Funds for Today
Roots in the Community
The Promise of Tomorrow
PHILANTHROPY MATTERS

• Despite the economy, you - our founders, donors, stakeholders – continued your generous ways by donating over $1 million in gifts and pledges for the third consecutive year to the Community Foundation for the present – and future – good of all in Middlesex County.

• Fourteen (14) donors established new Funds to benefit nonprofit organizations for generations to come through grants, and thus brighten the lives of those they serve.

• Planned gifts grew to $13.3 million as seven (7) individuals added their names to The Legacy Society knowing that they will make a difference in the lives that follow through our Community Foundation.

• The President’s Society expanded to add the Chairman’s Circle. Sixty-eight (68) generous individuals donated $1,000 or more for our operations as new community members joined forces to help support the Community Foundation’s future.

PHILANTHROPY WORKS

• Through grants of over $230,000, the Community Foundation’s investment in Middlesex County continued. Since our founding, the Community Foundation has assisted more than 170 nonprofit organizations with over $1.5 million which enabled them to continue their good works in the arts and culture, environment, animal welfare, health and human services, heritage enhancement and education.

• Once again, our grant making partnerships with Connecticut Humanities Council, River View Cemetery, and the Ann T. D’Addario Family Foundation added to earnings from our individual donor funds to support our nonprofits organizations and their extraordinary work and services.

• The Nonprofit Resource Center continued to provide free monthly seminars and workshops for nonprofit organizations and their staff and volunteers. The Nonprofit Resource Center expanded its offerings with free webinars in partnership with the Association of Fundraising Professionals and by launching half-day sessions with nationally recognized experts in the field of nonprofit governance and fundraising.

• Our LIVE LOCAL GIVE LOCAL initiative began to remind all that COMMUNITY matters. A LIVE LOCAL GIVE LOCAL Fund was established with 100% of the proceeds donated to local nonprofits.
2009 Annual Report Letter

LIVE LOCAL GIVE LOCAL…the words are simple, yet profound.

They tell the story of Middlesex County Community Foundation's stakeholders…neighbors determined to help neighbors and to give back to the community that has given us so much.

With support of many, and the tremendous dedication of the Board of Directors, our Community Foundation continued to improve the quality of life for all in Middlesex County during 2009. Our record amount of grants combined with new Funds and Planned Gifts position our Community Foundation for a bright future and the continued ability to impact lives and support meaningful initiatives for the good of all in our region. Indeed, once again, your generosity helped us realize over $1 million in new gifts and pledges for the third consecutive year. Under the excellent leadership and guidance of our Board of Directors and Finance & Investment Committee, our portfolio recovered from the economic downturn beyond expectations. We continue to meet or exceed our benchmarks in performance, and we have been proactive in monitoring the market and investments on a regular basis to ensure the long-term viability and sustainability of your funds, thus providing long-term support to an organization about which you care.

There are many other reasons to celebrate. The Community Foundation was recognized in 2009 by its nonprofit colleagues for its support of their good works and initiatives. We gratefully accepted two prestigious awards on behalf of all in the region: the Special Merit Award for the “Greening Our Valley” Library Initiative given by the Connecticut River Coastal Conservation District, and recognition by the Connecticut Library Consortium for the “Greening Our Valley” Library Initiative. We were grateful to be recognized by Director Emeritus Willard McRae, as he accepted the Liberty Bank Community Diversity Award, now renamed in his honor.

We are pleased to note that our list of Directors Emeriti has expanded. David Preston was unanimously elected in 2009 in recognition of his many contributions to the Community Foundation. His passion to give back, his energy and his enthusiasm for Middlesex County Community Foundation are inspiring. We are so pleased that he will continue to remain active with the Community Foundation and share his wisdom and expertise.

As we move ahead, our mission to improve the quality of life in Middlesex County remains unchanged. Joining us in this effort on the Board of Directors is new member Sharon Griffin of Durham, who brings an abundance of knowledge about our community and a passion for philanthropy. We also acknowledge the contributions of our strong and able staff who add to our ability to continue to “help good people do great things.”

As always, our Board of Directors joins us in thanking you for your loyal support. We hope that you will share your enthusiasm about our successes by telling others about your Community Foundation, by establishing a Fund, donating to help us meet our operations challenges or making a planned gift for the future benefit of the community.

We maintain our strong sense of responsibility and financial stewardship to continue the hard work that brought the Community Foundation to its current place. A place where philanthropy grows, thrives and changes lives – today and in the future. Together, we will certainly “help good people do great things.” We continue to understand that our responsibility is to give back to a region that has given us so much. We LIVE LOCAL and GIVE LOCAL to improve the quality of life for all. We know that our community’s potential is unlimited if we demonstrate that PHILANTHROPY MATTERS and PHILANTHROPY WORKS.

Finally, we dedicate this report to Mary Ann Lambert, our dear friend and colleague, who exemplified “good people doing great things.” She is missed each and every day.

David M. Royston
Chairman, Board of Directors

Cynthia H. Clegg
President & CEO

P.S. This report is late and we apologize. The Community Foundation extends its sincere thanks to you for your patience and to our sponsor, Pratt & Whitney, for its understanding.

MARY ANN LAMBERT

Middlesex County Community Foundation lost a dear friend and colleague, Mary Ann Lambert, in August. Mary Ann demonstrated strength, compassion – and humor – every day she worked for the Community Foundation.

Mary Ann personified the word “caring” and just loved being with her family. She was intensely devoted to her husband, Marc, and her children, Jason, William and Elizabeth and spent countless hours volunteering to assist in their childhood activities.

While there are many ways to define Mary Ann – friend, colleague, CPA, volunteer – the two words she proudly stated, without hesitation, if you asked her to describe herself were “wife” and “mother”.

Mary Ann gave so much more to Middlesex County Community Foundation than she ever received in compensation. We dedicate this annual report to her fond memory and extend our heartfelt sympathies to her family and many, many friends.
12 Years of Community Impact

Deborah Petruzzello speaks at the MCCF Fund for Women & Girls Reception about Girls Night Out

ARTFarm brings Shakespeare to life, Taming of the Shrew

Rushford Center’s Girl Talk promotes self confidence

Oddfellows Playhouse Arts Explorers

Region 4 Early Childhood Council provides high quality preparation for pre-school

Literacy Volunteers of Central Connecticut aid in language skill development for the workplace
**Middlesex County Nonprofit Resource Center Focuses on Governance, Communication and Advocacy**

Providing no-cost and low-cost nonprofit training is particularly important during these difficult economic times, and with the generous support of Citizens Bank, the Community Foundation continued to ensure that our nonprofit organizations have access to local professionals on valuable topics. Middlesex County Nonprofit Resource Center [NPRC] served over 430 staff and volunteers from more than 260 nonprofit organizations this year with a variety of programs focused on sustainability, governance and outreach. *Morning Musings* remain one of the most popular series offered, connecting trainers and experts with nonprofit organizations in one-hour workshop sessions. Topics in 2009 included Crisis Communication, Public Speaking, Grant Writing, Social Media and Donor Retention.

MCCF’s commitment to the nonprofit organizations serving our communities includes working with them to identify issues and crises which directly affect programs and services. The Community Foundation held a “Listening Forum,” inviting staff and volunteers of Middlesex County nonprofit organizations to spend a morning with MCCF staff, Board members and Grants Committee volunteers. The discussions included examples of how the economic downturn has shaped organizations’ programs and services, as well as what the Community Foundation can do to assist local nonprofit organizations.

The Community Foundation partnered with Middlesex County leaders in 2009 to provide valuable workshops on topics of great import. With partner Liberty Bank Foundation, MCCF brought nationally recognized trainer Chuck Loring for a half day workshop on Nonprofit Governance in February. 135 participants from 49 organizations spent a lively afternoon learning trends, roles and responsibilities of strong board governance.

With the support of TD Bank, MCCF offered free webinars through the Association of Fundraising Professionals (AFP) to Middlesex County nonprofits. These hour and a half-long webinars bring experts in fundraising together with staff and volunteers and cover such topics as *Update on the Economy, Turning Conflict into Strength, and Conversations with Donors about Planned Gifts.*

The economic climate impacted all nonprofit organizations this year. In June, Middlesex County Chamber of Commerce hosted a “Meet the Funders” forum facilitated by the Community Foundation. Representatives from Liberty Bank Foundation, Middlesex United Way, Comcast, Aetna and the Community Foundation presented the processes and criteria each organization utilizes in reviewing grant requests. Over 100 organizations participated in the session, which also included a comprehensive dialogue on ways to improve grant making procedures especially in these difficult economic times.
As Middlesex County continues to persevere in the economic crisis, the Board of Directors understands that the needs continue to grow throughout our community. They believe in the mission of the Community Foundation to support our nonprofit organizations and approved a total of $233,206 in grants for 2009. Of this amount, $111,475 was competitive; $55,754 designated and $65,140 donor advised.

