Dear Friends:

This year’s annual report highlights partnerships, generosity, trust and commitment. We are proud to share stories of new fundholders and their passions and confidence that in partnering with the Community Foundation, their vision for a brighter future can become a reality. Working side by side with our philanthropic, nonprofit and community leaders, we are committed to bringing about positive change in our region.

Thanks to the generosity of more than 1,500 donors, we reached a new record of $6.7 million in grants and scholarships in 2018. This report presents just a few examples of our new funds and initiatives over the past year.

Looking ahead, we’ll keep making judicious and compassionate decisions in the awarding of grants. We’ll strengthen our role as strategic advocates and conveners to promote a healthy, thriving, sustainable Eastern Connecticut, and we’ll persevere in addressing inequities in our community. Our civic dialogues will amplify diverse voices in our community and connect residents who share values, passions and interests.

In 2019, our state faces fiscal challenges that will likely impact all organizations that depend on state support, including the vast array of nonprofits in Eastern Connecticut. We are encouraged that the new administration is reaching out to many community partners throughout the state to seek input and encourage collaboration in these difficult times. We plan to be an active participant in discussions that affect the welfare and future of our residents and environment.

As always, we salute all who make possible everything we achieve together. We look forward to expanding these networks even more broadly in the future.

With optimism and deep gratitude,

Maryam Elahi
President & CEO

We’ll strengthen our role as strategic advocates and conveners to promote a healthy, thriving, sustainable Eastern Connecticut, and we’ll persevere in addressing inequities in our community. Our civic dialogues will amplify diverse voices in our community and connect residents who share values, passions and interests. We will continue to nurture the Eastern Connecticut Mentoring Collaborative, the Land Trust Advancement Initiative and the New London Partnership for Student Success. We’re particularly excited about supporting advocacy through the Connecticut Civic Engagement Funders Collaborative and the CTCEF Women’s Civic Funds Public Policy Task Force to address policy changes that will advance the well-being of our residents.

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As always, we salute all who make possible everything we achieve together. We look forward to expanding these networks even more broadly in the future. For more detailed and comprehensive information regarding accomplishments in 2018, we invite you to visit our website at www.cfect.org.

With optimism and deep gratitude,

Maryam Elahi
President & CEO

David Schulz
Chair, Board of Trustees
Women & Girls Funds Task Force on Public Policy: Leadership Matters

What will it take to get true gender equity and equality? A range of opportunities, access, programs, services, and advocacy for people that elevate the status of women in our society. This is the focus of the Community Foundation’s four Women & Girls Funds.

Upon the release of our report on the Status of Women and Girls in Eastern Connecticut in January 2018, the Community Foundation’s four Women & Girls Funds Steering Committees mapped out a plan to address the findings from the report. Integral to the plan was creating common grantmaking criteria to unify, focus, and strengthen the impact of the grants from our Women & Girls Funds.

Economic Security
Education & Workforce Development
Wellness & Well-being

In addition, it was clear that we needed to use our advocacy and convening powers more frequently to initiate and support policies that remove barriers for women and girls. This prompted the creation of the Women & Girls Funds Task Force on Public Policy. Co-chaired by Peg O’Shea and Carol Williams, the Task Force is working with residents to identify goals for themselves and their communities. Peg and Carol have immersed themselves in the issues, authored an op-ed piece and offered testimony for parents, caregivers and all workers. Peg and Carol have immersed themselves in the issues, authored an op-ed piece and offered testimony at the state legislature. This forward-thinking group has also partnered with the Connecticut Women’s Legal and Education Fund (CWEALF) and the Connecticut Forest & Park Association, The Nature Conservancy in Connecticut, in 2018. By partnering with organizations such as Avalonia Land Conservancy, Connecticut Forest & Park Association, The Nature Conservancy in Connecticut, Project Oceanology, Mystic Aquarium and Sustainable CT, we are seeing positive movement on important environmental issues and an increase in young people’s interest in stewardship of the environment. We also support and commend the efforts of the Connecticut Land Conservation Council (CLCC) and The Last Green Valley, which are working together to accelerate the pace of conservation through regional collaboration and collective advocacy.

