foundation of Southeastern Connecticut, he adds, because they know the Foundation's good work in their community. They also know they can stay involved, by such means as helping to select scholarship recipients who show spirit and drive, in academics and sports.

Sean was full of spirit and drive. He was a star athlete at New London High School and at Central Connecticut State University, where he majored in biology. He was working as a lab technician for NUCON at Pfizer when a tragic accident cut his life so short.

He was 27, with plans. An enthusiastic fisherman since his dad first handed him a little fishing pole, he'd bought a boat and obtained his Captain's license, to start his own fishing charter business.

His family (the most important people in his life), friends, and teammates share memories of a fine young man who loved life--and who always helped others, especially his fishing buddies, succeed.

For years and years to come, the scholarship in his name will keep Sean's nature alive and help other young people succeed.

*We want to keep our son's memory
alive – and to help other students*

funds 2004

THE FOUNDATION'S
PERMANENT ENDOWMENT
FUNDS AND THE YEAR
EACH WAS ESTABLISHED

DONOR DESIGNATED FUNDS

Annual distributions are made to named organizations in perpetuity

- 1984 **Florence and Raphael Shafner Fund**
Benefits L&M Hospital, American Red Cross, Child & Family Agency, Public Library of New London, & West Farms Land Trust
- 1986 **Rose & Sigmund Strochlitz Fund**
Supports Waterford Public Library
- 1988 **Jane W. Williams Fund**
Benefits Mystic/Noank Library, Noank Historical Society, Literacy Volunteers
- 1991 **Martha H. Griffis Fund**
Supports the Public Library of New London
- 1994 **Walter V. Baker Fund**
Supports the Public Library of New London
- 1996 **Anonymous III Fund**
Benefits VNA, Waterford Public Library and Waterford Scholars
- 1997 **Hartman Park Endowment Fund**
Supports the maintenance of Hartman Park in Lyme, CT
- 1998 **The Dyanne M. Rafal Fund**
Benefits Lyme Youth Service Bureau and Old Lyme Day Care
- 1998 **Josephine Lanzalotta Allen Fund**
Benefits Children's Museum, Hospice, L&M Hospital and St. Paul's Church
- 1999 **Beaumont Family Fund**
Supports scholarships awarded by the Mystic Rotary Club
- 2004 **The Leonard and Irene Zuckerbraun Family Fund**
Supports the Eastern CT Symphony Young Artists Competition

FIELD OF INTEREST FUNDS

Donors choose an area for the Foundation to support

- 1986 **Elvia Enders Richards Fund**
For home health care services
- 1989 **Elisha and Lena J. Burt Charitable Trust**
For Groton-based organizations
- 1990 **Henry C. White Memorial Fund**
To help prevent and treat substance abuse
- 1996 **Anonymous II**
To support healthy families
- 1998 **The Daniel and Rose Hendel Fund**
For children's programs
- 1999 **Carl Clark Graves Fund**
To advance the sports of crew, sculling and other water-based activities
- 1999 **Women & Girls Fund**
To improve the lives of local women and girls
- 2000 **Avery Russell Morgan Children's Literacy Fund**
To promote the love of reading in children
- 2000 **Beaver Brook Fund**
To advance the treatment of mental illness
- 2001 **Juliana Valentine McCourt Children's Education Fund**
To foster habits of tolerance and inclusion among children
- 2002 **Arts Endowment Fund**
To promote artistic endeavors
- 2002 **"Let's Read" Fund** (*formerly Kids & Books*)
To support literacy programs that engender a love of learning and reading
- 2003 **The Lydia I. Korolkiewicz Fund**
To prevent and treat victims of domestic abuse (affiliated with the Women & Girls Fund)

DONOR ADVISED FUNDS – ENDOWED

Donors annually recommend grants to programs of their choice

- 1984 **Gildersleeve/White Fund**
- 1997 **Howe Charitable Fund**
- 1999 **Lewis Female Cent Society Fund**
(affiliated with the Women & Girls Fund)
- 1999 **Gross Family Fund**
- 1999 **Barbara Kiss Johnson Fund**
- 2000 **Richard E. and Marjorie E. Rowe Family Fund**
- 2001 **Toulmin Family Fund**
- 2002 **Anthony and Elizabeth Enders Fund**
- 2002 **David and Muriel Hinkle Fund**
- 2003 **Harold and Miriam Dean Fund**
- 2003 **Anonymous VIII Fund**
- 2003 **Dangremond Family Fund**
- 2004 **The Elaine Pearl Shapiro and Michael Shapiro Charitable Fund**
- 2004 **The Heritage Fund**
- 2004 **Sarah Ann Martin Fund**
Advised by the Connecticut Department of Environmental Services(DEP)