**Grants for the Arts**

- **Community Music School** / $3,200 / for a development program consultant, fundraising training, donor management software and professionally designed marketing materials.
- **Ivoryton Playhouse Foundation** / $5,000 / to hire technical help to implement an electronic distribution system and marketing expertise to do a marketing analysis, review previous marketing efforts and make recommendations on how to best position the Playhouse as it approaches its centennial year, 2011.
- **NEAR, Inc. Buttonwood Tree** / $1,050 / to update its technology capabilities.
- **Oddfellows Playhouse** / $3,500 / to help fund the Art Explorers program for 35 underserved middle school youth who are at risk of substance abuse, juvenile delinquency and violence by providing professional one-on-one visual, literary or performing arts instruction during the school year for 2 hours per week.

**Grants for Education**

- **Essex Library Association** / $2,500 / for the expansion of its English as a Second Language materials to better serve Spanish and Chinese speaking residents.
- **Literacy Volunteers Valley Shore** / $3,300 / for technology upgrades, including new desktop computers and monitors, software updates and equipment installation.
- **Middlesex Hospital, Family Advocacy Program** / $3,025 / to support “Opportunity Knocks,” a program to empower parents and caregivers of children with challenging behavior through in-home parent education and skill development, and help achieve the community’s goal that no child is expelled from his or her preschool program.
- **Middletown School Readiness Council** / $3,000 / to support a collaborative program with the Connecticut Storytelling Center to bring storytelling performances to 350 low-income preschoolers in eight Middletown preschools. In addition, children receive one free book per month.
- **Mount Saint John** / $825 / to cover half the cost of a full day retreat to galvanize the Board of Directors and professional staff to build organizational capacity.
- **Vista Vocational & Life Skills Center** / $2,000 / for a community education and outreach initiative bringing Vista members into local middle and high schools, as well as other community venues, to speak about living and working successfully with disabilities.

**Grants for the Environment**

- **Connecticut Forest & Park Association** / $4,000 / for a part time staff person to manage member recruitment, assist in developing membership materials and volunteer outreach.

**Grants for Heritage Enhancement**

- **Connecticut Society of the Sons of the American Revolution (CT SAR)** / $3,500 / to purchase a history museum management software package, to launch a special section on its website dedicated to the East Haddam Nathan Hale Schoolhouse; to open an online giving account with Network for Good; and to hire a museum consultant to manage a social media marketing campaign designed to attract local audiences to join as museum patrons.
- **Deep River Public Library** / $5,000 / to purchase a microfilm reader for improved access to “The New Era” a local newspaper dating back to the 1870’s. The Deep River Historical Society has offered to assist in this project.
- **Godfrey Memorial Library** / $5,600 / for an Administrative Librarian who will coordinate entering information and photos; and to upgrade computer equipment with additional server capacity.
- **Portland Historical Society** / $1,625 / to purchase the materials needed to construct audio station podiums at the Ruth Callander House Museum. This is part of a community service Eagle Scout project of Boy Scout Troop 2.
**Grants for Human Services**

**American Red Cross-Middlesex Central Connecticut Chapter** / $4,500 / to provide online information for disaster services, health and safety and community programs, volunteering opportunities and online donations.

**Connecticut Foundation for Dental Outreach** / $5,000 / to provide free dental care to the underserved and uninsured of Middlesex County.

**Estuary Council of Senior Clubs** / $5,000 / to help fund new and replacement commercial grade food service equipment. The kitchen is utilized to prepare meals to congregate meal sites, homebound meals and outreach related events.

**FISH for C.D. & E.** / $2,200 / to provide free transportation to medical, dental and physical rehabilitation appointments for patients in need who are residents of the Lower County.

**Gilead Community Services** / $5,000 / to provide support for clients who have long-term, chronic mental illness and are below the poverty level, as they wait for subsidies to maintain their permanent housing.

**I Have A Friend Youth Center** / $2,500 / to support the after school program that addresses the needs of low income and at-risk children in Middletown ages 6-12. Funding will enable the organization to purchase arts and crafts supplies, field trip expenses, food expenses and insurance.

**Middletown Parks and Recreation Department** / $3,000 / to provide support groups, summer programming, respite and emergency funds to grandparents raising their grandchildren.

**New Horizons Domestic Violence Services** / $3,200 / to provide funding to residents who have made a complete commitment to starting a new, safe, independent life and do not qualify for any of the existing state or federal rental subsidies.

**North End Action Team** / $5,200 / to expand organizing projects and initiatives within the low income North End neighborhood including expansion of the successful Community Conversations, youth programs, educational advocacy and homeownership and financial management programs.

**Shoreline Soup Kitchens and Pantries** / $6,500 / for the purchase of wholesale food to augment food distributed to pantry participants.

**St. Luke’s Eldercare Solutions of Central Connecticut** / $5,000 / to pay for direct volunteer mileage reimbursement and to help defray the costs of taxis to out-of-area medical appointments when no volunteers are available.

**St. Vincent DePaul Place** / $5,000 / to offer financial assistance to prevent eviction and loss of utilities.

**Grants for Other Areas of Need**

**Ray of Light Farm, Inc.** / $2,000 / for funding for the feeding and medical bills of rescued foals, which are the unfortunate by-products of Premarin production by a major pharmaceutical company. The slaughter bound babies are rescued and tamed with the intent of being adopted within 3-4 months.

**Gilead Community Services** / $2,000 / to provide adolescent girls with mental illness with an opportunity to participate in various arts and cultural activities to foster personal growth and build self-esteem.

**Middletown Public Schools** / $500 / to support the "Right Steps" continuum, which includes: Nurturing Families, People Empowering People (PEP), Parent Leadership Training Institute (PTLI), and Parents Supporting Educational Excellence (PSEE).

**Ray of Light Farm, Inc.** / $900 / to support a program which provides young girls with the opportunity to teach adults interested in learning horseback riding and animal care.

**Rushford Center** / $2,000 / to support "Girl Talk" a summer program for at-risk middle school girls in Middletown that focuses on the media, physical activity, nutrition and positive self-image.

**Westbrook Youth and Family Services** / $3,000 / to provide support for Divorced or Separated Women, "Girls Self Esteem Group" and "Women's Support Group".

**Woodrow Wilson Middle School** / $1,850 / to support a one night program for 5th - 8th grade girls and their mothers at Woodrow Wilson Middle School. The program gives mothers and daughters the opportunity to attend classes and spend quality time together.

**Competitive Total $111,475**
2009 Approved Grants from Designated Funds

**INDICATES FUND AND/OR ADVISOR OR DONOR**

- **Cromwell High School** / $1,000 / for a scholarship awarded to Dillon Coleman. Art and Edythe Director Family Scholarship Fund.

- **Middletown Public Schools** / $5,000 / to support the after-school strings program. Elizabeth Swaim Arts Enrichment Fund.

- **Middletown Public Schools Cultural Council** / $5,000 / for the Middletown High School trip to the Bushnell Theater. Elizabeth Swaim Arts Enrichment Fund.

- **East Haddam Public Schools – Nathan Hale-Ray High School** / $1,495 / for the Heather Lind Ashworth Memorial Scholarship awarded to Sarah Powell.

- **Tri-Town Youth Services** / $563 / Tri-Town Youth Services Fund.

- **YMCA of Northern Middlesex County** / $42,696.70 / for capital acquisition and replacement equipment purposes for the Ingersoll Outdoor Center. Ingersoll Outdoor Center Fund.

**Designated Grants Total $55,754.70**

**2009 DONOR ADVISED GRANTS (ENDEOURED AND NON-ENDEOURED FUND)**

From the following funds: John and Jean Beckert Fund, Hugh L. and Judith R. Cox Fund, Nancy Fischbach and Martin Wolman Fund, Carolyn Greenleaf Fund, Griffin Family Fund, J. Guy Lombardo Fund, Howard and Yvonne McAuliffe Fund, MiddleOak Family Assistance Fund, The Newberg Family Fund, Ryan’s Circle of Giving Fund and anonymous donors.

