Seeds planted by visionaries, nurtured by community leaders and carefully tended by volunteers.
Dear Friends,

Life seems to be moving at a much faster pace lately. It can be hectic, complex, exciting – and never boring. Life in Middlesex County over the past 15 plus years has been all that and more. Certainly change has been the rule, yet there has been one amazing constant throughout - YOU - our friends, supporters and investors. YOU, working with and through the Community Foundation of Middlesex County, have made a powerful difference – and each and every day you continue to do just that. YOU continue to be GOOD PEOPLE DOING GREAT THINGS.

2012 and the first months of 2013 have been incredible because you have made it abundantly clear that PHILANTHROPY is alive and well in the fifteen (15) towns of Middlesex County. Since our modest beginnings in 1997, the Community Foundation’s friends, investors and leadership volunteers have worked to improve the quality of life for all in our region. Just look at what we’ve accomplished - TOGETHER:

• In 2012, you invested a record (and humbling) amount in new gifts and pledges as we embarked on our “Grow the Foundation” initiative under the guidance and superb leadership of chairwoman Marcia Kalayjian and the Board of Directors. As of today, that initiative has generated over $3.8 million in gifts, pledges, and planned gifts for the benefit of all in Middlesex County. We extend a heartfelt “THANK YOU” to all who contributed so generously.

• You and your colleagues established 16 new funds in 2012– each as unique as the individual investor – benefiting our friends and neighbors now and well into the future. This brings our total funds to 146.

• A record $537,000 was invested in the community in 2012 through grants to nonprofits. Those grant awards, combined with additional grants in the first six months of 2013, bring the total investment in our region to almost $3 million.

• We welcomed 440 new investors, friends and colleagues who join you in improving the quality of life for all in Middlesex County. You all demonstrate by your generous gifts that PHILANTHROPY MATTERS...PHILANTHROPY WORKS.

AND THERE’S EVEN MORE:
• We changed our name.
• We updated our logo and brand.
• We rolled out a new website and video.

An exciting time, indeed!

At the Community Foundation of Middlesex County we consider ourselves very fortunate not only to have you as our PARTNERS IN PHILANTHROPY, but also to have dynamic leaders who strive for excellence in everything they do. Our Board of Directors was pleased to welcome Marc Levin of Haddam and Anna Wasescha of Middletown to the Board. Anna and Marc bring a wealth of knowledge about our community and a passion to help others. We bid “Adieu” to Janice Atkeson of Essex as she completed her term on the Board. We thank her for her guidance and wisdom and are fortunate that she has agreed to continue to lend her talents to various CFMC endeavors.

Of course, we acknowledge and thank the many contributions of our strong and able staff and our numerous, energetic volunteers who add to our ability to “help good people do great things”.

We continue our efforts going forward and thank the entire Board of Directors for their enthusiastic work on behalf of all in Middlesex County. We welcome our new chairman, John Biddiscombe, and expect that his extraordinary talents and expertise will lead us to do even more great things for our region.

We close by asking you to remember…”Behind every dollar invested in the community through the Community Foundation, there’s the heart of a neighbor or friend who believes that by working through the Community Foundation good things will happen, lives will be changed and the community will be a better place to live, work and play.”

Sincerely,

Marcia L. Kalayjian               Cynthia H. Clegg
Chairman, Board of Directors 2012  President & CEO

P. S. This report is late and we apologize. The Community Foundation extends its thanks to you for your patience and to our sponsor, Pratt & Whitney, for its understanding.
THANK YOU!
We wish to acknowledge and thank Pratt & Whitney for their generous support. Committed to the community in which it calls home, Pratt & Whitney exemplifies Philanthropy Matters. Philanthropy Works. Thanks to Pratt & Whitney’s support, CFMC is able to share stories and photos of the generous individuals and invaluable nonprofit organizations that make Middlesex County a great place to live, work, and play.

THANK YOU FOR BUILDING A LEGACY of GENEROSITY

GROWTH
907 grants awarded totaling over $2.8 million to nonprofit organizations. Over $8.6 million in pooled assets.

PARTNERSHIPS
GRANTMAKING PARTNERSHIPS with Connecticut Humanities Council, River View Cemetery, Ann T. D’Addario Family Foundation and Citizens Bank Foundation have provided $654,000 and The Connecticut Health and Educational Facilities Authority (CHEFA) partnership has brought an additional $407,373 for a total of almost $970,000 for local nonprofits.