SCHOLARSHIP FUNDS

Each scholarship carries the specific guidelines established by the donor

- 1983 **Hendel Family Association Scholarship Fund**
For a New London High School student who has overcome great hardship

- 1983 **Marjory B. & Laurence P. “Jim” Smith Scholarship Fund**
For an outstanding student from each of five local high schools with financial need
- 1983 **Rita & Myron Hendel Scholarship Fund**
For a New London High School student who shows great promise and motivation
- 1987 **Elie Wiesel Humanitarian Award & Scholarship Fund**
To supplement the Williams School tuition of a local student
- 1988 **William & Evelyn Mehlman Scholarship Fund**
For a New London High School student who intends to study business
- 1988 **Rose & Abraham Lubchansky Scholarship Fund**
For a New London High School student showing an interest in civics and politics
- 1989 **George and Beverly Letz Scholarship Fund**
For a Groton student pursuing health related studies
- 1989 **Mallove Family Scholarship Fund**
For a New London High School student with strong academic performance
- 1991 **Antone “Billy” Roderick Scholarship Fund**
For a Stonington High School student who will pursue marine biology
- 1993 **James H. Torrance Scholarship Fund**
For a Montville High School student who will study engineering
- 1993 **John Ostrom Enders II Memorial Scholarship Fund**
For a serious student of the creative arts
- 1993 **Cornelius and Mary Jane York Scholarship Fund**
For a student at UCONN's School of Agricultural & Natural Resources
- 1993 **Thomas Soltz Scholarship Fund**
For a student with strong academic ability
- 1994 **C. Francis Driscoll Scholarship Fund**
For a New London or St. Bernard High School student with excellence in public affairs and government
- 1994 **Raymond Vaughn Payer Scholarship Fund**
For a Williams School essay contest winner: “Press On Regardless”
- 1996 **Dr. Isadore Hendel Memorial Scholarship Fund**
For a Waterford High School student with strong community service involvement
- 1996 **Gilbert W. Mead Memorial Scholarship Fund**
For an art student, with preference for someone with a physical limitation
- 1996 **Waterford Scholars Fund**
For outstanding students residing in Waterford
- 1996 **Beatrice McEwen Fund**
For students with high academic achievement and financial need
- 1996 **Harvey Family Scholarship Fund**
For a Stonington student with a well-rounded track record
- 1996 **Fletcher Family Scholarship Fund**
For a student with strong academic standing
- 1997 **Gunvor Lund Scholarship Fund**
For students pursuing a career in engineering or science
- 1997 **Tuneski/Sheflott Scholarship Fund**
For a student with good academics and notable Irish or Polish heritage
- 1997 **William Pedace Scholarship Fund**
For a New London High School student with strong academic standing
- 1997 **Alcino M. Almeida Scholarship Fund**
For a student with strong academic standing
- 1998 **Mark Klotz Memorial Scholarship Fund**
For a Stonington High School student with skill in soccer
- 1998 **John F. O'Brien, Jr. Scholarship Fund**
For a student with an interest in health care
- 1999 **Pat Patterson Music Scholarship Fund**
For a student with musical talent and an interest in jazz
- 1999 **Dr. Edward and Fuzzy Gipstein Scholarship Fund**
For a top-ranked student with an interest in medicine or the arts
- 2000 **The Stonington 350th Anniversary Scholarship Fund**
For a Stonington resident pursuing unique educational opportunities
- 2000 **Patricia K. Drake Scholarship Fund**
For a minority student with an interest in health or human services
- 2001 **Brodhead Scholarship Fund**
For distribution by the Noank Baptist Church
- 2001 **The Joan & Bob Rutman Scholarship Fund**
For a student with good academic standing and financial need
- 2002 **Edythe and Harold McNulty Scholarship Fund**
To encourage students to pursue nursing as a career
- 2002 **Eric Evans Scholarship Fund**
For a student at Syracuse University
- 2002 **Leslie M. Buck Teacher Education Scholarship Fund**
For a student pursuing a career in teaching
- 2002 **The Fannie Stubblefield Scholarship Fund**
For a minority student of the liberal arts with financial need
- 2003 **Don Lumadue Scholarship Fund**
For a student of the fine or performing arts
- 2003 **Hispanic Alliance Scholarship Fund**
For students identified by the Hispanic Alliance
- 2004 **The Viola A. and Henry W. Turner Memorial Scholarship Fund**
For a students pursuing a career in education
- 2004 **Edwin C. Higgins, Jr. Scholarship Fund**
For a student of the building trades, technology or business
- 2004 **Sean Duzant Memorial Scholarship Fund**
For a student with good academic standing, interested in biology and/or soccer
- 2004 **Kemaphoon “Ahn” Chanawongse Scholarship Fund**
For distribution by Waterford High School
- 2004 **Arnold Avery Scholarship Fund**
For a Fitch High School student of marine science, library science, or English
- Non-Endowed Scholarship Awards**
(Annually funded)
- Smith/Mitchell College Scholarship**
For distribution by Mitchell College
- M. Bradford Smith Scholarship**
For a student pursuing a career in dental hygiene
- Citizens Bank Scholarship**
For a student with financial need and a record of community involvement
- DiCesare-Bentley Scholarship**
For students from 5 towns who will pursue an engineering degree
- Dr. Charles K. Lee Scholarship**
For a minority student of science (funded by Pfizer & New London Rotary Foundation)

