PHILANTHROPY MATTERS

- **DONORS CARE AND NURTURE THE COMMUNITY**
  - For the fourth year in a row, you put your hearts into action by donating over $1 million in gifts and pledges to the Community Foundation. You - our founders, donors, stakeholders – continued your generous ways and together we made life better for all, one neighbor at a time.
  - Nine (9) donors joined their friends and colleagues in establishing new Funds to benefit nonprofit organizations for generations to come through grants, and, thus brighten the lives of those they serve.
  - Four (4) individuals added their names to The Legacy Society knowing that they will make a difference in the lives that follow through our Community Foundation. Planned Gifts at the Community Foundation grew to over $13.5 Million.
  - The President’s Society and Chairman’s Circle, a group who donate $1,000 or more for our operations and administration, expanded to a record sixty-nine (69) as new community members joined forces to help support the Community Foundation’s future.

PHILANTHROPY WORKS

- The Community Foundation’s investment in Middlesex County continued. Record grants of over $319,000 helped nonprofit organizations improve the lives of those they serve in Middlesex County. Since our founding, the Community Foundation has assisted more than 220 nonprofit organizations through 683 grants with over $1.9 million, enabling them to continue their good works in the arts and culture, environment, human services, heritage enhancement, education and animal welfare.
  - Once again, our partners in grant making - Connecticut Humanities Council, River View Cemetery, the Ann T. D’Addario Family Foundation and Citizens Bank – invested with the Community Foundation and added to earnings from our individual donor funds to support our nonprofits organizations and their extraordinary work and services.
  - For the third year in a row, our Nonprofit Resource Center offered free monthly seminars, workshops and Association of Fundraising Professionals’ webinars to our nonprofit colleagues. Since its inception in 2008, over 950 nonprofit leaders and volunteers have expanded their knowledge and professional skills with nationally recognized experts through the Nonprofit Resource Center at little or no cost.

**TOGETHER WE CARED – SHARED – AND MADE A DIFFERENCE IN MIDDLESEX COUNTY**

**IN MEMORIAM**

Sadly, in 2011, we lost four remarkable, inspiring women who were dedicated to Middlesex County Community Foundation - Ellen Patterson of Durham, Edythe Director of Cromwell, Sari Rosenbaum of Portland, and Kate Swift of East Haddam.

Our heartfelt sympathies go to their families. They are missed each and every day.
At Middlesex County Community Foundation, we are committed to the power of philanthropy and how it transforms lives, inspires people and motivates resources to strengthen our community. In 2010, you, our neighbors and friends, combined efforts with the Community Foundation to leverage more resources – human and financial – than ever before for the good of all in Middlesex County. So we start this 2010 Annual Report just as we should – with a sincere THANK YOU to you, our stakeholders, and for what you make possible.

In 1997 MCCF began as a grass roots effort - with donations from numerous sources. By the end of 2010, TOGETHER, we have invested in more than 220 nonprofits through 683 grants and have given back over $1.9 million to the community. Now that’s philanthropy in action!

2010 was a remarkable year in so many other ways. 330 new donors stated through their gifts that they believe their donations will make a difference now – and forever. Nine (9) new funds have been established by wonderful people to create a positive impact on their neighbors today, tomorrow and well into the future. Yet again, your generosity helped us realize over $1 million in new gifts and pledges for the fourth consecutive year.

Under the excellent leadership of the Board of Directors and Finance & Investment Committee, our pooled assets grew to over $6 million and the portfolio experienced a positive 12.8% rate of return. Finally, because of you and our generous funding partners (River View Cemetery, Connecticut Humanities Council, D’Addario Family Foundation and Citizens Bank), we reinvested fifteen percent (15%) more than in 2009 in our communities, through our grants to nonprofit organizations.

As stakeholders in our Community Foundation, we all have many reasons to be proud of what we’ve given back to the community over the past thirteen years. Yet, there’s even more to applauded.

Middlesex County Community Foundation was recognized as “Connecticut’s Outstanding Foundation of the Year” by the Association of Fundraising Professionals, underscoring our belief that “Everyone Can Be a Philanthropist” and that “Philanthropy Does Indeed Matter” and “Philanthropy Works”.

MCCF also received the “Community Service Award” given by the Connecticut Rivers Council, Boy Scouts of America. We were pleased and humbled to accept both awards on behalf of everyone in Middlesex County who believe that all of us, working through the Community Foundation, indeed, exemplify the principle of “Good People Doing Great Things”.

We welcome Gary Salva of Middlefield and Lyn May of East Haddam, to the Board of Directors who join us in our efforts to make our region better than it already is. They bring a wealth of knowledge about our community and a passion for philanthropy. We also acknowledge the many contributions of our strong and able staff and our numerous, enthusiastic volunteers who add to our ability to continue to invest in and improve the quality of life in our region.

The concluding high note to 2010 was expanding our list of Directors Emeriti by a significant “one.” Biff Shaw was unanimously elected in 2010 in recognition of his extraordinary contributions to the Foundation. He inspires us all with his passion to give back and his enthusiasm for the Foundation and its work.

It is our privilege to work with you, people who give of yourselves and who truly connect with your community to improve the lives of others. THANK YOU hardly seems adequate for what you make possible through the Community Foundation. So, Merci, Dankie, Fa’afetai, Hvala, Spasibo, Gracias!

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.
Shoreline Soup Kitchens & Pantries provides food and fellowship to those in need.

Vista Vocational & Life Skills provides programs to support independent living for adults with neurological disabilities.

Filming the No Bully Zone video thanks to the support of MCCF Council of Business Partners.

Middletown School Readiness Council brings storytelling and reading to life for Middletown preschools.

Portland Historical Society and Eagle Scout Dylan McDougal provided new audio station podiums at the Ruth Callander House Museum.

Connecticut Mission of Mercy Dental Outreach Clinic, Middletown offers free access to more than 1,700 people in two days.
We aim to know our community’s nonprofit organizations so well that we can help them anticipate needs and offer them the right resources – whether funding, training, or technical assistance – before they ask.

COMMUNITY INVESTMENTS

As Middlesex County’s only Community Foundation, we don’t believe in business as usual. Meeting our mission requires relentless pursuit of effectiveness and efficiency in the grants that we fund. No two years are ever the same for this Community Foundation – nor should they be. Our role is to become whatever the community needs us to be.