- A Better Choice Women’s Center / $500 /  
- Atlantic Classical Orchestra / $5,000 /  
- Children’s Home of Cromwell / $500 /  
- Community Music School / $552.50 /  
- Connecticut Library Consortium / $10,000 /  
- Cystic Fibrosis Foundation / $4,389.63 /  
- Durham Fair Foundation / $2,000 /  
- Kingswood-Oxford School / $4,389.62 /  
- Middlefield Federated Church / $1,200 /  
- Middlesex Community College Foundation / $1,600 /  
- Middlesex Hospital / $3,500 /  
- Salvation Army of Middletown / $500 /  
- St. Vincent DePaul Place / $16,729.70 /  
- Town of Deep River / $500 /  
- Trinity College / $4,389.62 /  
- University of New Haven / $5,000 /  
- Yale Cancer Center / $4,389.63 /  

**Donor Advised Grants Total $65,140.70**

**Willard McRae Community Diversity Award**

Director Emeritus Willard McRae received the Liberty Bank (renamed the Willard McRae) Community Diversity Award

**Russell Library Director Art Meyers announces the opening of the Cooperative Collection, a partnering project with MCCF and Liberty Bank Foundation**

**National trainer Chuck Loring works with Middlesex County nonprofit organizations**
PARTNERING FOR GREATER IMPACT

The Community Foundation works with many donors to build resources for today -- and the future. Our grant making partners utilize the Community Foundation’s knowledge of the needs in Middlesex County and the grant making expertise of staff and Grants Committee volunteers. Together we increase our granting capabilities, and thus provide greater impact for the quality of life in Middlesex County. We are grateful for the support and generosity of our philanthropic partners and their contributions to grant making within our communities.

CONNECTICUT HUMANITIES COUNCIL provides consultation to improve heritage grant making through the Community Foundation. They also continue to support our grant making efforts, providing $9,025 to our competitive grant making funds for organizations in Middlesex County. This innovative grant making collaboration with a Community Foundation was the first in Connecticut and serves as a statewide model.

RIVER VIEW CEMETERY established a fund in 2001 to provide funds for unrestricted grant making. They increase their funding efforts by providing $40,000 for grants, supporting the arts, culture, education and human service organizations serving the lower Connecticut River Valley. Their continued commitment to the mission of the Community Foundation and the quality of life in Middlesex County underscores the broad impact partnerships can have in our communities.

THE ANN T. D’ADDARIO FAMILY FOUNDATION generously provided $10,000 in unrestricted funds for grant making, proving PHILANTHROPY MATTERS AND PHILANTHROPY WORKS in our community.

CITIZENS BANK continued its support of the Community Foundation’s dedication to our nonprofit organizations by providing $5,000 for the Nonprofit Resource Center, providing free and low-cost training for staff and volunteers.

TYPES OF FUNDS

Anyone can be a Philanthropist. There are many ways to give to the community in which we live, work, and play. Donors who wish to establish their own fund at the Community Foundation may choose one or a combination of funds to meet their charitable interests. All funds may be added to by anyone and may be built over time.

ENDOWED FUNDS

UNRESTRICTED FUNDS
Contributors who wish their donations to have the broadest perpetual impact in improving the quality of life in our community provide planned or direct gifts for the Foundation’s unrestricted endowment. These funds provide the most flexibility to the Board of Directors in making grants to address the concerns of the day. Named Funds may be established with a $5,000 gift.

RESTRICTED FUNDS: Field of Interest Funds
Field of Interest Funds support a specific purpose, geographic area or charitable goal. Gifts to these funds specify broad areas such as the arts, education, the environment, health care or services to a specific town or region. Named Funds can be established with a donation of $20,000 or more.

DESIGNATED AND DONOR ADVISED FUNDS
Specified charitable organizations receive income from Designated Funds. Named advisors make recommendations for grants from Donor Advised Funds. Both types have $20,000 minimums.

ORGANIZATIONAL FUNDS
An organization, wishing to take advantage of the Community Foundation’s investment and/or grant making expertise, may establish an Organizational Fund by transferring part or all of its endowment to be held and managed by the Community Foundation. The income from Organizational Funds may help increase their endowed fund or be paid annually as a grant to the organization.

UNENDOWED FUNDS
Unendowed Donor Advised Funds may be established to provide tax advantages in one or more years while donors decide where their charitable contributions will best meet their giving objectives. The principle of these funds may be distributed. Community Foundation staff provides information to help donors, if they wish. Donor Advised Fund distribution recommendations must be approved by the Board of Directors to maintain IRS compliance for the tax advantages received when making gifts. Income earned by these Funds helps support Community Foundation operations.
The Community Foundation’s mission of improving the quality of life in Middlesex County along with its sound stewardship practices attracted donors to establish fourteen (14) new Funds with major impact for the future. The donors of these Funds have a vision for improving their community. The Community Foundation provides the vehicle for transforming their vision into tangible results now and forever.

**Shoreline Landmark Establishes New Fund at MCCF**

Bill’s Seafood Restaurant is a landmark on the Connecticut shoreline. Thousands of area residents and visitors visit annually to experience the on-the-water setting to the “tune” of Westbrook’s “singing bridge”.

The local (and visiting) residents have long supported Bill’s. Their loyalty is returned by the owners and staff many times over. For the past six years, Bill’s Seafood has hosted a golf tournament to support scholar-athletes from the shoreline towns. In just six short years, the business has awarded over $98,000 in scholarships. In 2009 alone, a total of $18,000 was presented to eight students, a male and female senior for the towns of Westbrook, Clinton, Old Saybrook and Valley Regional High School (Chester, Deep River and Essex). The students are selected by an independent committee of volunteers and have achieved high academic distinction, participated in a sport, demonstrated a positive character, strong leadership qualities and were active in community services. They all plan to further their education in a four-year college, junior college, business or vocational school.

This year the committee set its sights on doing more. They realized that the rising cost of higher education was preventing many deserving students from continuing their education, something they felt was unacceptable. They wanted to make it possible for more to pursue their educational goals. These dedicated volunteers faced the challenge of how to focus on running the golf tournament, and raising more funds. They also knew that they did not want to establish and run a nonprofit…they just wanted to give back more to the communities where they work, live and call home.

The committee worked with the Community Foundation to establish the Bill’s Seafood Golf Tournament Athletic Scholarship Fund. The committee will be able to focus on giving back and nourishing the educational aspirations of more shoreline scholar-athletes as it utilizes the Community Foundation’s sound structure and expertise in managing funds. Mark Leopoldino of Bill’s Seafood states “the partnership with the Community Foundation is a perfect solution for our generous committee. We are grateful for the guidance and expertise of the Community Foundation. We get to do what we love best: running the golf tournament and giving back to the community that means so much to us.”

**The Children’s Fund**

Betsy Morgan and Jane S. McMillan, epitomize the word “caring”. They are legendary in their passion to help the children in our county, their boundless enthusiasm and energy, and their hearts as big as Middlesex County. Betsy and Jane established The Children’s Fund with the mission to improve the lives of children (years 0 to 18) in Middletown and Middlesex County. They strongly believe that we all have an obligation to help our young people and hope that The Children’s Fund will encourage others to secure a brighter future for children in our region.

**The Connecticut Yankee Land Conservation Fund**

The Connecticut River and its surrounds are extraordinary natural resources of regional significance. They set Middlesex County apart from not only the rest of the state, but, indeed, the rest of the country. Bordered by the Salmon River to the east and the mighty Connecticut River to the southwest, the Connecticut Yankee (CY) property provides a unique and spectacular opportunity to conserve a site of historic and environmental proportions.

Once the site of a recently decommissioned and dismantled nuclear power plant that occupied 30 acres along the Connecticut River, this property now represents a rare opportunity to conserve a beautiful place for public benefit. The CY Land Conservation Project was created with just this objective – to protect and provide access to this spectacular setting.

A group of local conservationists is working to achieve its goal that the land remain undeveloped. The five-person Advisory Committee, along with a skilled conservationist, is building a coalition of support...
from the conservation and nonprofit communities, local residents, and government agencies on the local, state and federal levels.

The group wanted to focus its efforts on working with Connecticut Yankee and others to negotiate the best use of the property for the owner and for Middlesex County stakeholders. They approached the Community Foundation to serve as its fiscal agent so they could put their passion to preserve to the best and most effective use of their precious time. The Community Foundation provides the backroom support for the Connecticut Yankee Land Conservation Project which enables the Advisory Committee to leverage its expertise and focus on the preservation of this incredible natural resource.

The Advisory Committee consists of Stanford Brainerd, James McHutchison, Eric Knapp, Raul de Brigard, Shelley Green, and Melissa Spear, consultant.

**Council of Business Partners Fund**

**CREATING PARTNERSHIPS THROUGH DEDICATION AND LEADERSHIP**

A dedicated group of local business leaders wanted to give back to the community that has supported them over the years. Working with the Community Foundation, they created the Council of Business Partners (CBP) Fund. The group set out to research ways it could specifically impact the community’s youth. This research led to their first project, the “No Bully Zone” initiative, using the knowledge of the Rushford Center in the Fall of 2009.