The Four Women & Girls Funds are committed to helping women and girls in Eastern Connecticut at the policy level through helping to shift attitudes, educate the public, and mobilize people in our community to have their voices heard throughout all of the Community Foundation’s four Women & Girls Funds

With a combined endowment of $4.2 million, these funds are a forever “force for good” that empowers women and girls to make positive choices for themselves; helps them access employment, education, and other services; and ensures that when faced with abuse of any kind, they have a helping hand to navigate the path toward safety and peace of mind.

In 2019, the Southeast Women & Girls Fund is celebrating 20 years of philanthropic partnerships that have come together to support programs designed to empower women and girls and their families.

Environmental Initiatives and Education Collaboration Matters

Thanks to the foresight and generosity of donors, including two major bequests that established the Peter Grasseski Endowment and the Environment, and the Mary Jarvis and Natalie Jarvis-Wigg Fund for Birds, Other Animals and Nature, the Community Foundation has been able to support non-profits that work to conserve land, address clean water issues and offer fun, engaging educational opportunities.

The impact goes well beyond the $1,236,600 in environmentally focused grants made in 2018. By partnering with organizations such as Audubon Land Conservation, Connecticut Forest & Park Association, The Nature Conservancy in Connecticut, Project Oceanology, Mystic Aquarium and Sustainable CT, we are seeing positive movement on important environmental issues and an increase in young people’s interest in stewardship of the environment. We also support and commend the efforts of the Connecticut Land Conservation Council (CLCC) and The Last Green Valley, which are working together to accelerate the pace of conservation through regional collaboration and collective advocacy.

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We chose the Community Foundation because colleagues and friends that we trust recommended them to us. Sustainability is very important to me, so even though we heard great things, I still wanted to do the math for myself. Despite two recessions with attendant stock declines over the past 17 years, the Community Foundation continued to grow. They have the management structure and controls in place to make sure they weather any storm and sustain the fund for years to come.

David Dresback

What’s your passion?
For David and Sherry Dresback, it’s creating opportunities for young people and families to thrive.

David and Sherry Dresback shared a gratitude for the life rewards that came as a result of accessing a good education. David earned a Ph.D. in the sciences from the University of Michigan and Sherry earned her B.A. after attending school at night while working at Pfizer. “We had terrific careers that provided a good life for our children and ourselves because we had a good education,” explained David. “We have been very fortunate and thought that supporting education for others would be a good thing, especially for students who need help.”

The Community Foundation has a long history of doing it right. They can help you achieve your own philanthropic objectives.

David and Sherry set up the David and Sherry Dresback Fund in 2006 to give annual college scholarships to six high school seniors – two each in Stonington, Groton and Ledyard. This was to recognize where their children went to school and where they lived for many years. Since then, 82 students have received scholarships. According to David, many scholarship recipients have sent thank you notes and updates over the years. “It is so rewarding to hear from a student who benefited and developed as an adult through accessing educational opportunities. We have also been able to increase the scholarship awards each year through Pfizer’s employee match program.”

After his beloved wife Sherry passed away in 2015, David decided to build upon the fund through a charitable trust provision created with the help of his advisor. Through the establishment of the endowed fund, the scholarships will be permanently funded and other issues close to his and his late wife’s hearts will also be supported forever.

FULFILLING YOUR PASSIONS

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What’s your passion?
For Lynn and Paul Malerba, it’s helping their neighbors in need.

Lynn Malerba, the first woman to be appointed Lifetime Chief of the Mohegan Tribe by the Tribe’s Council of Elders, learned early in life that it is important to give of yourself to help others and support your community. Lynn says she grew up in a loving and happy family, but recalls her parents struggling at times to make ends meet for their family of nine. Despite their limited resources, Lynn shared that her parents still found a way to give to others. “My father was heartbroken when he saw families at the food shelter. He cared deeply about supporting people and programs that help to provide for basic needs.”