UNRESTRICTED FUNDS

These funds are intended by donors to meet the emerging needs of the community

- 1983 **Catherine M. & Charles R. Sortor Fund**
- 1983 **Chester W. Kitchings Fund**
- 1983 **Doris R. & Benjamin A. Levinson Fund**
- 1983 **Mr. and Mrs. J. Martin Leatherman Fund**
- 1983 **New London Rotary Fund**
- 1983 **Palmer/Bodenwein Fund**
- 1983 **Shea Fund**
- 1983 **Marjorie & Jim Smith Unrestricted Fund**
- 1983 **Stamm Family Fund**
- 1984 **Elaine M. and Dr. David Ginsberg Fund**
- 1984 **Union Trust Fund**
- 1984 **Avery-Hammond Fund**
- 1985 **Carrie V. and Horace W. Rowe Family Fund**
- 1985 **Coastal (New London Federal Savings & Loan)**
- 1986 **Francis J. and Sally T. Pavetti Fund**
- 1986 **Solomons Family Fund**
- 1987 **David C. Smith Memorial Fund**
- 1987 **Robert W. Marrion Founding President Fund**
- 1987 **William J. Hazlewood Fund**
- 1988 **New England Savings Bank Fund**
- 1989 **Harry R. and Dorothy S. Hazard Fund**
- 1990 **Harvey Mallove Memorial Fund**



For non-profit organizations to secure a lasting, predictable stream of income, agency endowments are one way. The foundation pools the monies transferred by more than 20 organizations with its invested assets. Each year, the foundation makes distributions to the organizations from the earnings. The non-profits benefit from professional investment oversight, greater diversification, lower fees, and the knowledge that it has provided for its own long-term financial health.

Tony Mollica, executive director at The Children's Museum of Southeastern Connecticut in Niantic, cites another reason for establishing an agency endowment. "It is a potential repository for museum donors who wish to leave a bequest in their estate plans." The museum is stepping up its efforts to promote bequests and other planned gifts among its supporters to ensure its educational outreach to children and their families "through exploration of the arts, sciences, culture and history."

- 1990 Dorothy West Lathrop & Harriet Sullivan Wallace Fund
- 1991 Thomas Edison Troland Memorial Fund
- 1992 Robert A. Doherty Memorial Fund
- 1992 Joan and Thomas Wetmore Fund
- 1993 Mary Hewitt & Edward Mann Fund
- 1993 General Unrestricted Fund
- 1996 George A. Ott Fund
- 1996 J. Martin and Caroline S. Leatherman Fund
- 1996 Victoria & Charles Glassenberg Fund
- 1996 John T. & Evelyn MacDougall Fund
- 1996 Mildred E. "Millie" Devine Fund
- 1996 Robert and Lois Geary Fund
- 1997 Shirley Beal Fund
- 1997 The John O'Brien Fund
- 1997 Margaret and William Orkney and Grant Hileman Fund
- 1997 Carolyn L. and Kenneth E. Grube Memorial Fund
- 1997 Millard R. York Fund
- 1997 Anonymous IV Fund
- 1998 Carol L. Chappell Fund
- 1998 The Whittemore-Kepple Fund
- 1998 Alva G. Greenberg Fund
- 1998 Anonymous V
- 1998 Matthews Family Fund
- 1998 The Nightingale Fund
- 1998 Bredeson Family Fund
- 1998 Neal & Jane Lassen Bobruff Fund
- 1998 Peter Block Fund
- 1998 Susan H. Timken Fund
- 1999 Betty Richards Tripp Fund
- 1999 450 Memorial Fund
- 1999 Minnie and Dorothy Levinson Fund
- 1999 William R. Hannaford Fund