This year MCCF awarded $319,000 in grants to expand transportation services for underinsured elderly and infirm patients, educate and engage girls in the math and sciences fields, preserve the lifecycle of osprey families living on the Connecticut River and more. We trained community leaders, strengthened nonprofit boards, and promoted civility throughout our region through programs like the Council of Business Partners No Bully Zone.

Funding and support available to nonprofits in 2010 included:

• Operating grants
• Community enhancement grants supporting mentoring and tutoring programs
• Enrichment grants for introduction to the arts programs
• Workshops on sponsorship and event management assistance to leverage funding opportunities
• Technology funding to meet growing demands for accessibility and software management tools
• Seminars on how to develop new Legacy Planning Programs for nonprofits and their Boards

We enjoy working with our nonprofit colleagues and providing support BEYOND THE GRANT in order to “make their good work better!”

Chuck Loring joined 90 nonprofits for a day-long workshop on Board Governance and Fundraising thanks to support from TD Bank

Heather Tolley-Bauer, Done on the Run, Inc., offered the “Fate of Your Fete” at a Morning Musings workshop
As Middlesex County continues to persevere in the economic crisis, the Board of Directors understands that 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 $319,120.44 in grants for 2010. Of this amount, $129,589 was competitive; $106,492.33 was designated; $81,355.11 was donor advised; and $1,684 was Agency Funds.

### Competitive Grants

#### Grants for Animal Welfare and Related Services

**High Hopes Therapeutic Riding** / $1,000 / Haddam-Killingworth Youth with cognitive, physical and emotional disabilities benefit from therapeutic riding and other equine-assisted activities.

#### Grants for the Arts

**Greater Middletown Chorale** / $5,000 / to fund an expansion of duties for the Artistic Director, including developing new relationships with composers and artists in allied fields like theater.

**Green Street Arts Center** / $2,500 / for “Arts in Our Communities” program which provides free arts education with partnering organizations in communities throughout Middlesex County.

**Ivoryton Playhouse Foundation** / $5,000 / to partially fund a fully developed marketing plan provided by Outthink.

**NEAR, Inc./Buttonwood Tree** / $2,050 / for new computer equipment.

**Oddfellows Playhouse** / $3,000 / to partially fund capacity building initiatives, including communications strategies.

**Salt Marsh Opera** / $1,500 / $1,500 / for an outdoor concert, “Opera in the Park,” in collaboration with The Katherine Hepburn Cultural Arts Center.

**Tracy Art Center** / $3,000 / to partially fund new senior administrative position.

#### Grants for Education

**Bushy Hill Nature Center** / $3,000 / to support programming costs and a full-time instructor.

**Durham-Middlefield Youth & Family Services** $3,500 / for a program coordinator supporting an enrichment collaboration with Durham Public Library offering structured after-school programming.

**Essex Library Association** / $1,000 / for “GuyZone,” a six-week, life skills program for boys age 13 to 16.

**I Have A Friend Youth Center** / $3,000 / to fund a staff person who provides programming and resources to children and their families through after-school activities.

**Ivoryton Library Association** / $3,720 / for a “Great Works of Music and Literature: Read, Hear and See” program.

**Literacy Volunteers Valley Shore** / $2,024 / for tutor training workshops.

**Middlesex Hospital – Family Advocacy Program** / $3,000 / to support a program to empower parents and caregivers of children with challenging behavior through in-home parent education and skills development.

**Middletown School Readiness Council** / $2,500 / to support a storytelling performances program for three hundred fifty (350) low-income preschoolers in seven (7) Middletown preschools, and free books to preschoolers and toddlers.

**Mount Saint John** / $1,250 / to support a portion of the cost of intensive on-site training for employees.

**Natchaug Hospital** / $5,000 / to provide equipment and furnishings for the new Old Saybrook Joshua Center facility which will provide treatment services for youth in twelve towns in lower Middlesex County and surroundings.

**Vista Vocational & Life Skills Center** / $3,025 / for marketing Vista Vittles, a component of the employment training provided to adults with disabilities.
Grants for the Environment

Connecticut Forest & Park Association / $1,500 / to fund a technology upgrade to the WalkCT website.

Essex Land Trust / $3,000 / to fund the installation of a camera and video relay system on Thatchbed Island to monitor osprey and their young.

Essex Land Trust / $3,000 / to fund the installation of a camera and video relay system on Thatchbed Island to monitor osprey and their young.

Grants for Heritage Enhancement

Connecticut River Museum / $5,000 / for technology and software upgrades, including data conversions and hardware.

Essex Historical Society / $1,000 / for an educational history program designed for second and third grade students at Essex Elementary School, including trips to Pratt House, Hills Academy, and Essex town archives.

Haddam Historical Society / $1,500 / to develop an exhibit celebrating the town’s 350th anniversary, highlighting the town’s rich heritage and contributions to Middlesex County and Connecticut.

Ivoryton Playhouse Foundation / $2,620 / to fund, in conjunction with Connecticut Department on Culture and Tourism, a Commemorative Centennial Program featuring a written history of the playhouse and historic photos.

Grants for Human Services

East Haddam Free Public Library / $1,200 / for technology upgrades and additions to implement community education and entertainment evenings.

Estuary Council of Seniors, Inc. / $3,000 / to help fund Meals on Wheels (MOW) in the nine-town estuary region.

FISH for C.D. & E. (Chester, Deep River and Essex) / $2,200 / to provide free transportation for patients in need who are residents of the Lower County.

Gilead Community Services / $5,000 / to support “Healthy from Head to Toe,” a program providing dental and podiatric examinations to individuals living with severe mental health conditions.

Hope Partnership / $3,000 / to hire a marketing and communications professional who will focus on developing name recognition and design materials to further HOPE’s mission.

Kuhn Employment Opportunities / $3,850 / to provide peer-to-peer outreach to unemployed individuals living with mental illness in Middlesex County.

Middlesex Habitat for Humanity of Connecticut / $5,000 / to support the ReStore.

Middlesex County Coalition on Housing and Homelessness / $2,500 / to support staffing and implementation of Middlesex County’s Ten Year Plan to End Homelessness.