Even long after you are in the next world, you can still do good. We are thrilled that the fund we created to honor my parents will be a lasting legacy that helps others in need for years to come.

Lynn Malerba

The fund is named after Lynn’s parents because they raised seven children, didn’t have lots of money, but still found a way to give. Their care for the community is a model for all.

Paul Malerba

To honor her parents, Lynn set up a donor advised fund at the Community Foundation. “I couldn’t think of a better way to honor our parents who did so much for so many,” explained Lynn. Through the Albert “Buttsie” and Loretta Roberge Fund, Lynn and her husband Paul will focus on food security, housing and transportation to help local individuals and families. According to Lynn, “Our donor advised fund will be a great way for our family and others to join together in doing good. We know that the Community Foundation as a steady and trusted partner, we’ll be able to make a difference now and into future generations.” Lynn currently serves as Vice Chair of the Community Foundation of Eastern Connecticut’s Board of Trustees and is a member of the Development Committee.

Lin and Waldo Klein are retired University of Connecticut professors; he from the UConn School of Social Work and she as a professor and associate dean at the UConn School of Business. “We had the best jobs in the world, but we are loving retirement. And, we are now fortunate to support the causes we are passionate about,” shared Waldo.

According to Lin, setting up a donor advised fund to put their passions into action is similarly rewarding. “With a donor advised fund, we get to decide how to support our community throughout the year,” said Lin.

The Lin and Waldo Klein Fund essentially focus on providing for basic needs in the Windham area, and also supports the Forest Society of Maine and other nonprofits that lead conservation and educational initiatives in the Moosehead Lake region, where they regularly enjoy summer vacations. “We wanted the flexibility to support locally and beyond. The Community Foundation can efficiently work with us to match our interests,” said Waldo.

What’s your passion?
For Lin and Waldo Klein, it’s providing for basic human needs.

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Mary Waldron recalls often hearing her father say, “Finish your meal! You don’t know what it’s like to not have food!” As an immigrant who fled Austria in 1938, her father grew up in another place and time, and knew a different, much tougher life. Like many immigrants, her father came to America in search of freedom, safety and a better life for his family. “My father was devoted to American values. He respected the law of the land and believed that the law was the great equalizer,” Mary explains.

Throughout her investment services career, Mary got to know the world of nonprofits and those they serve. She credits a bus trip she took with First Congregational Church of Old Lyme to visit the Equal Justice Initiative in Alabama and others working on advancing justice through the law for people of color with shaping her understanding of the importance of this transformational work.

Now retired and a resident of Old Lyme, Mary knew she could partner with the Community Foundation to address what she is so deeply passionate about: ensuring justice and equity for all who call America home. Mary has established the Community Foundation’s first-ever fund focused specifically on promoting justice. As a permanently endowed field of interest fund, the Justice Fund recognizes Mary’s wish that every person have equal and unencumbered access to justice. She wants to help ensure that injustice is addressed through the law, with an emphasis on the needs of people marginalized by discrimination, poverty, immigration issues, violence, lack of affordable housing, difficult access to voting or inequitable prison conditions.

The Community Foundation was the perfect fit as a trusted steward to ensure that the mission of NECASA endures. Diane Manning, President/CEO of United Services and Former NECASA Board Member

The NECASA Legacy Fund will help to reduce the incidence and prevalence of substance abuse in Northeastern Connecticut by providing grants to nonprofit organizations, municipalities and school districts based in the Windham and Tolland County towns formerly served by NECASA.

NECASA Leaving a Legacy Forever

Formed in 1990, Northeast Communities Against Substance Abuse (NECASA) became the second Regional Substance Abuse Action Council established in Connecticut. After 28 years of providing substance abuse and suicide prevention information and training throughout the twenty-one towns in Northeast Connecticut, a statewide reorganization of these councils led the Board of NECASA to seek a new home for their assets. According to Bob Brex, founding Executive Director of NECASA, “The Community Foundation, with its deep commitment to donor intent, was the best partner. We knew that establishing a permanently endowed field of interest fund would allow us to transform NECASA’s mission into a legacy in the Northeast region forever.”