- 2000 Irma Baker Memorial Fund
- 2000 The Melvin Simon Fund
- 2001 The Isadore and Isabelle Rogovin Fund
- 2002 Reid and Linda MacCluggage Fund
- 2002 Andrew and Elaine McKirdy Fund
- 2002 Old Black Point Association Fund
- 2003 Ann and Gordon Douglas Fund

OPERATING ENDOWMENT FUNDS

These funds are reserved for the advancement of the work of the Foundation

- 1996 Ann & Karel den Tex Fund
- 1998 Harry and Sarah Birenbaum Fund
- 1998 The Helen Vergason Trust
- 1998 The Fitzpatrick Fund for the 21st Century
- 1998 The Adele Clement Trust
- 2000 Marion E. Sanford Fund
- 2002 The Robert F. Shannon Fund
- 2003 Administrative Endowment Fund
- 2004 Mr. and Mrs. William G. Hammond Fund

AGENCY ENDOWMENT FUNDS

Principal is invested in Foundation pool; earnings are available for agency use

- 1993 United Way Endowment Fund
- 1997 Dr. Martin Luther King Memorial Scholarship Fund
- 1998 Jack Banner Memorial Fund (Big Brothers/Big Sisters)
- 2000 Stonington Education Fund
- 2000 The Sarah Morse Eastern Connecticut Ballet Dance Scholarship Fund
- 2001 New London Public School Fund
- 2001 Connecticut Early Music Fund
- 2001 Shiloh Baptist Church Fund
- 2001 The Griffis Art Center Fund
- 2001 Fred and Jo Falkner Fund (Big Brothers/Big Sisters) Fund

- 2001 Old Lyme Social Service Emergency Fund
- 2001 Hempsted Heritage Fund
- 2002 Alliance For Living Fund
- 2002 Science EpiCenter Fund
- 2002 Mitch & Betty Salomon Fund (Wood Pawcatuck Watershed Association)
- 2002 Mystic Arts Center Education Endowment Fund
- 2003 A Moveable Feast Fund
- 2003 Pawcatuck Neighborhood Center Fund
- 2003 Lyme Art Association Fund
- 2003 ARC of New London County Fund
- 2004 Children's Museum of Southeastern Connecticut Fund
- 2004 Covenant Shelter Fund
- 2004 Literacy Volunteers of Eastern Connecticut Fund

NON-ENDOWED DONOR ADVISED FUNDS

Donors regularly contribute to charities of their choice through ongoing gifts to the Foundation

- 1994 Jim & Marjorie Smith Fund
- 1996 Deborah Scott Fund
- 1997 Alliot Fund
- 1999 Linda Mariani & David Neusner Fund
- 2000 Kenneth G. Chapman Fund
- 2000 Peter Matthews Fund
- 2001 Boettner Fund
- 2001 Griffis Art Center Fund
- 2001 Elizabeth Newell Butler Gregory Fund
- 2001 Roger Gross Fund
- 2002 McCormick Fund
- 2002 Georgia York Fund
- 2004 Sally Bill Fund

donors 2004

*“The best time to plant
a tree is 20 years ago
The second best time is
today.”*

— African proverb

\$50,000 and above

Covenant Shelter of N.L., Inc.*
Kitchings Foundation
Estate of Sarah Martin
Mr. and Mrs. Richard E. Rowe
Mr. and Mrs. Laurence P. Smith

\$25,000 - \$49,999

Anonymous (2)
Mr. Kenneth G. Chapman
Children's Museum of Southeastern Connecticut*
Mr. and Mrs. Anthony Enders
Mr. and Mrs. Richard Gildersleeve
Estate of George Hammond
Frank Loomis Palmer Fund