Sail Connecticut Access Program / $5,000 / for staffing and program costs due to an increase in demand for services.

Shoreline Soup Kitchens and Pantries / $5,000 / for the purchase of wholesale food to augment food distributed to pantry participants.

St. Luke’s Eldercare Solutions of Central Connecticut / $5,000 / to help fund a collaborative program with Middlesex Hospital providing free transportation service to low income patients being released from the hospital; to seniors for out of area medical appointments; and to veterans to VA facilities.

St. Vincent DePaul Place / $1,800 / for Community Assistance Program staff to guide people in need of long-term solutions to overcome homelessness, addictions and debilitating challenges.

Valley Shore YMCA / $5,000 / for a collaborative program with Middlesex Hospital Cancer Center to provide a unique, managed fitness program for cancer survivors.

Grants for Women and Girls

Community Health Center-New Horizons Domestic Violence Services / $700 / to assist shelter residents and community clients with transportation costs.

Deep River Public Library / $2,000 / to fund a program to engage girls in the maths and sciences fields.

Middlesex Community College Foundation / $2,000 / to provide support for childcare programs and other critical support services for women attending classes.
Middlesex County Coalition on Housing and Homelessness / $1,000 / for the Women’s Homelessness Prevention Project which helps single mothers with children who are at risk of becoming homeless.

Middletown Public Schools / $500 / for the Parent Leadership Training Institute, enabling parents to become leading advocates for children.

Westbrook Youth & Family Services / $1,000 / to provide therapeutic support for women and older girls who have experienced sexual abuse and violence trauma and have little or no ability to pay for counseling.

YMCA of Northern Middlesex County / $1,500 / to foster environmental stewardship through an after-school program for girls and guided hikes for women.

**The following three grants are being awarded in honor of Arianna Huffington, in celebration of her accomplishments and as a generous thank you for her donation to the Fund for Women & Girls at their benefit event on November 3, 2010.**

Durham Middletown Youth & Family Services / $1,000 / to partially fund the “True You” program, a five-week, mother-daughter self-esteem building program, culminating in the True You Expo

Epoch Arts / $3,000 / to fund the Breaking Silences program, designed for at-risk girls in grades 6 to 12, which creates an artistic environment in which they can express themselves and deal with problems in a positive way.

Middlesex County Historical Society / $650 / for a walking tour of Women’s History in Middletown, in commemoration of Women’s History Month, March 2011.

Competitive Grants Total: $129,589

Grants from Designated Funds

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

Community Music School / $610 / Carolyn R. Greenleaf Scholar Fund.

Cromwell High School / $1,000 / Arthur and Edythe Director Family Scholar Fund.

Town of Essex / $7,500 / for the Hospital Albert Schweitzer in Deschapelles, Haiti and the community it serves (the "Initiative") / Sister Cities Essex-Haiti Fund.

Town of Essex / $5,000 / Sister Cities Essex-Haiti Fund.

Middletown Public Schools / $9,000 / To support the Swaim Strings Program / Elizabeth Swaim Arts Enrichment Fund.

Middletown Rotary Club / $1,000 / Arthur and Edythe Director Family Middletown Rotary Fund.

Morgan High School / $4,000 / Bill’s Seafood Golf Tournament Scholar Athlete Grants / Bill’s Seafood Golf Tournament Scholar Athlete Fund.

Middlesex County Historical Society / $2,332 / Elizabeth Swaim Middlesex County Historical Society Fund.

Middlesex United Way / $10,000 / $7,500 to support the Homelessness Prevention Fund and $2,500 to support the work of the Coalition / Griffin Family Unendowed Fund and anonymous donors.

Nathan Hale-Ray High School / $1,250 / Fifth Annual Ashworth Education Grant / Ashworth Family Scholar Fund in memory of Ronald and Heather Lind Ashworth.

North End Action Team / $5,000 / Live Local Give Local for NEAT Fund.

Old Saybrook High School / $4,000 / Bill’s Seafood Golf Tournament Scholar Athlete Grants / Bill’s Seafood Golf Tournament Scholar Athlete Fund.

Tri-Town Youth Services / $562 / Tri-Town Youth Services Fund.

University of Connecticut / $500 / Joan Matz Music Scholar Fund.

Valley Regional High School / $4,000 / Bill’s Seafood Golf Tournament Scholar Athlete Fund.

Westbrook High School / $6,000 / Bill’s Seafood Golf Tournament Scholar Athlete Fund.

YMCA of Northern Middlesex County / $10,770.58 / Northern Middlesex YMCA Camp Ingersoll to support capital acquisition and replacement equipment purposes for the Ingersoll Outdoor Center / Ingersoll Outdoor Center Fund.

YMCA of Northern Middlesex County / $40,967.75 / Ingersoll Outdoor Center / Ingersoll Outdoor Center Fund.

Designated Grants Total: $106,492.33
Grants from Donor Advised Funds

From the following funds: Avery’s Fund, John and Jean Bechert Unendowed Donor Advised Fund, Council of Business Partners Fund, Hugh L. and Judith R. Cox Fund, Griffin Family Unendowed Fund, Robert A. Mallinson, Ph.D. Fund, Elizabeth Mary Pernel Fund, President’s Discretionary Fund, Ryan’s Circle of Giving Fund and anonymous donors.

Atlantic Classical Orchestra / $5,000
Connecticut Aeronautical Historical Association / $500
Connecticut River Museum / $3,000
Cystic Fibrosis Foundation / $3,178.25
International Foundation for CDK5 Research / $30,000
Kingswood-Oxford School / $3,178.25
Middletown High School / $250
Middletown Public Schools / $1,265
Middlesex Community College Foundation / $3,100
Middlesex Habitat for Humanity of CT / $3,000
Middlesex Hospital / $1,000
Rushford Center / $15,911.11
Shoreline Soup Kitchens & Pantries / $515.50
Saint Peter’s Church / $3,600
St. Vincent DePaul Place / $1,500
Trinity College / $3,178.25
Yale Cancer Center / $3,178.25

Donor Advised Grants Total: $81,355.11

Grants from Agency Endowment Funds

Oddfellows Playhouse / $1,684.00 / For Capital Improvements / Oddfellows Playhouse Endowment Fund

Agency Endowment Grants Total: $1,684

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, animal/human welfare and services, education, heritage enhancement, 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 July of each year applications are available on the Community Foundation’s website, and the submission deadline is the first week of September. Applications 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;
- 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.
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.

