

# Good People Great Things

It was "Girls Night Out" August Thursdays in Chester. Many took advantage of Restaurant duVillage's wonderful prix fixe dinners that raised nearly \$1,400 to benefit the Fund for Women & Girls. From left Carol Strickland, Arlene Mazzotta, Kathleen Stolzenberger, restaurant owner Cynthia Keller and Nan Zimmer relaxed after dinner on August 17.

FALL 2006



## [ RIVER VIEW CEMETERY: UNIQUE PARTNER ]

Why would a cemetery join forces with the Community Foundation? "Timing and mutual benefit," according to Roger Field, President of the River View Cemetery (RVC) in Essex. "Just when the RVC Board was looking for a meaningful way to invest some of its earnings for community good, the Community Foundation was growing its grantmaking and endowment. We explored options and decided to use the Foundation's grantmaking expertise to distribute grants in our name.

(continued inside)

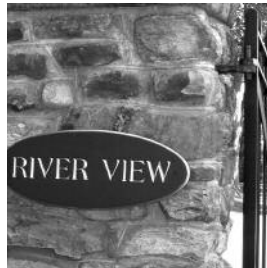
RIVER VIEW CEMETERY THANK YOU RECEPTION AT THE CONNECTICUT RIVER MUSEUM IN JUNE



Tom Briggs, Community Music School, entertained the 120 guests



Offering thanks for grants was Ivoryton Playhouse's Executive Director, Jacqy Hubbard



River View Cemetery was celebrated at a summer Reception at the Connecticut River Museum



More thanks were offered by Executive Director, Mitzi Eilts of the Estuary Council of Seniors



Foundation Board Member Marcia Kalayjian and Bonnie Bennet decorated with flowers

# *To date we have awarded 54 grants benefiting residents of Clinton to Chester...all with RVC funds.*

## [ RIVER VIEW CEMETERY, CONTINUED FROM FRONT ]

We started with a small amount that has grown over the years. We are most grateful to the many grantees that are doing great things with our support. We couldn't be happier with their work and the results of partnering with MCCF."

RVC has provided \$144,500 since 2000 to aid organizations serving Essex and the Lower Valley area. "These funds have increased our grantmaking impact while we are growing our endowment," said Robert Kirkpatrick, Grants Committee Chair. "To date we have awarded 54 grants benefiting

residents of Clinton to Chester; toddlers to seniors, from arts and environment to people in need through soup kitchen and education programs...all with RVC funds. We are very grateful to this partnership that is helping improve our communities through the Community Foundation."

RVC also established an endowed unrestricted fund that has provided four additional grants totaling \$5,300. To recognize their many contributions and show appreciation to the board and members of RVC, the Community

Foundation held a Thank You Celebration at the Connecticut River Museum, one of the recipients of several grants from RVC funds. An anonymous sponsor made possible the grand evening enjoyed by grant recipients, Foundation friends and RVC members.

The Community Foundation has three other consistent grantmaking partners; the Connecticut Humanities Council, Citizens Bank and the Ann T. D'Addario Family Foundation. The four partners have provided \$260,000 for grantmaking.



John S. Biddiscombe of Durham

### BOARD ENHANCED WITH NEW MEMBERS

*N*ew ideas, perspectives and contacts are important ingredients in growing our Community Foundation. We welcome three newly elected members to our Board of Directors.

JOHN S. BIDDISCOMBE has been the Director of Athletics, Chair of Physical Education and Adjunct Professor at Wesleyan University since 1987. He has been active in regional and national professional organizations. He has held many volunteer positions with Middlesex United Way and is winner of their Community Service Award.



William C. Chatman of Essex

WILLIAM C. CHATMAN has retired to Essex from a career working for Foster Wheeler Ltd., the British affiliate of an American-based company, for which he worked 44 years in many countries. He wasted no time in getting involved in local activities by serving on the boards of the Essex Historical Society and Connecticut River Museum and, most recently, chair of the Essex Library Expansion Capital Campaign.



Deborah L. Moore of Killingworth

DEBORAH L. MOORE of Killingworth is first Executive Director of the Wadsworth Mansion at Long Hill Estate in Middletown, and has been responsible for its development and its growing success. She serves as Chair of the Central Regional Tourism District, chair of the Special Places for Special Events and is a board member of the Valley Railroad Company.



Butter churning was just one of the new experiences enjoyed by 8- to 12-year-olds at the Haddam Historical Society's week-long summer camp, *A Week in the Life of an Early American Child* c. 1820, supported by a \$2,000 Foundation grant.

## NEW LAW BENEFITS IRA HOLDERS

*In 2006 and 2007, people age 70 1/2 and older can transfer IRA assets each year to public charities, including Middlesex County Community Foundation, without triggering federal and state income taxes today or estate taxes in the future. If married, each spouse is eligible for the tax-free IRA transfer.*

Having more retirement money than you need is a great problem to have, and one that's now easier to solve. Here are three options at the Community Foundation.

### [ 1 ]

#### **MIDDLESEX ENHANCEMENT FUND** *Meeting ever-changing community needs.*

IRA transfers to this Fund address a broad range of current and future needs. The Community Foundation evaluates all aspects of community well-being—arts, education, environment, health and human services—and awards grants to select projects and programs.

### [ 2 ]

#### **FIELD OF INTEREST FUND**

*Connecting personal values to high-impact opportunities.* IRA transfers to Field of Interest Funds allow donors to target gifts to causes important to them: arts, environment, heritage enhancement, positive youth development, and more. The Foundation awards grants to community organizations and programs addressing the donor's specific interest area on a competitive basis.