Bullying in schools has become a serious and widespread problem and the group felt that an anti-bullying campaign could impact the area’s youth in a meaningful way. The collaboration between the Rushford Center and the CBP leveraged the Council’s financial resources and business contacts with Rushford’s expertise. The result is a program that utilizes peer leaders to educate other students and work with the school community to develop a safe learning environment for everyone.

The MCCF Council of Business Partners are Colin Burr, McCutcheon Burr & Sons; David Director, Connecticut Lighting Centers; Dave Gilbert, Direct Energy; Marc Levin, Malloves Jewelers; James Mahoney, Mahoney Sabol & Co.; Arlene Mazzotta, A. R. Mazzotta Employment Specialists; William McCann, Susan McCann and Shawn McCann, Best Cleaners; Laura Pedersen, A. R. Mazzotta Employment Specialists; David Preston, MCCF Board Member; Nancy Racza; Ted Rossi, The Rossi Group, LLC; David Royston, MCCF Board Chair; David Shulman, Suburban Stationers; John Sullivan, A&A Office Systems; Dan Zimmerman, dlz associates; St. Mary’s Church of Portland and Congregation Adath Israel in Middletown of the Interfaith Golf Open Tournament.

**Nancy Fischbach and Martin Wolman Fund**

Where we work. Where we live. Where we play. Every donor and every organization has a tremendous impact in sustaining our quality of life. Nancy Fischbach and Martin Wolman of Deep River live local and give local. They believe in supporting the organizations which have a direct and significant impact on the community in which they reside. Nancy and Martin support the Community Foundation in so many ways, and in 2009 they added a Named Fund to that list of ways. This fund will continue giving to the community which means so much to them.

“We want to do our Middlesex County giving through a Middlesex County organization. What better vehicle than the Community Foundation whose mission is to improve the quality of life for the people of Middlesex County now and in the future.”

**Griffin Family Fund**

Supporting the Community Foundation can take many forms. The Griffin Family of Durham has found countless ways to support Middlesex County Community Foundation, including being our cheerleaders and promoting the work MCCF does throughout the County. To that end, they created The Griffin Family Fund, a Donor Advised Fund, to support the many programs and partnerships in which MCCF is involved.
The Griffins will tell you that they made a conscious decision to make donations during their lifetime, rather than through a single bequest. They strongly believe it is necessary to experience the joy of supporting worthwhile endeavors and organizations, and then stepping back to watch them grow and develop.

“The joy you get from that “Giving Back” is overwhelming. It adds so much to our lives, as well as to the programs.” Sharon Griffin

The Griffins had yet another purpose in mind: the importance of teaching the next generation the benefits and joys of philanthropy. Hence the name of the Fund: The Griffin Family Fund. The Griffins state that in exposing their children to giving back and encouraging them to participate in the philanthropic decisions, the next generation of Griffins will be invested in the community in which they live, work and play. They truly will actively care and share their parent’s belief that “PHILANTHROPY WORKS”.

LASTING MEMORIES – LASTING IMPACT

Ida was, according to everyone who knew her, incredible. Her roots were here in Middlesex County, and she instilled that love in her family. Ida also did much more. Ida demonstrated that one person can, indeed, make a difference. She believed that living local and giving back to your roots can – and will – make a difference.

Ida played a leading role in the local 1960 Kennedy for President Campaign, and she was an early and active supporter of the civil rights movement. She instilled a strong sense of commitment to others and equality to all in her family.

To that end, her son, Mark, and his family established two funds in her honor and loving memory, the Ida M. Masselli Fund, a donor advised endowed fund and Ida M. Masselli NAACP Scholarship Fund which will support NAACP-Middlesex County Chapter

DEBORAH T. MEHR
Dedicated to Others – In So Many Ways

Those who knew Debbie marvel at her dedication to her family, friends and students at Wesley School in Middletown. They say things such as “what a caring, warm, nice, decent human being” she was. They remember her passion for books and reading and how she passed that love of reading on not only to her daughters, Alison and Amanda, but also to her third grade students. She bought thousands and thousands of books for her students! It’s no wonder that Wesley School dedicated a corner of the library to her.

Debbie always wanted to teach. It was in her DNA. After raising her two daughters, she went back to school to make that dream a reality. Her commitment to her students and their well-being is legendary, as evidenced by the number of former students who visited her regularly throughout her illness.

Her family wanted Debbie’s good works to be carried on through the Community Foundation and established the Mehr Family Fund in her honor. Her husband, Jonathan, stated that “the family sincerely hopes that the goodness we got from Debbie will continue year after year through this Fund”.

Truly an example of “GOOD PEOPLE DOING GREAT THINGS”.

MiddleOak Family Assistance Fund

MiddleOak stands out as a great corporate citizen. The company and its employees are active in volunteering and in helping out in a multitude of ways throughout the county. Company leaders came to the Community Foundation to see how they could actively engage their employees in doing “just a little bit more”. They were spurred into action by some of their own staff who wanted to assist fellow employees in their times of need.

The Family Assistance Fund was established for two simple reasons: to give back to others and to lend a helping hand. The staff and management of MiddleOak certainly put their hearts into action and their funds to work and truly are GOOD PEOPLE DOING GREAT THINGS!
A Lasting Memory for a Wonderful Friend, Teacher and Mentor  
Karen A. Nelson Memorial Fund

Members of the Middlesex-New London Chapter of Connecticut State Music Teachers Association have created a fund in Memory of Karen A. Nelson at the Community Foundation.

Karen was a gifted pianist and dedicated and inspiring teacher and was tragically killed in an automobile accident in 2009. Her expertise in performance, teaching and adjudicating were well established throughout Connecticut and beyond. Karen held degrees in Piano Performance from the Cleveland Institute of Music and Yale School of Music. She continued her studies with Paul Baumgartner in Switzerland, with Leon Fleischer, and with Konrad Wolff. At the time of her death she was teaching students of all ages at her Westbrook studio, Brown University in Providence, and Choate Rosemary Hall in Wallingford.

In Appreciation of Volunteers

Volunteers do so much for so many and are the life blood of Middlesex County’s nonprofit and service organizations. The extraordinary commitment they display toward various causes and programs is inspiring and their enthusiasm for helping others spreads throughout our region as they share their time and talent.

The NEWBERG FAMILY FUND has been established by Esther Newberg to “Encourage Volunteerism at Middlesex Hospital in honor of Marion, Maurice and Ivon Newberg”. The Fund was started to highlight the extraordinary work of her mother, Marion, and her longtime dedication to the hospital. It is Esther’s hope that Marion’s countless volunteer hours and wonderful work at the hospital will inspire others to give back….and gain untold rewards in doing so.

“Volunteers are a vital component of what we do and are critical to the hospital’s infrastructure”, stated Vin Capece, President and CEO of Middlesex Health System. “This Fund will help us support volunteerism and the many programs currently in place. It will also assist us in expanding our efforts to recruit and retain this valuable piece of our organization.”

“Volunteers are so important and an incredible asset to the hospital. The fact that this Fund even exists is, in and of itself, a credit to their selfless efforts on behalf of others,” said Kate Kearns, Volunteers Services, Middlesex Hospital. “We are grateful to Esther Newberg and the entire Newberg Family for their generosity.”

Family Ties Bring “The Big Easy” to Middlesex County

Dr. Gerald and Judy Cohen reside in New Orleans. They live, breathe and love the excitement of “The Big Easy”. Yet, when their son moved to Middletown in 2001, they found another city to embrace. They developed a deep love and appreciation for Middletown, its neighborhoods and its diversity.

The Cohens are community-minded people who understand the value of giving back and investing locally. They are impressed with the work of the North End Action Team (N.E.A.T.) and its members and marvel at the important work which enriches the lives of the people who live in the North End – and NEAT carries out its efforts twenty-four hours a day, seven days a week.

The Cohens established the Live Local Give Local – N.E.A.T. Fund at the Community Foundation to ensure that the work of N.E.A.T. and its members continues and thrives – now and forever.

A Quiet Way – A “Strong” Impact

Herb Patterson Memorial Fund

A long-time resident of Durham, Herb Patterson was a kind, quiet man who made a deep, lasting impression on everyone he met. Herb attended Bowdoin College and then joined the Navy, reaching the rank of Captain of a PT boat during World War II.

Herb was known as a life-long philanthropist, volunteering throughout the community, serving on the Board of Directors at Middlesex Hospital and as Chairman of the Board at Durham Manufacturing, and actively supporting his church.

In honor of Herb’s devotion to his community and his determination to support the many organizations working within the county, Ellen Patterson, Herb’s wife, created the Herb Patterson Memorial Fund with the Community Foundation. Donations made to this fund will be used to help improve the quality of life in Middlesex County, particularly in Durham and Middlefield, towns he dearly loved.
PREVIOUSLY ESTABLISHED FUNDS (DATE ESTABLISHED)

UNRESTRICTED ENDOWED FUNDS

MIDDLESEX ENHANCEMENT FUND (1997)
This Fund is available for all donors to make gifts of any size. Over the years, the Fund has grown substantially with memorial, anonymous and other gifts. This fund supports grants to meet current needs and improve conditions of the county.