\$10,000 - \$24,999

A Moveable Feast*
Mrs. Sally Bill
Mr. and Mrs. John N. Butler
Connecticut Early Music*
Friends of Ahn Chanawongse
Mr. and Mrs. David W. Dangremond
Friends of Edwin C. Higgins, Jr.
Mr. and Mrs. Donald O'Brien
Pfizer, Inc.
Michael P. and Elaine Shapiro

* Contribution to an Agency Endowment

United Way of Southeastern Connecticut
(CIMA grants)

\$5,000 - \$9,999

Ms. Bridget Baird
Mrs. Carole Bobruff
Mr. Wayne Boettner
Ms. Melinda Carlisle
Dr. Bettye R.J. Fletcher
Mr. and Mrs. Harold Gegenheimer
Mr. & Mrs. Albert B. Glassenberg
Mrs. Eldon Harvey, Jr.
Mr. and Mrs. Peter Hodges
Ms. Diana Atwood Johnson and
Mr. John Johnson
Estate of Lydia I. Korolkiewicz
Literacy Volunteers of Eastern Connecticut*
Mr. and Mrs. Peter Matthews
Mr. Andrew McKirdy
Nancy McLoughlin
Dr. and Mrs. George M. Milne, Jr.
Olde Mistick Village
Mr. and Mrs. Philip Turner
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Giving is easy. You can start small or start large; provide for current projects or future ones; support organizations that you know and work that you care about.

Whatever your charitable goals, the Community Foundation stands ready to help you realize them.

You can support the Foundation's ongoing work with an unrestricted gift of any amount. Or, you can contribute any amount to any of the Foundation's 170 permanent endowment funds which benefit a diverse range of causes and organizations in southeastern Connecticut, now or through your estate planning.

Through the Foundation you can also establish and name a new endowment fund and direct its purpose.

Following are some details on ways to give, now or later.

Establishing a New Fund

You can create your own endowed fund with a contribution of \$5,000–10,000 (varies according to type of fund). You can create such a fund during your lifetime or through a will or a trust, or through planned gifts which provide income to you during your lifetime. The contribution may be made with any of a number of different assets including cash, stock and in some cases, real estate.

In helping you to establish this fund, our staff will ask you: What would you like to accomplish? Where do your interests lie? Would you like to involve your family in gift giving decisions? Do you wish to honor or memorialize someone? Would you like to create a fund through a bequest or your estate plan? Would a planned gift vehicle be of benefit to you in making a charitable gift that will also provide income for you or a relative?

Then you can choose the type of fund that is best for your situation and choose how the fund will be named – perhaps for yourself or your family, or in honor or remembrance of a friend or loved one.

Here is a sampling of the types of funds you can establish:

Unrestricted (\$5,000 minimum)

Donors place no restrictions on their gifts, and the foundation's Board has full discretion in allocating the income. As opportunities arise to address challenges in our community, the Board can target its grant making to key issues.

Field of Interest (\$5,000 minimum)

Donors choose a particular cause or geographic area for which the funds are to be used in perpetuity.

Donor Advised (\$5,000 minimum endowed/\$1,000 minimum for current distribution)

Donors remain actively involved in their giving. Foundation staff consults with donors for recommendations on proposals which have been presented for funding, or the donors may direct distributions of their own choosing.

Designated (\$5,000 minimum)

Donors permanently designate their funds for a specific organization(s).

Scholarship (\$10,000 minimum)

Donors can direct their funds with guidelines they establish. The foundation and its experienced scholarship committee can handle the entire review, or the donor may make recommendations from applicants presented by the foundation staff.

Agency Endowment (\$5,000 minimum)

A non-profit organization and/or its donors can create a permanent revenue stream for the future strength of that organization.

Administrative (\$5,000 minimum)

Donors provide for the ongoing work of the Foundation.

You may also be interested in supporting the foundation's

Special Initiatives: the **Women & Girls Fund**, which improves the lives of local women and girls, and the **Let's Read Fund**, which fosters literacy among children and their families.

A FUND CAN:

- ▶ Honor or memorialize an individual, family or group.
- ▶ Support the interest or organization(s) of your choice.
- ▶ Can support a specific town(s).
- ▶ Remain anonymous at your discretion.

GIVING LATER

Many donors prefer to leave charitable assets upon their deaths after ensuring that they and their loved ones have been cared for. It also may be that other estate assets, such as life insurance or house sale proceeds, only then become available for charitable purposes. Some ways to make a future gift include:

Bequests in Wills and Trusts – You can designate a gift or portion of your estate to the Foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes. Bequests are directed to the fund or purpose specified by the donor.