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.

CONNECTICUT HUMANITIES COUNCIL provides consultation to improve heritage grant making through the Community Foundation. They also continue to provide $10,000 for 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.

“We are delighted to partner with MCCF. It helps build the Council’s community visibility and augment MCCF’s capacity to fund heritage and humanities projects in the communities MCCF serves. As a state-wide organization, the opportunity to work with a community foundation helps Connecticut Humanities Council reach deeper into the community to support organizations of all sizes.”

- Laurie Rayner, Director of Heritage Revitalization Fund, Connecticut Humanities Council

CITIZENS BANK FOUNDATION supported the Community Foundation’s competitive grant making with $5,000 for neighborhood enhancement programs. Grants supported organizations working on community development initiatives for economically distressed areas, innovative projects addressing economic self-sufficiency, and safe neighborhood enhancement and mentoring programs.

RIVER VIEW CEMETERY established a fund in 2001 to provide assistance with unrestricted grant making. They increased 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.

"We are very pleased with how our partnership with Middlesex County Community Foundation has evolved over the past decade. With principled, focused management, the Foundation consistently identifies, educates, and helps set achievable goals for those nonprofit organizations that create a more vibrant, better quality of life for our community. Our trust in them is rewarded year in and year out with tangible results that we would be hard pressed to achieve on our own."

- Roger Field, President, River View Cemetery, Inc.

"We are grateful for the support and generosity of our philanthropic partners and their contributions to grant making within our communities."

THE POWER OF PARTNERSHIP ... MAXIMIZING THE POWER OF PHILANTHROPY AND STRENGTHENING OUR COMMUNITIES

Ivoryton Library Association

Middlesex Habitat for Humanity of Connecticut, Inc.
**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 (UR)** These funds allow the Board and staff to identify compelling community needs and the best use of your charitable dollars to address them.

**DESIGNATED FUNDS [DS]** These funds support your best-loved nonprofits forever by creating a predictable and valuable revenue stream to further their general mission or specific programs.

**DONOR ADVISED FUNDS [DA]** These funds allow individuals, families, or businesses who wish to recommend where the fund’s dollars might do the most good, year in and year out.

**FIELD OF INTEREST FUNDS [FI]** These funds allow the Foundation to support promising projects and nonprofits working in areas of interest to our donors such as the needs of young children, the environment, the homeless, or the arts. The Fund for Women and Girls and ARF are good examples.

**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.

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The following pages represent you -- points of interest, areas of concern, hopes and dreams -- all those things that make Middlesex County a great place to live, work and play. The individuals, businesses and organizations represented by the funds on the following pages truly are **Good People Doing Great Things in and for Middlesex County**!
Donors contribute because they care …..

Maybe you want to provide someone else with an opportunity you enjoyed or preserve a piece of the community you love. Whatever your charitable interest, when you establish a Fund at Middlesex County Community Foundation, you make a good deed better. Our donors become part of something bigger than their individual acts of charity – they become philanthropists.

This year, generous donors created nine (9) new funds at the Community Foundation for nine (9) different reasons. Together, they will improve the quality of life in all aspects of our community and will secure a Brighter Future through their generosity.

Please read on to meet Middlesex County’s newest philanthropists…and if you see an idea you like, let us know how we can help you customize your own philanthropic goals. Your community will be better for it.

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Avery’s Fund (2010) [DA]

A RARE DISEASE HAS A LOCAL FACE
CDK5. A rare disease with no apparent cause, no cure, and a very clinical name. Yet, for Middlesex County and its surrounding neighbors, this disease has a very personal and lovely face – Avery Rose Leopoldino of Old Saybrook.

Avery, at the age of two years, was diagnosed with this extremely rare disease. At the age of 6 weeks, she began experiencing frequent seizures and was originally diagnosed with epilepsy. Upon learning from doctors that Avery did not have epilepsy but a very rare genetic disease with no known cure, Avery’s parents, Mark and Kristin, had to take a long pause and start over at the beginning, with both decisions and research.

To bring attention to this disorder and aid in the support of research, Bill’s Seafood in Westbrook took up the cause during the summer of 2010. With the help of friends, a lemonade stand was erected outside the restaurant and featured Avery’s photo. During the month of July 2010, Pepsi donated lemonade and proceeds of the sales were donated for CDK5 research.

Mark and Kristin partnered with Middlesex County Community Foundation, creating Avery’s Fund, a donor advised fund that supports the research into the cause and a cure for CDK5.

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John and Irene Bolden, Sr. Scholar Fund (2010) [DA]

Irene and John D. Bolden, Sr., life-long residents of the Albany Community of Georgia, believed that education is key to a bright and financially secure future. Although John and Irene had limited formal education themselves, they were determined their six children, including Middletown’s own Kathy Bolden McRae, would thrive and succeed with a foundation securely built in education and faith.

Each of their children graduated with honors from Monroe High School in Albany, Georgia. They, along with their children, have pursued professions that are wide reaching and emblematic of John and Irene’s belief in the moral and financial stability provided by a solid education. The Bolden children and grandchildren are doctors, CEOs, school principals, public health administrators, teachers, builders/contractors – and vibrant, loving, committed members of their respective communities.

To honor their parents’ belief, Kathy Bolden McRae and her siblings established the Irene and John Bolden, Sr. Scholarship Fund in 2006 for qualifying graduates of Monroe Comprehensive High School, Georgia. In 2010, they worked with Middlesex County Community Foundation to establish the John and Irene Bolden, Sr. Scholar Fund at the Community Foundation, which will continue the Boldens’ legacy to support graduates at Monroe Comprehensive High School, Albany, Georgia.

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Griffin Family Endowed Fund (2010) [DA]

Continuing their good works, the Griffin family of Durham established a Donor Advised Endowed Fund at Middlesex County Community Foundation. Endowed funds provide for the future as well as today, and this fund meets the Griffins’ investment in Middlesex County, highlighting both their desire to share the purpose of charitable giving with their children and with future generations.
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 Endowed Fund. The Griffins state that by 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 MATTERS. PHILANTHROPY WORKS.”