JOHN A. BARR, JR. FUND (1999)
A memorial Fund in honor of founding Foundation board member and former Essex Savings Bank president, John Barr. Annual gifts from Essex Savings Bank have helped this Fund increase its impact.

BEE AND MISSIONARY SOCIETY OF FIRST CONGREGATIONAL CHURCH OF MIDDLERTOWN FUND (2003)
Established in 2005 to continue their 175 years of support to organizations and worthy causes in the community.

THE COUCH FAMILY FUND (1998)
Established by former board member Rev. A. Edward Couch in honor of his parents.

EDMUND T. DELANEY FUND (2001)
Established in memory to support the community he loved by his wife, Barbara.

LEE AND WELLES GUILMARTIN FUND (2002)
Established in 2002, and built over time, to meet the needs and improve the quality of life in our community.

PETER AND EILEEN HARDING FAMILY FUND (2002)
Recognizing the many and changing needs of the people in Middlesex County, the Hardings established this Fund to provide community support now and in the future.

KALAYJIAN FAMILY FUND (2004)
Established in 2004 by Marcia and David Kalayjian to provide lasting benefit to the community to which they are devoted.

J. GUY LOMBARDO FUND (2000)
A memorial Fund established by Joe Lombardo in memory of his son Guy.

SONYA AND JEFF MADOFF FUND (2004)
Established to support changing needs in a community they love.

WILLIAM MCCANN/BEST CLEANERS FUND (2000)
A memorial Fund established by Esther McCann in appreciation of our community.

MIDDLEOAK SPECIALTY FUND (1999)
Established by the company to support the community of its home office.

PCI MEDICAL FUND (2002)
Established by Philip and Clio Coles to give back to their community now and in the future.

PRESTON FAMILY FUND (2004)
Established by Barbara and David Preston to build the endowment and provide lasting benefit to the community.

RIVER VIEW CEMETERY FUND (2001)
Established by the Essex-based cemetery to benefit the entire community.

Established by the Russells to begin their charitable giving plan.

SAUNDERS FAMILY FUND (2005)
Board member Anita Ford Saunders is building an unrestricted fund over time to benefit the community’s changing needs.

JEAN AND BIFF SHAW FUND (1998)
Established by the Shaws to repay their community for the benefits they have derived from it.

PATTI ANNE VASSIA FUND (2001)
Established to address changing community needs and to receive future planned gifts.

SUSAN B. AND WILLIAM K. WASCH FUND (1999)
Set up by the Wasches to coordinate their giving now and in the future to the community they love.

JAN ELLEN YOUNGBLOOD FUND (2004)
Established in 2005 to provide unrestricted support for our community now and forever.

FIELD OF INTEREST ENDOWED FUNDS

This Fund supports local nonprofit organizations that care and shelter animals, provide training for animals and their human companions, and educate and aid in the prevention of cruelty.

ANONYMOUS FUND (2002)
Support of Middlesex County botanical beautification and enhancement of the environment through horticulture and forestry.

THE ARTS FUND (1999)
Established by Derry D’Oench, founding board member, and supported by many donors to promote arts of all kinds countywide.

SHERRY AND HERB CLARK FAMILY FUND (1998)
Provides benefit to the people and communities of the Valley Shore area.

HOWARD AND YVONNE MCAULIFFE FUND (2002)
Supports basic human needs and programs for the less fortunate.

KIRKPATRICK FAMILY FUND (2002)
Supports arts organizations and initiatives with priority to Middletown organizations to strengthen infrastructure and/or to support public presentations, on a competitive basis using excellence as the standard.

LOFFREDO PERFORMING ARTS FUND (2006)
Established by Connecticut Heritage Productions in memory of Dr. Louis and Eva Loffredo to benefit arts organizations serving Middletown, East Hampton and/or Portland on a competitive basis as determined by the Foundation’s Grants Committee.

KATHERINE AND WILLARD MCMURRAY FUND (2001)
Supports education programs in Middletown.

MIDDLEOAK SPECIALTY FUND (1999)
Promotes safer communities with priority to motor vehicle, marine and personal safety.

ANN AND GEORGE PETRY FUND (2001)
Supports local arts programs and activities, established by their daughter Liz.

POMPEA FAMILY/PRIMARY STEEL FUND (1999)
Provides support for education and future manufacturing workforce development.

FUND FOR PRESERVATION AND STEWARDSHIP OF NATURAL AREAS (2005)
Richard H. and Esther B. Goodwin established this Fund to support the preservation and stewardship of the Burnham Brook Preserve in East Haddam.

ELIZABETH SWAIM MIDDLETOWN FUND (2000)
A generous bequest started this Fund to benefit the people and the city of Middletown.

RACHEL AND CHUCK WITTSIE FUND (2001)
Supports basic human needs and programs for the less fortunate.

FUND FOR WOMEN & GIRLS (2002)
Established by Founding Donors and many others to empower women and girls to be self-reliant and reach their potential.

BEE AND MISSIONARY SOCIETY FUND FOR WOMEN & GIRLS (2003)
Provides support for the Fund for Women & Girls Committee to make grants as previously described.

MARY KLAAREN FUND FOR WOMEN & GIRLS (2007)
Lee Guilmartin established this Fund to honor the many contributions and service to others provided by the Reverend Mary Klaaren. The Fund will support grants to empower women and girls to be self-sufficient and reach their potential.

DESIGNATED AND DONOR ADVISED FUNDS

ASHWORTH FAMILY SCHOLARSHIP FUND (2005)
Established in memory of Heather Lind Ashworth, a long time librarian at Hale-Ray High School, for East Haddam graduating students. The Fund will grow with future planned gifts.

CHARLES MUNSON BURR, JR. FAMILY FUND (1999)
Harry Eben Burr is building this Fund over time to honor his father with scholarships for disadvantaged Wesleyan students.
CAMP HAZEN YMCA FUND (2007)
Camp Hazen YMCA partnered with the Community Foundation to ensure that its vital programs will be offered long into the future for the benefit of our young people.

GILEAD COMMUNITY SERVICES FUND (2003)
Ensures future funding diversity for this behavioral health organization and encourages staff and board members to give to this endowed fund to maximize a challenge match donation.

MIDDLESEX UNITED WAY FUND (2001)
The Foundation’s first Agency Endowment Fund was established with donor-restricted endowment gifts as an example to all nonprofits.

ODDFELLOWS PLAYHOUSE ENDOWMENT FUND (2006)
Established to help support the Community Foundation and diversify the investment of their small and growing endowment.

WEITZMAN-VANCE COMMUNITY HEALTH CENTER FUND (2003)
The Community Health Center saw the value of supporting the Community Foundation and growing its endowment for the future benefit of the individuals it serves. The Fund is named for two exceptional volunteers, David Vance and the late Jerry Weitzman.

UNENDED FUNDs

JOHN AND JEAN BECKERT UNENDED DONOR ADVISED FUND (2007)
John and Jean Beckert set up this Donor Advised Fund to make their charitable gifts to worthy causes and their favorite charities.

Hugh and Judy annually support their favorite charities and worthy causes of their choice from this Fund.

COX FAMILY FUND FOR MIDDLESEX COMMUNITY COLLEGE (2006)
Established by Hugh and Judy Cox for the Community College to give students a competitive edge in their future careers.

INGERSOLL OUTDOOR CENTER FUND (2007)
The Community Foundation manages this special Fund which was established in honor of Loretta Ingersoll. The Fund makes annual distributions for capital improvements for the Northern Middlesex YMCA’s Ingersoll Outdoor Center.

JACQUELINE HUBBARD & NORMAN NEEDLEMAN HONORARY FUND FOR THE IVORYTON PLAYHOUSE FOUNDATION (2007)
Sherry and Herb Clark established this Fund to honor Jacqueline Hubbard and Norman Needleman for their efforts to ensure that Ivoryton Playhouse serves as a place for the community to meet and enjoy good theater for years to come.

HOWARD AND YVONNE MCAULIFFE FUND (2000)
The McAuliffes use this Fund to make contributions to local programs that help the less fortunate and are consistent with their values and beliefs. They often seek staff assistance to learn where needs are the greatest to maximize the impact of their charitable giving.

PRESIDENT’S DISCRETIONARY FUND (2008)
Philanthropy matters. Philanthropy works. Philanthropy does not have a set schedule. There are times when emergencies arise and immediate action is required. This Fund allows for immediate responses to unforeseen situations and to assist nonprofits when they need it most.