Retirement Plan Designations – You may realize significant tax benefits by naming the Foundation as a beneficiary of your qualified retirement plan.

Life Insurance – You may make a gift of a life insurance policy irrevocably designating the Foundation as the owner and beneficiary of the policy. Or, you may name the Foundation as a percentage beneficiary of a life insurance policy.

Remainder Interest in Real Estate – You may deed real estate such as a personal residence or vacation property to the Foundation and retain use of the property for the rest of your life. The rest of their lives.

GIFTS THAT GIVE YOU INCOME

You can realize the tax advantages of making a gift now, especially of highly appreciated assets, while still receiving income from that asset. Life income gift options include:

Charitable Gift Annuities – You make a gift of cash or property now and get immediate tax benefits. You (or a loved one) receive fixed quarterly or annual income payments for life. After your death, the remainder is directed to the fund or other charitable purpose at the Foundation, as specified by you.

Charitable Remainder Trusts – You place cash or property in a trust that pays you (or another named beneficiary) income for life. After death, the remainder of the trust transfers to the Foundation and is placed in the fund or purpose specified by the donor. You may receive income tax benefits in the year the trust is established.

Charitable Lead Trusts – You place cash or property in a trust that pays a fixed amount to the Foundation for a specified number of years. Once this period ends, the assets held by the trust are transferred to your beneficiaries. In some cases, the donor receives a substantial reduction in federal gift and estate taxes.

Our endowed funds form a pool of dollars whose earnings are disbursed through informed grant making to non-profit agencies and scholarship applicants, as well as by the instructions of donor advisors.

The foundation's assets are professionally managed with oversight by the Investment Committee and the Board of Trustees. You receive annual statements which detail gifts to, grants made from and investment returns to your fund.

Available income for distribution is determined by the foundation's spending policy, currently at 5% of the fund value based on a 12-quarter rolling average.

There is no cost to set up a fund. We currently charge an annual administrative fee of 1% of the fund value.

Cash or securities are the most common form of gifts. Other assets such as tangible property are accepted in accordance with the foundation's gift acceptance policy. All gifts receive the maximum deduction allowed by law.



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Adam's Garden of Eden	Michael's Dairy
Arrow Paper	Mohegan Sun Resort
Bangkok City	Noah's Restaurant
Block Island Ferry	Norwich Navigators
Bob's Discount Furniture, Inc.	Olio Restaurant
Captain Daniel Packer Inne	Recovery Room
Children's Museum of Southeastern Connecticut	Roberts Audio - Video
Denison Pequotsepos Nature Center	Schooner's Restaurant
E. Johnson Florist, Inc.	Jeanne Sigel
Eastern Connecticut Symphony Orchestra	Stop & Shop
F & F Distributors Inc.	Summer Music
Garde Arts Center	Tony D's
GEICO Insurance	Utopia Total Salon
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Heads Above the Rest	Waterhouse Salon
Hoelck's Florist	Zach's Bar & Grill
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Lyman Allyn Museum of Art	
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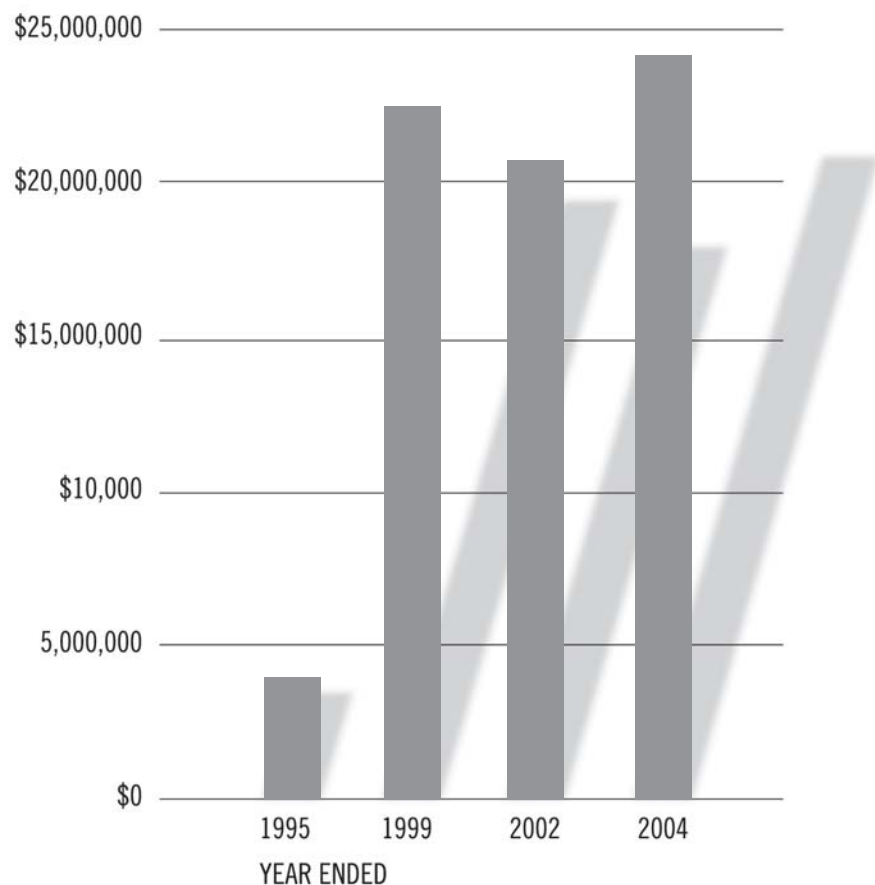
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statements of financial position 2004

