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

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

2004 highlights
Michael 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.”
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
  **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
- 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

**ENVIRONMENT**
- Avalon 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

**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
- Historical 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

**THE COMMUNITY FOUNDATION OF SOUTHEASTERN CONNECTICUT**
### Social Services

<table>
<thead>
<tr>
<th>Organization</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Moveable Feast</td>
<td>$3,200</td>
</tr>
<tr>
<td>Care and Share Soup Kitchen</td>
<td>$2,000</td>
</tr>
<tr>
<td>City of New London - Dept. of Health &amp; Social Services</td>
<td>$8,136</td>
</tr>
<tr>
<td>Connecticut Legal Services</td>
<td>$12,500</td>
</tr>
<tr>
<td>First Step</td>
<td>$1,785</td>
</tr>
<tr>
<td>H.O.P.E.</td>
<td>$7,500</td>
</tr>
<tr>
<td>Martin House</td>
<td>$5,764</td>
</tr>
<tr>
<td>New London Community Meal Center</td>
<td>$5,000</td>
</tr>
<tr>
<td>Opportunities Industrialization Center (OIC)</td>
<td>$7,500</td>
</tr>
</tbody>
</table>

### United Community & Family Services

- Parent aide program for low-income families in New London County: $5,000
- Project Warm-Up heating oil assistance: $12,500
- Care for homeless in New London County: $5,000
- Theater arts program: $7,500

**TOTAL:** $38,385

### Grand Total Competitive Grants

**$392,896**

### 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.

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

**TOTAL CIMA GRANTS:** $16,333

### Total Designated Grants

**$57,295**

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**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

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**THE COMMUNITY FOUNDATION OF SOUTHEASTERN CONNECTICUT | 9**
grants from donor advised funds

These organizations represent the interests our donors support through their donor advised funds:

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

- Scholarship 20%
- Let’s Read 4%
- Donor Designated 6%
- Women & Girls 5%
- CIMA 2%

Donor Advised 24%
General Grants (Competitive) 39%
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.

*continued on page 12*
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.
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. Jean Caron
Ms. Melinda Carlisle
Patricia Butterworth
Nancy Brundage and Louise Lynch
Lisa H. Brownell
Gail Brown
Van Brown and Wanda Tillman
Ms. Susan Christopher
Mrs. Bettie Chu
Mr. and Mrs. Frank V. Church
Ms. Susan H. Cihocki
Ms. Sharon D. Clark
Ms. Anne Clement
Mr. and Mrs. James L. Coker
Ms. Michaele C. Cooke
Ms. Pam Cronin
Ms. Rebecca Crosby
Mrs. Mary Dangremond
Mrs. Aix DeGuise
Mr. and Mrs. Karedon the Tex
Ms. Kathleen M. Devine
Ms. Mildred E. Devine
Ms. Stacie DiScipio
Mrs. Mary A. Doherty
Ms. Marion Doron
Mrs. Susan S. Ebersole
Mr. and Mrs. Anthony Enders
Ms. Joan Evans-Hunter
Ms. Jayne Fawcett
Alice F. Fitzpatrick
Ms. Gillian Howell
Dr. Bettye R.J. Fletcher
Ms. Catherine Foley
Ms. Sandra Bender Fromson
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Mr. Graham Gavert
Lois Geary
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Lorraine Grader
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Ms. Cynthia J. Hatfield
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Rita Hendel
Mrs. Jeanette Hersey
Ms. Kathleen Hertenstein
Dr. and Mrs. Barrie Hesp
Ms. Nancy J. Hillery
Lisa Holmes
Ms. Catherine Horne and
Ms. Rosemary McBride
Nancy Hutson
Ms. Catherine D. Irwin
Mary Ellen Jukoski and
Matthew McLoughlin
Mr. and Mrs. Saul Kadin
Mr. Richard Kimball and
Rev. Anne Kimball
Suzanne Kitchings Esq.
Mr. Chester W. Kitchings, Jr.
Ms. Patricia C. Kitchings
Diane and Mari Kodama
Eleanor Krusewski
Ms. Shirley S. Langford
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Ms. Sarah McGirr
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Irene Miller
Carol Milne
Mary Mirabito
Emily Mitchell
Mrs. Elizabeth L. Moore
Mrs. Nancy Moreland
Mrs. Sally Myers
Dr. and Mrs. John Niblack
Ms. Mieke Nicholas
Mrs. Judith Nickerson
Ms. Jennifer R. O’Brien
Ms. Margaret O’Brien
Dr. Deirdre O’Connor
Ms. Betty O’Donnell
Maureen O’Gorman
Dr. Margaret O’Shea
Mrs. Elisa Olsen
Ms. Julie A. Olson
Ms. Libby Orvedal
Mrs. Gertrude Ott
Mrs. Donna Pedace
People’s Bank
Mrs. Elaine Perry
Mrs. Evelyn Peyton
Mrs. Constance Pike
Mrs. Betty A. Pinson
Susan Pochal, Esq.
Mrs. Marcy Porter
Mrs. Susan Potter Wood
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Jonathan White
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Ms. Nan C. Scheiber
Mr. and Mrs. Thomas E. Schellens
Mr. and Mrs. Ernest Schlesinger
Joyce Schmidt
Mrs. Gail Schwenker Mayer
Mrs. Robert D. Scott
Mrs. Cecilia Seeley
Mrs. Denise Shafner
Ms. Leila Shakkour
Mr. and Mrs. Edward Shapiro
Ms. Ruth Sjursen
Mr. & Mrs. Sherwood T. Small
Mr. and Mrs. Lawrence 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. Walier
Ms. Jane Walsh
Mrs. Pamela Walsh
RADM and Mrs. Thomas T.
Wetmore, Ill
Mrs. Shelley White
Mr. and Mrs John Whitmer
Mrs. Cynthia Willauer
Ms. Heather Lathrop Williams
Alison Woods
York Correctional Institution
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—providing 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
Students from Winthrop Elementary School and Connecticut College participate in a KBA program at Connecticut College Arboretum.
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. 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.
The Community Foundation of Southeastern Connecticut