COMMUNITY PARTNERSHIPS with Liberty Bank Foundation, Citizens Bank, Guilford Bank, Middlesex Community College, Middlesex United Way and Wesleyan University have provided support and training to enhance the nonprofit sector.

COMMITMENT
Almost 3,000 INDIVIDUAL and CORPORATE DONORS have provided more than $13 million in gifts to support and encourage our mission. 100% COMMITMENT and 100% PARTICIPATION in donations from current and past BOARD of DIRECTORS MEMBERS.

INTEGRITY
In 2005 Fourth community foundation in Connecticut to meet new National Standards for U. S. Community Foundations; Affirmed as continuing to meet National Standards in the 2012 reconfirmation process.

TRUST
ORGANIZATIONAL ENDOWMENT FUNDS have been established by FIVE nonprofit organizations to help secure their future.

One Hundred Forty-Six FUNDS have been established by generous individuals, companies and institutions to build a better Middlesex County.

LEGACY
Seventy-four individuals have made known their PLANNED GIFTS with a value of over $13.6 MILLION.

The CENTER FOR NONPROFIT EXCELLENCE, with the support of Liberty Bank Foundation, opened in March 2008. Over 1,800 nonprofit staff and board members have attended free monthly training sessions, webinars and half-day workshops designed to improve professional skills and help organizations build capacity.
You have
made an investment in
Middlesex County – for 15 years
you have Done More, Given More, Helped More in our community.

The Board of Directors, 15th Anniversary Committee, and
staff of the Community Foundation of Middlesex County
extend a heartfelt THANK YOU to everyone who made our
anniversary celebration and the last fifteen years truly a time
to remember. We are grateful for the generous support of
our sponsors, patrons, benefactors, and friends – you
are all “Good People Doing Great Things
for Middlesex County.”
You Are Transforming Middlesex County

Donors Transform Our Community

The Community Foundation is Community Philanthropy. Philanthropy – Pure and Simple. Donors have many passions, many perspectives, and many reasons to give. Yet, the one thing they have in common is working through the Community Foundation to make life in Middlesex County better for the whole community.

Perhaps you want to provide someone else with an opportunity you enjoyed, or preserve a piece of the community you love. Perhaps you are just beginning to explore your charitable purposes and want to join with others to create impact. Whatever your charitable interest, when you establish a Fund or join a Giving Circle at the Community Foundation of Middlesex County, you make a good deed better. Our donors become part of something bigger than their individual acts of charity – they become philanthropists.

2012 was an incredible year for Middlesex County and the Community Foundation, full of celebrations, new goals and new accomplishments. It was also a year of family, a year of community, a year marked by legacies – all making a difference in our lives today … and building toward a stronger future for generations to come. This year, generous donors created sixteen (16) new funds at the Community Foundation for sixteen (16) 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.

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.

Types of Funds

Anyone can be a Philanthropist. There are many ways to give to the community in which we live, we work, we 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. The Community Foundation provides guidance, administrative support and information if donors wish.

Endowed Funds

- Unrestricted Funds [UR] Think Broadly
  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] Provide On-going Support
  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] Stay Involved
  These funds allow individuals, families, or businesses to recommend where the fund's dollars might do the most good, year in and year out.

Field of Interest Funds [FI] Address Issues

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.

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.

Fiscal Sponsor/Designated Funds [FS/D] These funds are established for finite periods of time and help good people to do good things. The Community Foundation acts as an incubator, providing assistance, knowledge, and resources while groups and organizations complete the process of incorporation and tax-exempt status.

Project Funds [PF] Special Project Funds are established on a short-term basis to meet a specific charitable purpose. These funds are not endowed and are intended to operate within a given, finite time period. They may be established for a variety of reasons to fulfill a particular goal, such as building a community recreational park; to support a specific initiative, such as a research project; or to assist the charitable efforts of a particular group of people.
15th Anniversary Endowed Fund for Operations (2012) [DS]

15 years of impacting lives
15 years of galvanizing resources to solve problems in our community
15 years of improving the quality of life for all in our region
15 years of great accomplishments
15 years of Community Philanthropy – Pure and Simple

Yet it doesn’t stop there. The needs and dreams of our community continue to grow and change. The Community Foundation is committed to DO MORE, GIVE MORE, HELP MORE.