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**Dr. John Hennelly Fund (2010) [DS]**

**CREATING PARTNERSHIPS THROUGH DEDICATION AND LEADERSHIP**

Dr. John Hennelly spent his career as a leader in education, an English teacher, Language Arts Coordinator, Administrator and trusted mentor. He joined the Middletown Public Schools (MPS) as the Assistant Superintendent for Curriculum/Instruction in 2000 and quickly became involved in many aspects of the school district and community.

During his nine years at MPS, John worked diligently to provide countless opportunities for both students and teachers to excel and managed top quality education programs serving the community. He oversaw the Mentor Program for First and Second Year Teachers, the 21st Century After School Grant, Summer Academic Enrichment Program, CAUSE (Community & University Services for Education), Silent Sounds and so much more. John’s commitment to education and the children in the Middletown district extended to the many councils and organizations of which he was an active member. John participated on the Middletown School Readiness Council, Middletown Public Schools Cultural Council, Middletown School Family Connection and Green Street Arts Center.

To celebrate John’s commitment to Middletown Schools, MPS employees honored his work upon his retirement by establishing the **Dr. John Hennelly Fund** at Middlesex County Community Foundation. This Designated Fund will support Middletown Public Schools and proceeds of the Fund will support K-12 fine and performing arts programs in the school district.

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**Mary Ann Lambert Random Acts of Kindness Fund (2010) [UR]**

Middlesex County Community Foundation lost a dear friend and colleague, Mary Ann Lambert, in August 2010. 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 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 are “wife” and “mother.”

Mary Ann gave so much more to Middlesex County Community Foundation than she ever received in compensation. For that, and for so much more, we are grateful for her love of this community. Her friends and colleagues established this Fund to honor her caring ways.

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**Phyllis M. Mcdowell Fund (2010) [FI]**

**PIONEERING VOLUNTEER AND COMMUNITY ACTIVIST**

Phyllis McDowell humbly and quietly will tell you she started her career in volunteerism because she had nothing to do. She just had too much time on her hands and too much energy to waste. Phyllis, a resident of Chester and Fenwick, believes that helping others – and everything around you – is an obligation and a privilege.

Her “volunteer career” began in New Haven. Phyllis founded Fellowship Place which went on to become highly recognized for its pioneering ways of treating mental health patients through art therapy, vocational training and by fostering an open and welcoming environment for socializing.
Phyllis still serves on the board of Fellowship Place and yet she still seems to have energy to spare. Now she has set her sights on another avenue to channel her passions and enthusiasm - the environment. Inspired by the beauty of Middlesex County and still believing that we can all make a difference, she established the PHYL LIS M. MCDOWELL FUND, a Field of Interest Endowed Fund, to ensure that our region’s natural resources are enhanced, not diminished, and that Middlesex County remains a unique area to enjoy – and to live, work, play and treasure. Now and forever.

We are grateful to Phyllis for working through the Community Foundation to truly make a difference.

**Middlesex United Way Endowment Fund (2010) [DS]**

Endowments strengthen organizations and help secure their future. The Middlesex United Way recognized this in 2001 when it was the first organization to establish an agency fund with the Community Foundation. In 2010 Middlesex United Way again chose to work with the Community Foundation to establish an endowed fund that will benefit the broader community for years to come. Their decision emphasizes their trust in the expertise the Community Foundation offers to expertly manage their gifts.

**Sister Cities Essex-Haiti Fund (2010) [DS]**

OPEN HEARTS…..HELPING HANDS

Sister Cities Essex Haiti was created by the Town of Essex and some dedicated residents in the spring of 2010. It was formed shortly after the devastating January 2010 earthquake in Haiti and its mission is to build a mutual long-term sustainable relationship between the people of Essex and the people of Deschapelles, Haiti, their extended communities, and the Hospital Albert Schweitzer located in Deschapelles.

Sister Cities Essex Haiti works to build cooperation between the people of these communities, enabling them to learn, work and solve problems together through an exchange of educational, cultural, professional, municipal, business and technical initiatives and projects.

The group established a Designated Fund at the Community Foundation, which views Sister Cities Essex Haiti as a wonderful example of how people in Middlesex County reach out, not only to help others in need here and outside our region, but also to educate all about the power of GIVING. The Community Foundation believes Sister Cities Essex Haiti will establish a relationship with people beyond its borders that will enrich Middlesex County residents through a greater understanding on one another’s culture and characteristics.

**Williams-Rosen Memorial Fund for Veterans (2010) [DA]**

HONORING THOSE WHO SERVE

Greg Kalkreuth is very much like many young people in their 20’s – he works hard, spends time with friends and family, saves for the future and generally enjoys all that life has. Greg is so very grateful for all that he has and can do, and he wanted to find a way to give something back. He began talking with his mother who happens to work for the Community Foundation. She talked about the many Funds started by people who wanted to make a difference, what they support and how to get involved … but nothing truly resonated for Greg.

Amidst all of this discussion, the conversation gravitated to the courageous men and women serving their country around the world and the sacrifices they make. This, in turn, brought to mind previous generations of Greg’s own family who had served their country and how life had changed for veterans who came back to their home communities, and the difficulties they face.

Greg decided he wanted to do something to support veterans returning to Middlesex County, to show them that someone cares and appreciates all they have given in their service to our country.

He knew he also wanted to honor the memory of his great uncle, Nelson D. Williams and his grandfather, John E. Rosen, Jr. both of whom served in the armed forces in World War II. Nelson D. Williams, a corporal in the United States Marines, was the youngest brother of Greg’s paternal grandmother, and was killed on Iwo Jima at 18 years old. Greg’s paternal grandfather, Lieutenant Rosen, served as an air force bomber pilot in Italy with the 461st Bomb Group.

Greg decided to establish the Williams-Rosen Memorial Fund for Veterans Fund. This Donor Advised Fund will support veterans in Middlesex County. Greg hopes that this Fund will encourage others in the Middlesex County community to support the men and women who so courageously serve around the world.
ANIMALS: RESPECT AND FRIENDSHIP ‘ARF’ FUND (2008) [FI] Support 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) [FI] Support Middlesex County botanical beautification and enhancement of the environment through horticulture and forestry.