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At the Community Foundation of Eastern Connecticut, we are committed to stewarding the funds entrusted to us by our donors to get as many dollars as possible out to the causes, nonprofits and communities they care about.

Our Approach

Our Investment Committee consists of board members and volunteers with extensive institutional investment experience and varied perspectives. With oversight by the Board, it is responsible for developing and implementing our investment policy, recommending investment managers and monitoring investment performance. The committee works with our investment managers at Brown Brothers Harriman (bbh.com) and Walden Asset Management (waldenassetmgmt.com) to preserve and grow the endowment through prudent investment strategies.

Our three-pronged asset-allocation approach centers on growth, risk reduction and inflation protection.

- All our donors’ funds are pooled together and invested in a well-diversified portfolio, which includes large, midsize and small-cap U.S. equities, international equities, real estate, alternatives and fixed-income securities (bonds).
- Both portfolios are designed to reduce exposure to tobacco-related products and fossil fuels. They have no direct exposure to gun manufacturers or distributors. Additionally, our Walden portfolio applies Environmental, Social and Governance (ESG) screens to our investments and also excludes companies involved in animal testing.

The Community Foundation of Eastern Connecticut has partnered with Brown Brothers Harriman since 2009 and Walden Asset Management since 2016 to manage our investment portfolios.

The Community Foundation’s audit is conducted by BlumShapiro (www.blumshapiro.com). The complete financial statements with accompanying footnotes and Form 990 are available for review at our offices and on our website: www.cfect.org/About/Publications.

2018 New Funds

Thank you to the caring and generous donors who created these new funds in 2018.

Donor Advised

- Maryam Elahi Fund
- Graham-Larsen Family Fund
- Lin and Gladis Klein Fund
- Albert “Bob” and Loretta Robarge Fund
- Schub-Stone Family Fund
- John and Marcella Schweitzer Fund
- Paul J. Sellier Charitable Fund
- Kimberly Frech-Wien Memorial Fund

Field of Interest

- Boys & Girls Club of Southeastern Connecticut Fund
- David and Sherry Drydenck Fund
- Artistic Fund
- John and John Leonard Fund
- NECASA (Northeast Communities Against Substance Abuse) Fund
- Powers Fund
- Tremaine M. Proctor Fund

Designated

- Wilbur E. Carrier Scholarship Fund
- Peter J. Seng Fund
- Southeastern Connecticut Community Land Trust Fund
- Melvin Vascolly & Nona Simon Fund

Scholarship

- William Emberton Scholarship Fund
- Edward C. Farrell Family Scholarship Fund
- Michael Todd Garve Memorial Scholarship Fund
- L. Douglas Nolan Scholarship Fund
- Attorney Tim Spayne Memorial Scholarship Fund

Agency

- Garde Arts Center Endowment Fund
- Higher Edge Scholarship Fund
- Horizons Fund
- Unrestricted
- Durrett-Bortner-Ryder Fund
- Freena Fund
- Arezzo Letteris Peabody Oat & Philip Oat McGee Fund

The astute management of both our portfolios allows the Community Foundation to maintain our spending rule of 5.25% to maximize positive impact in our region. Creating a fund at the Community Foundation allows individual donors to meet their philanthropic goals while being assured that the stewardship of their funds is transparent and secure.

Nicholas Fortun, CFECT Trustee, and Investment Committee Member

For a confidential conversation on how you can start a fund to reflect your giving goals, please contact Alison Woods, V.P. of Development/Executive Director, or Michelle L. Puhlick, Director of Strategic Initiatives, at (860) 442-3572.
**Your Generosity at Work**

2018 Grants

Every grant was made possible through the generosity of people who have created 513 charitable funds at the Community Foundation or who provided support through our Community Leadership Fund and other initiatives, including the Women & Girls Funds, Love Our Libraries Fund, Let’s Read Fund and PAW: People for Animals & Wildlife Fund. By leading and giving together, we have made great things happen in our region. Thank you.

For information about grant cycles, guidelines and deadlines, or for a complete list of grantees, visit cfect.org/Nonprofits.