Endowment Growth



ASSETS

	2004	2003
Cash and cash equivalents	\$ 44,648	\$ 25,661
Investments	19,207,806	17,254,684
Receivables	64,354	427,464
Split-interest agreements:	4,820,305	4,755,697
Property and equipment, net	300,385	313,623
TOTAL ASSETS	\$ 24,437,498	\$ 22,777,129

LIABILITIES AND NET ASSETS

Current Liabilities	128,042	123,252
Liability Under Gift Annuity	8,130	8,321
Net Assets		
Board Designated	736,363	62,9076
Undesignated	18,735,253	17,262,803
Temporarily restricted	233,999	248,113
Permanently restricted	4,595,711	4,505,564
TOTAL NET ASSETS	24,301,326	22,645,556
TOTAL LIABILITIES AND NET ASSETS	\$ 24,437,498	\$ 22,777,129

statement of activities

with summarized financial information for the year ended December 31, 2003

2004

	Unrestricted	Temporarily Restricted	Permanently Restricted	2004 Total	2003 Total
REVENUES, GAINS AND OTHER SUPPORT					
Contributions	\$ 1,302,181	\$ 44,100	\$	\$ 1,346,281	\$ 1,588,214
Change in split-interest agreements	1,546	13,580	(73,559)	(58,433)	366,183
Change in value of perpetual trust			163,706	163,706	360,243
Investment Gains	1,272,564			1,272,564	2,085,406
Investment income	503,864			503,864	845,172
Special events (net)	21,418			21,418	24,818
Rental income	18,480			18,480	7,240
	<u>3,120,053</u>	<u>57,680</u>	<u>90,147</u>	<u>3,267,880</u>	<u>5,277,276</u>
Less investment fees	(114,223)			(114,223)	(92,284)
Total support	<u>3,005,830</u>	<u>57,680</u>	<u>90,147</u>	<u>3,153,657</u>	<u>5,184,992</u>
Net assets released from restrictions	71,794	(71,794)		0	0
Total revenues, gains and other support	<u>3,077,624</u>	<u>(14,114)</u>	<u>90,147</u>	<u>3,153,657</u>	<u>5,184,992</u>
EXPENSES					
Program services:					
Grants & Scholarships	1,026,769			1,026,769	1,051,666
Other grant expenses	139,105			139,105	147,580
TOTAL PROGRAM SERVICES	<u>1,165,874</u>			<u>1,165,874</u>	<u>1,199,246</u>
General & administrative expenses	332,011			332,011	331,614
TOTAL EXPENSES	<u>1,497,885</u>			<u>1,497,885</u>	<u>1,530,860</u>
INCREASE (DECREASE) IN NET ASSETS	1,579,739	(14,114)	90,147	1,655,772	3,654,132
NET ASSETS - BEGINNING OF YEAR	17,891,877	248,113	4,505,564	22,645,555	18,991,424
NET ASSETS - END OF YEAR	\$ 19,471,616	\$ 233,999	\$ 4,595,711	\$ 24,301,326	\$ 22,645,555



Martin House residents working on a community project.



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