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


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

BEE & MISSIONARY SOCIETY OF FIRST CONGREGATIONAL CHURCH OF MIDDLETOWN FUND (2005) [UR] Established in 2005 to continue their 175 years of support to organizations and worthy causes in the community.

BEE & MISSIONARY SOCIETY FUND FOR WOMEN & GIRLS (2003) [FI] Provides support for the Fund for Women & Girls Committee to make grants.

BILL’S SEAFOOD GOLF TOURNAMENT SCHOLAR ATHLETE FUND (2009) [DA] To support education grants at four high schools serving the towns of Westbrook, Clinton, Old Saybrook and the Valley Regional High School (Chester, Deep River, and Essex).

CHARLES MUNSON BURR, JR. FAMILY FUND (1999) [DS] Harry Eben Burr is building this Fund over time to honor his father with grants for disadvantaged Wesleyan students.


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


COUNCIL OF BUSINESS PARTNERS FUND (2009) [DA] A dedicated group of local business leaders committed to creating and supporting safe communities for the future business leaders in Middlesex County; the first program of this Fund is the No Bully Zone.


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

HUGH L. AND JUDITH R. COX FUND (2000) [DA] Hugh and Judy annually support their favorite charities and worthy causes of their choice from this Fund.


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

ARTHUR AND EDYTHE DIRECTOR FAMILY NUTMEG BIG BROTHERS BIG SISTERS FUND (2007) [DS] Art and Edythe established this Fund to support mentoring programs and the benefits of good big brother/big sister match-ups for our young people for years to come.

ARTHUR AND EDYTHE DIRECTOR FAMILY YMCA CAMP INGERSOLL FUND (2007) [DS] Art and Edythe established this Fund to help sustain the programs provided at Camp Ingersoll and to continue the positive camping and outdoor experiences for youth and families in our county.

ARTHUR AND EDYTHE DIRECTOR FAMILY MIDDLETOWN ROTARY FUND (2008) [DS] Recognizing the next generation as our future leaders, Art and Edythe established this Fund to benefit the youth of northern Middlesex County.

ARTHUR AND EDYTHE DIRECTOR FAMILY RUSHFORD FUND (2007) [DS] Art and Edythe believe we all have an obligation to fight against juvenile substance abuse and bullying. This Fund will help the Rushford Center continue its programs and initiatives to help our young people grow and prosper in positives ways.

ARTHUR AND EDYTHE DIRECTOR FAMILY CROMWELL HIGH SCHOOL FUND (2008) [DS] In recognition of the important role Cromwell High School has played in their family’s lives, Art and Edythe established a Fund to provide grants for deserving Cromwell High School seniors.

NANCY FISCHBACH AND MARTIN WOLMAN FUND (2009) [DA] Established to have a significant and direct positive impact on the communities in which they live, work and play, this Fund exemplifies Live Local Give Local.

CAROLYN R. GREENLEAF MEMORIAL FUND (2008) [DA] To support the musical education of students who show great dedication to, and promise in, musical studies.
GRIFFIN FAMILY UNENDEDOWED FUND (2009) [DA] Established to support the many programs and partnerships in which MCCF is involved, and to establish a foundation of family philanthropy they can share with their children.

LEE AND WELLES GUILMARTIN FUND (2002) [UR] To meet the needs and improve the quality of life in our community.

PETER AND EILEEN HARDING FAMILY FUND (2002) [UR] 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.

JACQUELINE HUBBARD & NORMAN NEEDLEMAN HONORARY FUND FOR THE IVORYTON PLAYHOUSE FOUNDATION (2007) [DS] 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.

INGERSOLL OUTDOOR CENTER FUND (2007) [DS] 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.

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

KIRKPATRICK FAMILY FUND (2002) [FI] 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.

MARY KLAAREN FUND FOR WOMEN AND GIRLS (2007) [FI] Lee Guilmartin established this Fund to honor the many contributions and service to others provided by the Reverend Mary Klaaren.

LIVE LOCAL GIVE LOCAL FUND (2009) [UR] The Community is where we work, where we play, where we raise our children, where we call home. Our community has given us so much. It is our responsibility to give back and show good stewardship. As stewards of our towns and protectors of our environment, we need to support local businesses and services to ensure their survival and help the nonprofits who rely on the generosity of others to run their programs. 100% of gifts to this Fund are granted to local nonprofits each year.

LIVE LOCAL GIVE LOCAL FOR NEAT FUND (2009) [DS] Established by Dr. Gerald and Judy Cohen in recognition and support of the great work of NEAT and its members.

LOFFREDO PERFORMING ARTS FUND (2006) [FI] 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.

J. GUY LOMBARDO DONOR ADVISED FUND (2003) [DA] A transfer from a private foundation, this fund provides grants to local charities recommended by the Lombardo family.


ROBERT S. MALLIMSON, PH.D. FUND (2004) [DA] This donor advised fund was established by an anonymous donor in lasting tribute to the humanity and caring of Dr. Mallimson.

IDA M. MASSELLI FUND (2009) [DA] Ida Masselli instilled a strong sense of commitment to others and equality to all in her family, and this Fund was established in her honor by her son Mark and his family.

IDA M. MASSELLI NAACP FUND (2009) [DS] Established by Mark Masselli and his family to support the NAACP-Middlesex Chapter in honor the lifetime of activism and commitment his mother gave to her community.

JOAN MATZ MUSIC SCHOLAR FUND (2004) [DS] A memorial fund for University of Connecticut students of choral studies was established by the family and friends of Joan Matz, founder of several area choral groups.

HOWARD AND YVONNE MCAULIFFE FUND (2000) [DA] The McAuliffes use this Fund to contribute 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.

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


MEHR FAMILY FUND (2009) [DA] Established by her family, this Fund supports education and the Middletown community.

MIDDLEOAK FAMILY ASSISTANCE FUND (2009) [DA] Established by the MiddleOak Company family of employees for two simple reasons: to give back to others and to lend a helping hand.

MIDDLEOAK SPECIALTY FIELD OF INTEREST FUND (1999) [FI] Promotes safer communities with priority to motor vehicle, marine and personal safety.