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

Lyme’s 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 reading 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

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.

“Not all readers are leaders, but all leaders are readers.”
– Harry Truman

let’s read 2004

Let’s Read

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

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


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


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

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

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

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


Beverly G. and George P. Letz Scholarship: Chadenza 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.


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

Gilbert Mead Memorial Scholarship: Jeremy Davis, Old Lyme.


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: Lacrisha Evans, 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 Cifigu, Jiang Zheng, Morris Wright of New London; Hailie Bomster, Janine Conklin, Justine Banker of North Stonington, Blair Kauffman, Charles Plungis, Christopher Moore, Michael Matias, Brendan McGee of Groton; Jayme Keeling, Jonathan Keeling of Lyme; Carine Dodge, Laura Neville, Marybeth Falalia, 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, Britney Tree, Jenna Head, Ann Marie Rynning of Montville.
THE SEAN DUZANT MEMORIAL SCHOLARSHIP FUND

We 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.
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 Stroehlitz 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 Elvira 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. Korolckiewicz 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 Tuneshi/Sheloff 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 Kolts 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 Stubbeffield 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 at Syracuse University
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

1999 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 Alliott 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
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

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
Mrs. & Mr. 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 Mystic Village
Mr. and Mrs. Philip Turner
Mr. and Mrs. Robert Rutman
Mr. and Mrs. Carl Safford

$2,000 - $4,999
Mr. Walter V. Baker

Friends of Ahn Chanawongse
(Nowhere Café)
Citizens Bank
Mr. and Mrs. Karel den Tex
DiCesare-Bentley Engineers, Inc.
Ms. Marion Doro
Dr. and Mrs. R. Gordon Douglas
Dr. Leslie J. Drake
Friends of Sean Duzant
(Millstone Nuclear Power Plant)
Mr. and Mrs. Daniel Duzant
Mr. Jeffrey A. Duzant
Mr. and Mrs. James F. English
Foxwoods Resort Casino
Mr. and Mrs. Marc Ginsberg
Mr. and Mrs. Robert A. Hendel
Mr. George J. Jagger
Mr. and Mrs. John Kashanski
Mr. and Mrs. Richard E. Kenyon
Dr. and Mrs. Robert Langmann
Mr. and Mrs. Reid MacCluggage
Mr. Stephen M. Marcus
Linda Mariani, Esq.
Friends of Juliana McCourt Fund (New London Police Department)
Mary Jane McGinnis
Mystic Seaport
Mr. and Mrs. Freeman Patten
Rotary Foundation of New London
Russell Investment Group
Ruth Saunders and Jonathan White
Mr. and Mrs. David Sistare
Stonington Education Fund*
Van Brown and Beth Tillman
George and Cynthia Willauer
Mr. David Zuckerbraun
Mr. Joel Zuckerbraun