RYAN’S CIRCLE OF GIVING (2008)
A giving circle in memory of Ryan Gordon; this Fund was established to support those organizations Ryan believed helped him throughout his life; to enable future generations to have the benefit of a good education; and to inspire others to give.

SALVA FAMILY FUND (2007)
Bethanne and Gary Salva established this Fund in honor of their marriage and to inspire others to give back to the community.

KENT S. WARNER MEMORIAL FUND (2002)
Established by Scotty King, the Fund is named for the father of her children. Grants support local programs that maintain and support healthy families and international development efforts.
Planned Gifts Secure Our Future

Seven thoughtful donors have notified the Foundation of adding the Community Foundation to their estate plans this year. These future gifts are estimated at more than $1 million. This brings our total known planned gifts to over $13.3 million from 59 individuals.

Anonymous (9)
Jeanette Archer-Simon and Robert E. Simon
Ronald S. Ashworth
Bonnie Bennet
Marcia W. Bromberg
Harry Eben Burr
Tim Cahill
Jean H. Caron
Richard Caron
Sherry and Herb Clark
Barbara S. Delaney
Ellen G. D’Oench *
Russell G. D’Oench, Jr. *
Ralph and Gail Gometz #
Esther and Richard * Goodwin
Beatrice Casey Holt #
Elizabeth Horn
Marcia and David Kalayjian
Robert L. Kirkpatrick, Jr.
Gayle Kranz
Lisa and Lamar LeMante #
Sonya and Jeff Madoff
Arlene R. Mazzotta
Edward L. McMillan
Jane Stokes McMillan
Deborah L. Moore #
Liz Petry
Barbara and David Preston
Jean M. Richards #
Sari and Howard Rosenbaum
Jean and Biff Shaw
Irene E. Silberstein
Thomas H. Stickney and David Westfall
Elizabeth Swaim *
Patti Anne Vassia
Susan and William Wasch
Charles and Rachel Wiltzie
Jan Youngblood
Joan S. Youngs

* New or additions in 2009
# Bequest received/announced

2009 Investments and Performance

Foundation investments are determined and monitored by the Finance & Investment Committee to meet the Board of Director’s approved Investment Policy. Monies are invested in several of the Vanguard family of mutual funds, with cash holdings in money market accounts.

2009 and 2008 Audits were performed by Mahoney Sabo & Company, LLP; copies are available upon request.
Sustainers are Major Donors Who Have Generously Supported the Community Foundation Over Time

**Sustainers**

- Aetna Foundation, Inc.
- Citizens Bank / Citizens Bank Foundation
- Sharon and Herbert T. Clark III
- Clark Group
- E.S.T. Trust
- Essex Savings Bank / Essex Financial Services
- The Kitchings Family
- Liberty Bank / Liberty Bank Foundation
- MiddleOak Specialty
- Middlesex Hospital
- Pratt & Whitney
- David & Barbara Preston
- George W. Whelen IV/Whelen Engineering, Inc.

**Chairman’s Circle Members (Gifts of $2,500 or More for Operations)**

- Aetna Foundation, Inc.
- William and Helen Chatman
- Citizens Bank
- Clark Group
- Sharon and Herbert T. Clark III
- Cynthia and Randy Clegg
- DEMCO, LLC
- The Director Family /
  - Connecticut Lighting Centers, Inc.
- Nancy Fischbach and Martin Wolman
- Sharon and William Griffin
- Harding Development Group
- Interfaith Open Golf Tournament
- Joyce and Robert L. Kirkpatrick, Jr.
- The Kitchings Family
- George and Sally Mayer
- MiddleOak Specialty
- Deborah and Roy Moore
- Jacqueline Hubbard & Norm Needleman
- James and Lynn O’Halloran
- Ellen Patterson
- Pratt & Whitney
- David and Barbara Preston
- Mark and Deborah Richards
- David and Eunice Royster
- Raymond and Judith Schoonmaker
- Tower Laboratories Ltd.
- George W. Whelen IV

**President Society Members (Gifts of $1,000 or More for Operations)**

- Janice and Tip Atkeson
- Susan Barrett
- Bonnie and John Bennet
- Bidwell Industrial Group, Inc.
- Vin and Tina Capece
- CT Light & Power
- CT Yankee Realty, Inc.
- Hugh and Judy Cox
- Ellen G. D’Oench
- Woodbridge and Nancy D’Oench
- Durham Manufacturing
- Essex Savings Bank
- George C. Field Company
- Richard and Barbara Gibbons
- Guilford Savings Bank
- Lee and Welles Guilmartin
- Jane and Gregory Harris
- Robert F. Herbst
- John R. Jakobson
- Mary and Douglas Jones
- Scotty King and Robert Graulich
- Liberty Bank Foundation
- Athena and Joseph G. Lombardo
- Edward and Jane McMillan
- Katherine and Willard M. McRae
- David Miner and Penny Robiner
- Andrew and Gail Morris
- Thomas and Susan Pastorello
- PCI medical, Inc.
- Laura M. Pedersen
- Jean M. Richards
- Gary and Beth Salva
- Les and Anita Ford Saunders
- Jean and Ralph H. Shaw II
- Richard and Joan Tomc
- Patti Anne Vassia
- William and Susan Wasch
- Rachel M. Wiltse

**Dedicated Friends**

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- Becky and Martin Anderson
- Anonymous (3)
- James and Marian Bairstow
- Elaine and Stephen Bank
- Jennifer D. Barry
- John Biddiscome and Gail Gorton
- Sharon K. Birmingham
- Robert and Sallie Boody
- Kathryni I. Briggly
- Marcia W. Bromberg
- Marilyn and Richard Buel
- Eleanor and Robert Champion
- Patricia C. Christian
- Susan and Fred Cohan
- Loma M. Corcoran
- Jule A. Crawford
- Thomas and Sally Crawford
- Ann duCille
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- Jonathan W. Field, Esq.
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- Kathleen H. Flood
- Peter and Laurie Frenzel
- Barry J. Fulford
- Susan and Michael Geentty
- John and Lisa Gibson
- Gibson Design, LLC
- Susan and Giulio Giuffrida
- Phyllis and Paul Greenberg
- Dora and William Grover
- John and Judith Heiser
- Etzii S. Heyl
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- Tony Horwitz
- Anne and Campbell Hudson
- Keiko Kaiser
- Thomas and Heather Kannam
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- Howard and Sari Rosenbaum
- William and Diane Russell
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- Frank and Lynn Sauter
- Stephen Schwartz
- Sarah H. Shapiro and Rohan D. Manning
- Irene and Allen B. Silverstein
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- Nancy R. Smith
- Terry Smith
- Donna and C. William Stamm
- Clifford O. Straub
- Jennifer Tate
- Muriel W. Test
- Domenique S. Thornton
- Elizabeth V. Tishler
- Ursell’s Web
- Barbara-Jan Wilson
- Mr. and Mrs. William Winterer
- Sally V. Davage Wright
- Young’s Printing
- Joan S. Youngs
### Endowment Donors

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<td>Jonathan Best and Peggy Carey</td>
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<td>Julie S. Flagg, M.D.</td>
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### Fund for Women & Girls Donors

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### Elizabeth Swaim Arts Enrichment Fund Donors

<table>
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<tr>
<th>Norman J. Abbott</th>
<th>Patricia and Jerome Long</th>
<th>Emilie G. Ratner</th>
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<td>Deborah Y. Beers-Jones</td>
<td>Katherine S. Lukens</td>
<td>Abner E. Shimony and Manana Sikic</td>
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<td>Jocelyn A. Camp</td>
<td>Ellen and Lewis Lukens</td>
<td>Jeffrey G. Stirling</td>
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<td>Mel Ellis</td>
<td>Jane Stokes McMillan</td>
<td>Kathleen M. Swaim</td>
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<td>Susan D. Forte</td>
<td>Lee T. McQuillan</td>
<td>Andrew Szegedy-Mszak and</td>
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<td>Susanne Javorski and Bruce MacLeod</td>
<td>Christopher Montgomery</td>
<td>Elizabeth Bobrick</td>
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<td>Joan T. Jurale</td>
<td>William and Emmy Morrison</td>
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<td>Fay Levine</td>
<td>Marian Ramble and Alan Cohen</td>
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**Gifts for Women & Girls Grantmaking**

Susan E. Abbe
Altrusa Club of Middletown, Inc.
Anonymous (4)
Janice Augeri
Shirley M. Barrett
Sharon K. Birmingham
Sallie P. Boody
Betsy White Booz
Jessica Carso
Barbara B. Clark
Joyce R. Conklin
CT Medical Insurance Company
Barbara S. Delaney
Virginia E. Dickson
Susie Dutcher
Barbara Edwards
Ann and Carl Faust
Kathleen Flood
Laurie Frenzel
Lynn K. Giroux
Donna S. Goodman
Estelle Goodman
Dorothea E. Hast
Linda Juliani
Hortie Kabel
Dorothy Kaplan
Marian Katz
Joan A. Kowak
Frank Kuan
Jaimee Kulig
Mary Ann Lambert
Ellen B. LaPointe
Audrey Livingston
Patricia Long
Joanne A. Lappi
Ann H. McCann
Joan W. Miller
Diane C. Moore
Sheila and Russ Murphy
Joanne Nesti
Maureen O'Connell
Barbara Paola
Carol Parmelee-Blancato
Ernest D. Reamer, D.M.D.