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

MIDDLESEX ENHANCEMENT FUND (1997) [UR] This Fund is available to 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 in the county.

THE NEWBERG FAMILY FUND (2009) [DA] Established by Esther Newberg to encourage volunteerism at Middlesex Hospital in honor of Marion, Maurice and Ivan Newberg.

HERB PATTERSON MEMORIAL FUND (2009) [UR] In honor of Herb’s devotion to his community and his determination to support the many organizations working within the county.

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


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


PRESIDENT’S DISCRETIONARY FUND (2008) [UR] 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 response to unforeseen situations and to assist nonprofits when they need it the most.

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

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

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


RUSSELL LIBRARY FUND (2005) [DS] An anonymous donor has established this to-be-named Fund to purchase large print books for Russell Library.

RYAN’S CIRCLE OF GIVING FUND (2008) [DA] 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) [UR] Beth and Gary Salva established this Fund in honor of their marriage and to inspire others to give back to the community.

SAMS FAMILY FUND (2001) [DA] With knowledge of the good works of the Community Foundation, former board member David Sams and his wife Betsy established this Fund to provide continuing support and positive momentum for the future.

SAUNDERS FUND (2003) [UR] 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) [UR] Established by the Shaws to repay their community for the benefits they have derived from it.

ELIZABETH SWAIM ARTS ENRICHMENT FUND (2000) [DS] A major bequest began this Fund that provides grants to enrich minds and expand the horizons of Middletown K–12 public school students with arts programming.

ELIZABETH SWAIM MIDDLESEX COUNTY HISTORICAL SOCIETY FUND (2000) [DS] A bequest established this Fund to support the Middlesex County Historical Society.

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

TRI-TOWN YOUTH SERVICES FUND (2001) [DS] Established by the Whelen family to support positive youth activities in the area and to encourage others to add to the Fund, which they may do at anytime, this fund supports Tri-Town Youth Services Bureau.

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

KENT S. WARNER MEMORIAL FUND (2002) [DA] 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.

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

WESLEYAN UNIVERSITY COMMUNITY FUND (2002) [DA] This Fund is just one of Wesleyan’s tangible commitments to its community.

CHUCK AND RACHEL WILTSIE FUND (2001) [FI] Supports basic human needs and programs for the less fortunate.
FUND FOR WOMEN AND GIRLS (2002) [FI] Established by Founding Donors and many others to empower women and girls to be self-reliant and reach their potential.

JAN ELLEN YOUNGBLOOD FUND (2004) [UR] Established in 2003 to provide unrestricted support for our community now and forever.

AGENCY ENDOWMENT FUNDS
These funds are created by the nonprofits themselves to produce a revenue stream for long-term financial health and stability.

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 AGENCY 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) Recognizing 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.

OPERATING ENDOWMENT FUNDS
These funds advance the work of the Community Foundation.

Patti Anne Vassia Fund for Administration (2007) [DS]
To honor Patti Anne Vassia, former President of Middlesex County Community Foundation, and her work on behalf of many nonprofits and her commitment to operations, the Board of Directors established an operations endowment Fund to support MCCF – now and in the future – in its day to day work of helping Good People Do Great Things.
Planned Gifts Secure Our Future

4 thoughtful donors have notified the Foundation of adding the Community Foundation to their estate plans this year. This brings our total known planned gifts to over $13.5 million from 63 individuals.

Anonymous (8)
Jeannette Archer-Simon and Robert E. Simon
Ronald S. Ashworth
Bonnie Bennet
Marcia W. Bromberg
Harry Eben Burr
Tim Cahill
Jean H. Caron
Richard Caron
Bill and Helen Chatman #
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 Lemonte
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
Gary and Beth Salva #
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 2010
* Bequest received/announced

2010 Investments and Performance

Foundation investments are determined and monitored by the Finance and 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.

*This report is unaudited. The Community Foundation's financial results are audited annually. Audited financial reports and Internal Revenue Service form 990 are available upon request.

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**FINANCIAL REPORTS 2009-2010**

### STATEMENT OF FINANCIAL POSITION

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash &amp; Investments</td>
<td>$5,882,776</td>
<td>$5,112,436</td>
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<tr>
<td>Contributions Receivable</td>
<td>360,480</td>
<td>96,090</td>
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<tr>
<td>Split-Interest Agreements</td>
<td>70,894</td>
<td>58,775</td>
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<tr>
<td>Other Assets</td>
<td>3,070</td>
<td>5,190</td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$6,317,220</td>
<td>$5,272,500</td>
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</tbody>
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### LIABILITIES & NET ASSETS

#### LIABILITIES

- Agency Endowments $441,824 $389,092
- Grants Payable 192,945 176,854
- Split-Interest Agreements 12,015 13,725
- Expenses Payable 11,023 20,094

**TOTAL LIABILITIES** $657,807 $600,365

#### NET ASSETS

**Unrestricted Net Assets**

- Endowment Donor Designated $893,077 $853,523
- Donor Advised 303,398 217,218
- Undesignated Endowment 3,404,876 2,762,579
- Total Endowment $4,601,351 $3,833,320

- Administration & Other 998,159 786,190
- Total Unrestricted Assets $5,599,510 $4,619,510
- Temporarily Restricted Net Assets 59,903 52,625
- Total Net Assets $5,659,413 $4,672,135

**TOTAL LIABILITIES & NET ASSETS** $6,317,220 $5,272,500

### STATEMENT OF ACTIVITIES

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUE</strong></td>
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<td></td>
</tr>
<tr>
<td>Gifts &amp; Contributions</td>
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<td></td>
</tr>
<tr>
<td>Endowed</td>
<td>$466,761</td>
<td>$626,277</td>
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<tr>
<td>Unendowed</td>
<td>475,310</td>
<td>216,265</td>
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<tr>
<td>Administration</td>
<td>205,926</td>
<td>202,649</td>
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<tr>
<td>Split-Interest Agreements</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Inkind Contributions</td>
<td>30,227</td>
<td>38,675</td>
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<tr>
<td>Total Gifts &amp; Contributions</td>
<td>$1,178,224</td>
<td>$1,083,864</td>
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</table>