$1,000 - $1,999
A. L. Levine Family Foundation
Advest, Inc.
Anonymous
Mr. and Mrs. Maxwell M. Belding
Mr. Peter Block
Neal & Jane Lassen Bobruff
Ms. Maura Casey
Mrs. Steven M. Castle
Mrs. Anne Clement
Mr. and Mrs. Timothy H. Cronin
Mr. Bruce Dean
Dime Bank
Rev. and Mrs. Dwight Dutton
Mr. and Mrs. Michael Duzant
Mr. Stan Pape and Mrs. Ingrid Feddersen
Alice F. Fitzpatrick
Abigail P. & Charles S. Glassenberg
Mr. and Mrs. Peter A. Harvey
Rita Hendel
Mr. Peter G. Hewitt
Ms. Diane Klotz
Mr. and Mrs. David A. Krampitz
Dr. & Mrs. John LaMattina
Jenny D. Lassen
Dr. Dorothy L. Leib
Dr. and Mrs. William A. Lieber
Mrs. John T. MacDougall
Dr. and Mrs. James M. McCormick
Ms. Sandi McCourt
Mrs. Nancy Moreland
Mr. and Mrs. Granville R. Morris
Mr. and Mrs. Robert Myers
The Nutmeg Foundation
Ms. Julie A. Olson
Mr. and Mrs. Daniel P. O’Shea
Mr. and Mrs. Paul Patchen
Mrs. Constance Pike
Mrs. Betty A. Pinson
Mr. and Mrs. John Rafal
Mr. and Mrs. Robert Reardon
Ms. Kate Robins
Mrs. James A. Torrance
Waterford VFW - Post 6573
Dr. and Mrs. Henry Wolfe
Mr. and Mrs. Lisk Wyckoff

$500 - $999

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becoming a donor

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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jessica@cfsect.org

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jennob@cfsect.org

Alison Woods, Director of Development
alison@cfsect.org

Edward Wozniak, Chief Financial Officer
ewozniak@cfsect.org

* Trustees

The Community Foundation of Southeastern Connecticut 2004 staff.
The Legacy Society
Established in 1997 to recognize friends of The Community Foundation who have made, or intend to make, planned gifts to benefit the Foundation. Bequests, trusts, gift annuities, and our pooled income fund are the usual vehicles for such generous consideration of the future.

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Bangkok City
Block Island Ferry
Bob’s Discount Furniture, Inc.
Captain Daniel Packer Inne
Children’s Museum of Southeastern Connecticut
Denison Pequotsepos Nature Center
E. Johnson Florist, Inc.
Eastern Connecticut Symphony Orchestra
F & F Distributors Inc.
Garde Arts Center
GEICO Insurance
Gordon’s Yellow Front Package Store
Heads Above the Rest
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JTK Management
Lighthouse Inn
Lyman Allyn Museum of Art
Mashantucket Pequot Tribal Council
Michael’s Dairy
Mohegan Sun Resort
Noah’s Restaurant
Norwich Navigators
Olio Restaurant
Recovery Room
Roberts Audio - Video
Schooner’s Restaurant
Jeanne Sigel
Stop & Shop
Summer Music
Tony D’s
Utopia Total Salon
Waterford Hotel Group, Inc.
Waterhouse Salon
Zach’s Bar & Grill

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Arnold W. Avery
Russell Baline
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Estelle Hebert Bigley
Jane Lassen Bobruff
Selma Bruckner
Philomena Buscetto
Galey Chapman
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**Statements of Financial Position** 2004

**Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>2004</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$44,648</td>
<td>$25,661</td>
</tr>
<tr>
<td>Investments</td>
<td>19,207,806</td>
<td>17,254,684</td>
</tr>
<tr>
<td>Receivables</td>
<td>64,354</td>
<td>427,464</td>
</tr>
<tr>
<td>Split-interest agreements</td>
<td>4,820,305</td>
<td>4,755,697</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>300,385</td>
<td>313,623</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$24,437,498</strong></td>
<td><strong>$22,777,129</strong></td>
</tr>
</tbody>
</table>