### [ 3 ]

#### **DESIGNATED FUND**

*Helping local organizations sustain and grow.* IRA transfers to establish Designated Funds allow donors to support the good work of a specific non-profit organization—a local agency, library, or any qualifying non-profit.

Contact your tax advisor or financial planner and then give us a call to discuss how you can make a positive difference today and tomorrow.

TWO OF THE GREATEST MAKE GREAT THINGS HAPPEN

Many would call it more than a coincidence that when Bob Herbst and Joe Lombardo met for the first time earlier this year, they agreed to a plan to provide immediate benefit for the Foundation.

The two men, who discovered they share a birthday, also found they shared a passion for supporting worthwhile causes. Herbst, an Essex resident and board member of the River View Cemetery, learned about the Community Foundation and its mission when the two organizations began working on joint projects in 2000. Lombardo, a Middlefield resident, is a Founding Director of the Foundation, where he served eight years on the board and established two endowed funds.

After they met, they launched the President's Society to provide "operating support until such time as its capital base can fully support its modest administrative costs."

The two men invited a select group of county residents and business people to contribute \$1,000 or more. For every two dollars raised by these gifts, The Clark Group, Middlesex Mutual Assurance Company and Whelen Engineering will contribute an additional dollar.

The President's Society now has 38 members. Others are welcome to join. A sponsored thank you luncheon at Restaurant duVillage is being planned for all members.

Patti Anne Vassia, president of the Foundation, called Lombardo and Herbst "two of the greatest from the greatest generation. They make great things happen."



Bob Herbst and Joe Lombardo shared their enthusiasm for the new President's Society at the River View Cemetery Reception.

FOND, YET SAD, FAREWELL

Bonnie Bennet has left the Foundation to become the staff attorney for the Probate Court. We are grateful for her dedication and outstanding work in grantmaking and programming that helped us gain compliance with the National Standards.

Volunteers and present staff will assume her responsibilities while we assess future staffing.



A GIFT THAT GIVES IN MANY WAYS

Few people would turn down a chance to earn up to 8 percent annual interest for the rest of their lives. Even fewer would decline if they knew they could help a favorite charity at the same time.

Foundation Board member David Preston of Old Lyme, who chairs the Development Committee, saw a magnificent opportunity and took the initiative to create the Foundation's first Charitable Gift Annuity earlier this year.

"I believe in the leadership that the Foundation offers," Preston said. "And Barbara and I wanted to contribute to its capital base and at the same time preserve some income for ourselves."

A CGA is a contract that allows a donor to make a gift of money, appreciated stock, or other assets to the Foundation and receive income at a fixed rate for life. The older the donor, the greater the rate of return. At the death of the donor or the person designated to receive the income, the Foundation will receive the remainder

of the gift to distribute according to the donor's wishes. This could be unrestricted, or designated to a field of interest, town or specific charity.

Other benefits to the donor also include:

- Federal income tax deduction
- Potential reduction in probate fees and estate taxes
- Support for charities

Anyone interested in learning more can contact the Foundation or ask a financial planner.

SAMPLE PAYMENT RATES

Your Age	Payment Rate
60	5.7%
65	6.0%
70	6.6%
75	7.1%
80	8.0%
85	9.5%
90	11.3%

# Good People Great Things

FALL 2006

*Dear Friend of the Community Foundation,*

*Just nine years ago the Middlesex County Community Foundation began a new accountable way to meet the changing needs of our community's non-profits, and a better way for individuals to donate to the well being of our community.*

*By the end of this year, we will have distributed more than \$807,000 to more than 125 local non-profit organizations. Joining with others and benefiting from the wise investment of our more than \$2.7 million endowment, we award grants to improve the arts, education, environment, heritage treasures and health and human services. Our grants are making a positive difference across the county. Our future is bright with known planned gifts that one day will bring us another \$6.5 million.*

*We have made great progress in a short amount of time, but we are still small. Until we have a much larger endowment, we must rely on yearly support to defray most of our annual administration costs. Understanding this need, this year 38 individuals and businesses have joined our new President's Society and have given or pledged \$1,000 or more for operations. We are enormously grateful for their leadership, but we will still need more help while we grow.*

*Fortunately, The Clark Group, Middlesex Mutual Assurance and Whelen Engineering have agreed to help us by matching \$1 for every \$2 given or pledged for operations. Your year-end gift can help us secure the much needed match.*

*Please do what you can to help by using the enclosed reply envelope. We appreciate your consideration and wish you a most happy holiday season.*



HERBERT T. CLARK III  
BOARD CHAIR



DAVID PRESTON  
DEVELOPMENT COMMITTEE CHAIR

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COMMUNITY FOUNDATION

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#### COMMUNITIES SERVED

*Chester / Clinton / Cromwell / Deep River / Durham / East Haddam / East Hampton / Essex / Haddam / Middlefield / Middletown  
Portland / Killingworth / Old Saybrook / Westbrook*

### [ WEBSITE WINS NATIONAL AWARD ]

Everything you need to know about our Community Foundation is at [www.MiddlesexCountyCF.org](http://www.MiddlesexCountyCF.org). The site won a national silver award from the Council on Foundations' 2006 Wilmer Shields Rich Awards Program for Excellence in Communications for foundations and corporate giving programs. Visit our website to learn more about the types of donations you can make, the grants we have awarded and our new section on planned giving.



The Middlesex County Community Foundation is a non-profit organization dedicated to improving the quality of life in Middlesex County. Our mission is to work with charitably-minded individuals and organizations to build permanent endowments and other charitable funds, and to support local non-profit organizations through effective grantmaking to address community needs.

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