- Investment Income 99,380 71,995
- Net Realized Gains (Loss) - 32,668
- Fees - Agency Endowments 7,712 6,711

**TOTAL REVENUE** $1,317,984 $1,162,568

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXPENSE</strong></td>
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</tr>
<tr>
<td>Grants - Unendowed funds</td>
<td>$281,342</td>
<td>$196,876</td>
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<tr>
<td>Grants - Endowed funds</td>
<td>67,553</td>
<td>36,330</td>
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<tr>
<td>Functional Expenses:</td>
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<tr>
<td>Program Services</td>
<td>117,462</td>
<td>$138,889</td>
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<tr>
<td>Management &amp; General</td>
<td>145,448</td>
<td>133,658</td>
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<tr>
<td>Fundraising</td>
<td>97,390</td>
<td>77,510</td>
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<tr>
<td><strong>TOTAL EXPENSE</strong></td>
<td>$709,395</td>
<td>$583,263</td>
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</table>

**Unrealized (Loss) Gain** 378,689 691,295

**DECREASE IN NET ASSETS** $987,278 $1,270,600

Net Assets at beginning of year 4,672,135 3,401,535

Net Assets at end of year $5,659,413 $4,672,135

**Planned Gifts** (Approximate Known Revocable Gifts) $13,500,000 $13,300,000
## Operations Donors

### Sustainers are Major Donors Who Have Generously Supported the Community Foundation Over Time

<table>
<thead>
<tr>
<th>Sustainers</th>
<th>The Kitchings Family</th>
<th>David and Barbara Preston</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aetna Foundation, Inc.</td>
<td>Liberty Bank / Liberty Bank Foundation</td>
<td>Sonny and Jessica Whelen/Whelen Engineering, Inc.</td>
</tr>
<tr>
<td>Sharon and Herbert T. Clark III</td>
<td>MiddleOak Specialty</td>
<td></td>
</tr>
<tr>
<td>Clark Group</td>
<td>Middlesex Hospital</td>
<td></td>
</tr>
<tr>
<td>E.S.T. Trust</td>
<td>Pratt &amp; Whitney</td>
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</tr>
<tr>
<td>Essex Savings Bank / Essex Financial Services</td>
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</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Members</th>
<th>Contributions</th>
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</thead>
<tbody>
<tr>
<td>William and Helen Chatman</td>
<td>Marcia and David Kalayjian</td>
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<tr>
<td>Clark Group</td>
<td>Joyce and Robert L. Kirkpatrick, Jr.</td>
</tr>
<tr>
<td>Cynthia and Randall Clegg</td>
<td>The Kitchings Family</td>
</tr>
<tr>
<td>DEMCO, LLC</td>
<td>George and Sarah Mayer</td>
</tr>
<tr>
<td>Direct Energy</td>
<td>MiddleOak Specialty</td>
</tr>
<tr>
<td>The Director Family</td>
<td>Deborah and Roy Moore</td>
</tr>
<tr>
<td>Nancy Fischbach and Martin Wolman</td>
<td>Jacqueline Hubbard and Norman Needleman</td>
</tr>
<tr>
<td>Susan and William Gillespie</td>
<td>James and Lynn O’Halloran</td>
</tr>
<tr>
<td>Sharon and William Griffin</td>
<td>Ellen Patterson</td>
</tr>
<tr>
<td>Lee and Welles Guilmarin</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Members</th>
<th>Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Janice and Tip Atkeson</td>
<td>Durham Manufacturing Company</td>
</tr>
<tr>
<td>Elaine and Stephen Bank</td>
<td>Essex Financial Services</td>
</tr>
<tr>
<td>Susan G. Barrett</td>
<td>Essex Savings Bank</td>
</tr>
<tr>
<td>Bonnie and John Bennet</td>
<td>George C. Field Company</td>
</tr>
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<td>John Bidddiscombe and Gail Gorton</td>
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### Special Thanks to our Morning Musing Presenters

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### The Fund for Women and Girls Appreciates the Support of so many for “An Evening with Arianna Huffington”, Especially:

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LEAVE A LEGACY of CONNECTICUT

MIDDLESSEX COUNTY COMMUNITY FOUNDATION

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 insure 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.

Source: LEAVE A LEGACY of CONNECTICUT
November 3, 2010, will always be an outstanding evening in the memories of the friends and supporters of the MCCF Fund for Women & Girls. Joined by over 200 friends, new and old, men and women, the Committee welcomed Arianna Huffington, political commentator, activist, author and co-founder of HuffingtonPost.com, to Middlesex County.

Ms. Huffington spoke of the importance of supporting our communities and stressed that individuals and communities such as those in Middlesex County are the backbone of our country. She encouraged the audience to look beyond politics and to search deep within our own personal compassions and beliefs to bring about change. She captivated the audience with humorous anecdotes and serious examples to illustrate that even in the most desperate of circumstances, great work can, and must, be accomplished.

Ms. Huffington encouraged everyone to “look in the mirror and see a leader.” Referring to her newest book, Third World America often throughout the evening, she remarked at one point, “If you’re too busy to read the whole book, just read section 5, Solutions. See? I’m giving you the Cliff Notes.” Ms. Huffington talked about solutions, and not just in theory. She is direct and thoughtful, considering the hurdles and the possibilities that our communities, both small and large, are facing after the economic crisis. She encouraged the audience to follow the advice of her mother and “recognize our bounty.”

Following her speech Ms. Huffington chatted with audience members and signed copies of her newest book, Third World America.

The evening ended on a truly impressive note with the announcement that Ms. Huffington had donated her honorarium to MCCF Fund for Women & Girls for grant making in 2010-2011.

Thank you to ARIANNA HUFFINGTON … and thank you to all of YOU who joined us for a great evening.

MCCF Fund for Women & Girls Committee Chair Maria Holzberg, Arianna Huffington, Event Chair Jessica Carso, Thayer Talbott

OF NOTE

Middlesex County Community Foundation was honored to accept on behalf of all in Middlesex County two prestigious awards: the Association of Fundraising Professionals’ Connecticut Foundation of the Year Award and the Connecticut Rivers Council Boy Scouts of America Community Service Award. We were humbled to be selected by these outstanding organizations to represent the collective good works of all in Middlesex County.