**Bill’s Seafood Golf Tournament Athletic Scholarship Fund Donors**

AAA Rent-A-Car, Inc.
Aiudi Concrete, Inc.
Allan S. Goodman, Inc.
Ashley’s Ice Cream
B & L Construction, Inc.
Bill’s Seafood Restaurant
William J. Britt
Chester Veterinary Clinic, P.C.
Christopher J. Hallahan, Inc.
The Clinton Floor Store, LLC
Clinton Paint and Decoratings, LLC
Coastline Construction Corp.
CT Veterinary Center, Inc.
Winifred C. Curry
CWPM
East Coast Trailers, LLC
Environetech Septic Services, LLC
Gull Associates, Inc.
Donald W. Gustafson
Ipswich Maritime Products Co., Inc.
Kappa Sails, L.L.C.
Landon Lumber Company
The Lee Company
The Log Cabin
Marklyn Site Contractors, Inc.
Mason & Di Marco, P.C.
Mark F. Morin
Michael E. Niedermeyer
Lisa C. Palumbo
Perfection Plumbing Services, LLC
Quality Propane, Inc.
Rhodes Pump Services, LLC
The Russell Hall Company, Inc.
S.D. Hallahan Housewright, Inc.
Saybrook Family Dental Care, LLC
Sound Petroleum II, Inc.
Stonington Seafood Harvesters, Inc.
Emmett J. Sullivan, Sr.
Thurston Foods, Inc.
TNJ Enterprises, Inc.
UBS Financial Services, Inc.
Universal Telecommunication Systems, Inc.
Westbrook Auto Sales & Services
Westbrook Concrete Block Co., Inc.
Wicox Fuel, Inc.

**Connecticut Yankee Land Conservation Fund Donors**

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Stanford H. Brainerd
Charleen Breen
Eileen Brooks
Katharine T. S. Coley
CT River Gateway Commission
William Cuddy
Patrick and Terry Danaher
Barbara O. David
Marjorie W. Dehnd
Raul de Brigard
Susan T. Dowling
East Haddam Land Trust
Howard B. Foltz
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John F. Herbst
Robert Johnson
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Henry D. Lord
Diane Mack
Anna Ruth S. Masters
James McHutchison
Emily N. Moore and Jerry Graham
Ronald L. Niles
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Leslie Starr
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Joan A. Stone
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Andrea Tolomea
Richard P. Tolomea
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David L. Wagner
Stuart Winquist
Dr. and Mrs. Robert Zavad

**ARF! Animals: Respect and Friendship Fund**

Cynthia H. and Randall Clegg
Marcia and David Kalayjian
Janice R. Kalkreuth
The Kitchings Family
Laura Kitchings
### Karen Nelson Memorial Fund Donors

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<td>Roy E. Ogren</td>
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<td>Joyce C. Baxter</td>
<td>James and Hedy Korst</td>
<td>Marilyn R. Regan</td>
<td>Mary L. Broughton</td>
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<td>Harriet V. Lattanzi</td>
<td>Eugenie R. Rocherolle</td>
<td>Jane Bugbee</td>
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<td>Mary L. Broughton</td>
<td>Lori Lesko</td>
<td>Rosalba Sacca</td>
<td>Jean E. Degrooth</td>
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<td>Carolyn W. Lester</td>
<td>Donna B. Stamm</td>
<td>Geoffrey and Candice Fromme</td>
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<td>Lois Lounsbery</td>
<td>Nancy C. Strohla</td>
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<td>Barbara B. Metz</td>
<td>Rose Marie Tamburri</td>
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<td>Dr. Earl J. Mummert II</td>
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### Ryan’s Circle of Giving Donors

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<td>Miriam Ratner</td>
<td>Academy Di Capelli</td>
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<td>Sylvia W. Rifkin</td>
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<td>David and Laura Roman</td>
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<td>Vivienne Z. Goldstein</td>
<td>The Roman Family</td>
<td>Anita Beloff</td>
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<td>Martin and Blossom Rosenbaum</td>
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<td>Sharon Ruvane</td>
<td>Marion Bixon</td>
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<td>Lois Ann and Stephen Schneller</td>
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<td>Ralph and Debra Sevinor</td>
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<td>Richard and Lori Silkoff</td>
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<td>Milton and Beatrice Smirnoff</td>
<td>George and Ellen Citron</td>
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<td>Leonard and Kaila Margolis</td>
<td>Jerome and Margery Somers</td>
<td>Congregation Beth Israel</td>
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<td>Roy and Patricia Meilman</td>
<td>Julie Somers</td>
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<td>Donna G. Namnoum</td>
<td>Shoshana Sprague</td>
<td>Wendy Davenson</td>
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<td>Robert and Rachel Nislick</td>
<td>Josene M. Steinberg</td>
<td>Jennifer S. Davis</td>
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<td>Sol and Miriam Swersie</td>
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<td>Gary and Ellen Tratt</td>
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<td>Rachelle Tupper</td>
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<td>Kevin and Lee Wise</td>
<td>Lenny, Inge and Gary Fish</td>
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<td>Lenny, Inge and Gary Fish</td>
<td>Marilyn L. Rappoport</td>
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### Council of Business Partners Donors

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<td>Dave and Barbara Preston</td>
<td>BEST Cleaners</td>
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<td>Malloves Jewelers</td>
<td>The Rossi Companies</td>
<td>Connecticut Lighting Centers, Inc.</td>
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<td>Interfaith Golf Tournament</td>
<td>A.R. Mazzotta Employment Specialists</td>
<td>Suburban Stationers Inc.</td>
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<td>McCutcheon Burr &amp; Sons</td>
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### Special Gifts for Grantmaking

#### Grantmaking Partners

- Connecticut Humanities Council: Ann T. D’Addario Family Foundation
- River View Cemetery, Inc.

#### Live Local Give Local Fund Donors

- Advanced Cosmetic Dentistry: Fran and Cynthia Galle
- John and Jean Beckert: Gould & Gilin, P.C.
- Cynthia and Randall Clegg: John V. Heiser
- Clark Development: Beatrice C. Holt
- Cloutier & Cassella: Hudson & Kilby, LLC
- Dzi alo, Pickett & Allen, P.C.: Mary Ann Lambert
- Judith Felton and Gregory Horne: Lorraine L. Lieberman
- Chamard Vineyards: Day Pitney, LLC
- Citizens Bank: How 2 Design
- The Clark Group: Prime Pay, Inc.

### In Kind Donations

- Suburban Office Furniture
- Twin Networks, Inc.
- Young’s Printing
**Unendowed & Special Gifts**

Ronald S. Ashworth  
Jeanette E. Astrauchkas  
Janice Atkeson  
Barbara G. Bartoli  
Karen M. Basedow  
Edie and Marvin Betts  
John and Michele Boccalatte  
Paul A. Bocciarelli, D.M.D.  
Maureen L. Bogue  
William A. Childress and  
Randi J. Bradbury  
Sharon and Herbert T. Clark III  
Cynthia and Randall Clegg  
Dr. Gerald Cohen  
Community Music School  
Joyce and John Conklin  
Betsy Ann Crosswell  
Diane Cummings  
Barbara S. Delaney  
Michael and Carmela Dello  
Arthur and Edythe Director  
David and Carol Director  
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Nancy Fischbach and Martin Wolman  

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Janice J. Warner  
Susan Youngelson

**Special Thanks to our Morning Musing Presenters**

Community Consulting  
Michael Franoceur, Dale Carnegie Training  
Judith Margolin, The Foundation Center  
Carol Mon, Connecticut Storytelling Center  

Susan Merrow, Lobbyist, Connecticut  
Chapter Sierra Club  

Gary Harrington, CFRE  
Talbott Communications Strategies  
Anne Yurasek, FIO Partners

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A&A Office Systems  
Chamard Vineyards  
Citizens Bank  
Citizens Bank Foundation  
The Clark Group  
Essex Financial Services  
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Essex Savings Bank  
Guilford Savings Bank  
Liberty Bank  
Liberty Bank Foundation  
Malloves Jewelers  