**Liabilities and Net Assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>2004</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>128,042</td>
<td>123,252</td>
</tr>
<tr>
<td>Liability Under Gift Annuity</td>
<td>8,130</td>
<td>8,321</td>
</tr>
<tr>
<td><strong>Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board Designated</td>
<td>736,363</td>
<td>62,9076</td>
</tr>
<tr>
<td>Undesignated</td>
<td>18,735,253</td>
<td>17,262,803</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>233,999</td>
<td>248,113</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>4,595,711</td>
<td>4,505,564</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>24,301,326</strong></td>
<td><strong>22,645,556</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$24,437,498</strong></td>
<td><strong>$22,777,129</strong></td>
</tr>
</tbody>
</table>

**Endowment Growth**

- 1995: $0
- 1999: $25,000,000
- 2002: $20,000,000
- 2004: $25,000,000
### REVENUES, GAINS AND OTHER SUPPORT

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>2004 Total</th>
<th>2003 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$1,302,181</td>
<td>$44,100</td>
<td>$</td>
<td>$1,346,281</td>
<td>$1,588,214</td>
</tr>
<tr>
<td>Change in split-interest agreements</td>
<td>1,546</td>
<td>13,580</td>
<td>(73,559)</td>
<td>(58,433)</td>
<td>366,183</td>
</tr>
<tr>
<td>Change in value of perpetual trust</td>
<td>163,706</td>
<td></td>
<td>163,706</td>
<td></td>
<td>360,243</td>
</tr>
<tr>
<td>Investment Gains</td>
<td>1,272,564</td>
<td></td>
<td></td>
<td>1,272,564</td>
<td>2,085,406</td>
</tr>
<tr>
<td>Investment income</td>
<td>503,864</td>
<td></td>
<td></td>
<td>503,864</td>
<td>845,172</td>
</tr>
<tr>
<td>Special events (net)</td>
<td>21,418</td>
<td></td>
<td></td>
<td>21,418</td>
<td>24,818</td>
</tr>
<tr>
<td>Rental income</td>
<td>18,480</td>
<td></td>
<td></td>
<td>18,480</td>
<td>7,240</td>
</tr>
<tr>
<td>Total</td>
<td>3,120,053</td>
<td>57,680</td>
<td>90,147</td>
<td>3,267,880</td>
<td>5,277,276</td>
</tr>
<tr>
<td>Less investment fees</td>
<td>(114,223)</td>
<td></td>
<td></td>
<td>(114,223)</td>
<td>(92,284)</td>
</tr>
<tr>
<td>Total support</td>
<td>3,005,830</td>
<td>57,680</td>
<td>90,147</td>
<td>3,153,657</td>
<td>5,184,992</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>71,794</td>
<td>(71,794)</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>Total revenues, gains and other support</td>
<td>3,077,624</td>
<td>(14,114)</td>
<td>90,147</td>
<td>3,153,657</td>
<td>5,184,992</td>
</tr>
</tbody>
</table>

### EXPENSES

**Program services:**

<table>
<thead>
<tr>
<th></th>
<th>2004 Total</th>
<th>2003 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants &amp; Scholarships</td>
<td>1,026,769</td>
<td>1,051,666</td>
</tr>
<tr>
<td>Other grant expenses</td>
<td>139,105</td>
<td>147,580</td>
</tr>
<tr>
<td>TOTAL PROGRAM SERVICES</td>
<td>1,165,874</td>
<td>1,199,246</td>
</tr>
<tr>
<td>General &amp; administrative expenses</td>
<td>332,011</td>
<td>331,614</td>
</tr>
<tr>
<td>TOTAL EXPENSES</td>
<td>1,497,885</td>
<td>1,530,860</td>
</tr>
</tbody>
</table>

### INCREASE (DECREASE) IN NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>2004 Total</th>
<th>2003 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET ASSETS - BEGINNING OF YEAR</td>
<td>17,891,877</td>
<td>18,991,424</td>
</tr>
<tr>
<td>NET ASSETS - END OF YEAR</td>
<td>19,471,616</td>
<td>22,645,555</td>
</tr>
<tr>
<td>NET ASSETS - END OF YEAR</td>
<td>233,999</td>
<td>24,301,326</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,595,711</td>
<td>22,645,555</td>
</tr>
</tbody>
</table>

Martin House residents working on a community project.
THE COMMUNITY FOUNDATION
OF SOUTHEASTERN CONNECTICUT
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New London, CT 06320

(860) 442-3572 • WWW.CFSECT.ORG