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**Our Vision For Our Region**

A Healthy, Thriving, Sustainable Eastern Connecticut

**Our Mission**

To put philanthropy into action to address the needs, rights and interests of our community in Eastern Connecticut, while fulfilling the passions of our donors

**Our Values**

Integrity, Inclusivity, Respect, Courage, Collaboration, Transparency, Accountability, Kindness and Empathy

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**By the Numbers**

(\text{in millions})

\begin{align*}
\text{Grants and Scholarships} & : \text{2014} = 6.0, \text{2015} = 6.4, \text{2016} = 6.7, \text{2017} = 6.8, \text{2018} = 6.9 \\
\text{Gifts} & : \text{2014} = 10.4, \text{2015} = 9.3, \text{2016} = 9.2, \text{2017} = 10.5, \text{2018} = 10.9 \\
\text{Assets} & : \text{2014} = 84.5, \text{2015} = 83.3, \text{2016} = 70.1, \text{2017} = 63.3, \text{2018} = 60.1
\end{align*}

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**Grants by interest area**

- **Basic Needs & Rights**: $2,530,722
- **Youth Empowerment**: $2,178,095
- **Environmental**: $1,576,723
- **Women & Girls Funds**: $180,018
- **Animal Welfare**: $175,698
- **Other**: $153,515

**Grand Total**: $6,794,771

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**Presentation of gift from the Lord Foundation to the Higher Edge Scholarship Fund, L to R: Higher Edge Board Chair Gladys Rivera-Griffin; Lord Foundation Trustee Jeffrey V. Lord, Director and Trustee Kathryn F. Lord; Lord Foundation Trustee S. Joel Suisman; Higher Edge Executive Director Theresa M. Armendarez; and Community Foundation President & CEO Maryam Elahi.**
We thank the following professional advisors for their advice and community service:

- Teresa Prue, Jerry Dalmato, Holly Knott, and Kerry Garofano.

The Legacy Society honors those people who have told us of their plans to leave a legacy to the Community Foundation in the future. Requests, charitable trusts and gifts annuities, retirement plans, life insurance...all of these options make it possible for you to provide for the organizations and causes that matter to you after you have considered family and friends.

- The Legacy Society

Leadership of the Estate and Trust Planning Council of Eastern Connecticut
In the year

We are grateful for all gifts, but due to space constraints we have listed gifts of $500 or more made in 2018. For a complete list of donors, please visit our website.

Sally Lyon
Make a difference today for those in need. Donate online.

People Who Care

In the year 2018, the greatest gifts of more than 5,000 individuals and organizations surpassed $1 million in support of initiatives that matter to them and to the well-being of our region.

We are deeply grateful to each and every one of you.

People Who Care
We are proud to be of service to 42 communities in New London, Windham and Tolland Counties:

Ashford  East Lyme  Lyme  Plainfield  Stonington
Bozrah  Franklin  Mansfield  Pomfret  Thompson
Brooklyn  Griswold  Montville  Preston  Union
Canterbury  Groton  New London  Putnam  Voluntown
Chaplin  Hampton  North Stonington  Sprague  Willington
Colchester  Killingly  Norwich  Stafford  Windham
Columbia  Lebanon  Old Lyme  Sterling  Woodstock
Coventry  Ledyard  Plainfield  Stonington
Eastford  Lisbon  East Lyme  Thompson

The Community Foundation of Eastern Connecticut is accredited by the National Standards for U.S. Community Foundations for its commitment to legal compliance, philanthropic best practices and excellence that benefits communities.

ACKNOWLEDGMENTS
We stand upon the shoulders of the early Community Foundation Trustees and the generous donors who have created funds that carry on their legacy of caring for their neighbors. This Annual Report is dedicated to all of them.

IMAGE CREDITS
Cover: The Roger Tory Peterson Estuary Center, CT Audubon Society
Page 2: Jeanne Potter
Page 3: Connecticut Forest & Park Association
Page 10 & 11: Ron Pariser
Page 13: CT Food & Farm

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