Middlesex Hospital  
Dave and Barbara Preston  
Public Welfare Foundation  
Pratt & Whitney  
TD Charitable Foundation

**Matching Gifts**

Aetna Foundation Matching Gifts Program  
Pfizer Foundation Matching Gifts Program  
Merrill Lynch & Co. Foundation, Inc. Matching Gifts Program

**Gifts Given in Honor of:**

Barbara W. Arafah  
John L. Boccalatte, Esquire  
The Brown Family  
Barbara Caruso  
Joseph L. Chartor  
The Clegg Family  
Cynthia H. Clegg  
Kathleen Curtis  
The Descristoforo Family  
Arthur and Edythe Director  
Brett Director  
David Director  
Karen Erickson  
Patricia C. Farrell  
The Fassler Women  
Mary Rosano Franco  
Estelle S. Goodman  
Barry Gordon  
The Grohs Family  
The Hall Family  
Noemi Kearsn  
Robert L. Kirkpatrick, Jr.  
Suzanne Donnelly Kitchings  
Mary Klaren  
Joseph G. Lombardo  
Esther J. McCann-Leopold  
Jane Stokes McMillan  
Willard and Kathy McRae  
Ruth and Christopher Montgomery  
Reginald L. Moody

Martha Ohaus  
Laura M. Pedersen  
David Pels  
Alice E. Pomer  
Julie Rappoport  
Lisa Rappoport  
Marilyn L. Rappoport  
Sari A. Rosenbaum  
Wendy Rutkin  
Christopher Serra  
Deborah D. Shapiro  
Sarah Hope Shapiro  
Ralph H. Shaw II  
Sheila Stooane  
Elizabeth V. Tishler  
Patti Anne Vassia  
Robert Vassia  
Liz Wallace
Gifts Given in Memory of:

Beverly Aronson  Shirley Goodman  Ken Monteith
Michael Augeri  Benjamin Gordon  Ruth Montgomery
Lois G. Baranoff  Ryan C. Gordon  Karen A. Nelson
John Barr  Carolyn R. Greenleaf  Bertha Olenik
Mary J. Beckley  Sophie Gross  Josephine Paola
Theodora Bell  Mary Hall  Helen Patrician
Alan Birmingham  Veronis B. Hall  Herb Patterson
Anthony J. Cairelli  Catherine Hayden  Elizabeth Mary Pernel
Stella Casey  Phyllis A. Howe  Gladys Pinkus
Dr. Neil Citron  Carolyn Johnson  Marjorie Rafal
Ann E. Cubeta  Rabbi Jacob Lantz  Caroline Rucci
Betty Curley  Henry and Beatrice Larson  James Salemi
Louise G. DeLucow  Dr. Alan Lieberson  Lily Marrewa Sarkes
Iva Dillingham  Betty P. Lourie  Ruth Savell
Ellen G. D'Oench  Patricia Manning Mannix  Eva Schects
Betty Faust  Joan Matz  Milton Smirnoff
Gwendolyn and James Felton  Alberta D. McArthur  David Sparks
Frances Fishlock  Margaret Curley McAviney  Debrah Surks
Margaret Fowler  William McCann  Elizabeth Swaim
Doris Gedney  William McCann, Jr.  Barbara G. Werber
Murray Glass  Deborah Mehr  Virginia Holmes White
Helan Goldberg  Helen O. Miller  Charles W. Wilsie, Jr.
Mary Louise Good

Gifts Given in Memory of our Beloved Pets:

Bacchus  Dudley  Pepper the cat

We worked carefully to ensure the completeness and accuracy of this list.
We apologize for any mistakes, misspellings or omissions and ask that you contact Janice at 860-347-0025 to correct any inconsistencies.

MIDDLESSEX COUNTY COMMUNITY FOUNDATION

LEAVE A LEGACY of CONNECTICUT

A planned gift to the Community Foundation is a way to give back to the community and nurture its positive future. Think about what has been important to you and your family and how you would like to ensure its future. Your planned gift to the Community Foundation can endow grants to improve the community and meet changing needs or fund your present annual gift to your favorite charity in perpetuity. You can make a perpetual positive difference and receive potential tax benefit through planned gifts. You should confer with your professional advisors about the best options for your estate plan. We will meet with you and your professional advisors if you wish.

TOP 5 THINGS YOU CAN DO TODAY

1. Prepare a will, and include a gift for the charities that have made a difference in your life or the life of someone you love. Only 50% of those who pass away have a will, and fewer than 3% of those wills contain a charitable gift.
2. You can donate a specific dollar amount or a percentage of your assets, including stocks, bonds, CDs, real estate, vehicles, art jewelry or other property.
3. Name your favorite charity as the beneficiary of your IRA or pension plan.
4. Name your favorite charity as the beneficiary of an existing life insurance policy, or purchase a new policy and name the charity as the beneficiary.
5. Honor deserving friends and remember loved ones with memorial gifts.

MCCF Legacy Society is laying a foundation for Middlesex County. Planned gifts help secure the vitality of the communities in our area. Our Legacy Society recognizes persons who have informed us they have made a planned gift to the community through the Community Foundation. If you have already made a planned gift to our Community Foundation and not informed us, please let us know so we can add you to our list of public and anonymous members.

Our Community Foundation is a proud participant in LEAVE A LEGACY® CONNECTICUT, a statewide public awareness program that encourages people to leave something in their wills to a cause they care about.
The What If Moment

We all give so much — our time, our talent, our donations — but for some, there is always that “What If” moment. “What if I could make even more of a difference by tackling an initiative to make a lasting difference? How can I do more?”

This is just what a group of business leaders asked of the Community Foundation. The answer to this question is Middlesex County Community Foundation’s Council of Business Partners (CBP). After many conversations and discussions on the issues facing the community, they came to realize that they all had been affected by a bully as some point in their lives. They also knew that bullying plagues the children in their community who will become their future employees — our future business leaders.

Working with the Community Foundation and reaching out to the experts at Rushford Center, CBP initiated the “No Bully Zone” program. They focused on middle school children, and in the Fall 2009, programs were launched at Keigwin School and Woodrow Wilson School in Middletown.

The “No Bully Zone” program utilized students as peer leaders. Together with prevention professionals, the student leaders are trained in the anti-bullying curriculum, decision-making skills, and communications skills. In addition, peer leaders increase student and staff awareness on ways to identify, define and report incidents of bullying behavior.

The Middlesex County Community Foundation Council of Business Partners encourages other business leaders and school districts to get involved. Help reduce the incidents of bullying and improve the lives of our future — the children of Middlesex County.

How to Apply For a Grant

The Middlesex County Community Foundation offers one competitive grant cycle annually and looks for grants that add value to, and have a positive impact on, the health and vitality of the Middlesex County Community. The Community Foundation welcomes grant applications from any nonprofit organization serving the towns of Middlesex County. Eligible organizations may have either a 501(c)3 or 170(c)1 designation. Grants are made in several focus areas including arts and culture, education, heritage enhancement, animal welfare, the environment, health and human services, and programs serving women and girls.

During the annual grants cycle, interested organizations are encouraged to submit a Letter of Intent (LOI) Application. In June of each year applications are available on the Community Foundation’s website, and the submission deadline is the first week of September. Grants are reviewed by either the Community Foundation Grants Committee or the MCCF Fund for Women & Girls Grants Committee. Organizations selected to submit a full proposal will be notified in mid-October; proposals are due in November; and final grant recommendations are made to the Board of Directors by the Grants Committees in mid-December.

Grant proposals should address a need within the focus areas specified during the competitive cycle and demonstrate impact on the organization, project, community or persons served. The Community Foundation seeks applications for projects that possess some of the following elements:

- address a documented need or concern of the focus area;
- recognize and build on a community’s or organization’s strengths and assets;
- build the capacity of community organizations and/or individuals to help themselves over the long term;
- foster cooperative approaches to community issues through collaborations based on shared visions and mutual responsibility;
- serve as a catalyst for attracting other resources, such as matching gifts; and
- build infrastructure within the organization in order to meet its mission.

Normally the Community Foundation will not award grants to:

- endowments,
- Capital campaigns,
- building programs,
- fund debt reduction,
- lobbying,
- individuals, or
- political organizations and campaigns.

Organizations awarded grants are expected to incorporate a media relations outreach program to provide visibility for both the individual nonprofit organization and the Community Foundation. Final evaluations are required measuring goals, objectives and outcomes, and are to be filed upon the completion of the grant. The Community Foundation Grants Committee and staff visit grantees for program updates and organization information sessions to better assist Middlesex County nonprofit organizations to succeed in their mission.
COMMUNITIES SERVED:

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

This report is generously provided by Pratt & Whitney