The Board of Directors recognizes that a Community Foundation requires a strong foundation of resources and human capital to do its work. The Board gives generously of their time, their expertise, and their attention to ensure the Community Foundation serves the needs of Middlesex County.

In an effort to continue building for the Community Foundation’s future, the Board established the 15th Anniversary Endowed Fund for Operations and challenged friends, colleagues and businesses to show that “Philanthropy Matters and Philanthropy Works.” This permanent fund will provide annual support to operations and enable the Community Foundation staff to continue developing and offering comprehensive services to donors and nonprofit organizations throughout Middlesex County. Ensuring a healthy today and securing a bright future for Middlesex County is a cornerstone of the Community Foundation’s work. Thanks to the leadership and vision of the Board of Directors, the 15th Anniversary Endowed Fund will help to ensure the Community Foundation can continue “Helping Good People Do Great Things.”

Colter Abely Achievement Funds (Endowed and Unendowed) (2012) [DS]

A great attitude. A friend to everyone. An infectious smile. An excellent athlete whose passion was wrestling. A mentor and leader to those around him. These are just a few of the things people knew and admired about Colter Abely. Colter grew up in Middletown and graduated from Xavier High School. Unfortunately tragedy struck in August 2012 when Colter was killed in an automobile accident on the Massachusetts Turnpike. While life for his family and friends changed in an instant, Colter’s influence on others has continued.

Colter’s parents, Brian and Chaleen, wanted to find a way to honor their son’s life and support the community he deeply cared for – now and forever. Working with their attorney, Edward Lang, Brian and Chaleen were introduced to the Community Foundation of Middlesex County and realized there were many ways to carry on Colter’s legacy. The Abelys established the Colter Abely Achievement Fund to support the wrestling programs at Middletown and Xavier High Schools.

Because Colter’s passion for wrestling went beyond the competition and matches to supporting his teammates and the Xavier program which meant so much to him, the Fund’s goal is to enhance and supplement the efforts of the wrestlers and coaches. The Fund will also present an educational assistance award to a wrestler at each school to further his studies at a college or community college.

Colter’s legacy – mentoring, friendship, teamwork – will continue through Colter’s Fund, and Colter’s life lessons will continue at Middletown High School and Xavier High School for years to come.

“We knew we wanted to do something. We knew we wanted to continue the positive impact Colter had on so many kids. We just didn’t know how to do that. Ed Lang listened to what we wanted and immediately connected us with the Community Foundation. He reassured us that this organization would understand what we wanted to do, the legacy we wanted to create, and help us do so much for the people and the school Colter loved so deeply.”

— Brian and Chaleen Abely

Establishing a Legacy of Opportunities

The Richard Anselmi Endowed Funds (2012) [DS]

Richard Anselmi was Mr. Deep River. He loved the community and knew just about everyone by name. Walking through town was one of his favorite pastimes and everyone looked forward to Richard’s daily trips up one side of Main Street and down the other.

Richard had Asperger’s Syndrome and although that made physical contact impossible, he always had a greeting and a ready smile for everyone he met. Richard didn’t let his disabilities - hearing deficit and poor eye sight - keep him from sharing his enthusiasm for life or keep him from enjoying the rewards of working. Richard was proudly employed by White Way Laundry, UARCCO, Pratt Read, and Roto Frank of America. Richard fully understood that disabilities did not have to prevent anyone from having a well-rounded, fulfilling life. He also believed that everyone deserves an opportunity.

Richard passed away in 2011, but his legacy lives on. His dear friend, Lucille Perkins, worked with the Community Foundation of Middlesex County to establish two funds to honor the memory of Richard Anselmi.

Richard’s impact on his community. The funds will continue his desire to help young people with developmental disabilities enjoy all life has to offer.
The Richard Anselmi Education Fund offers a senior with learning and other development disabilities, graduating from Valley Regional High School (VRHS), with an education award for his or her post secondary education.
The Richard Anselmi Tri-Town Youth Services Bureau (TTYSB) Fund offers a child with developmental disabilities the opportunity to participate in any and all programs offered by TTYSB.
Richard was very sensitive, caring, and determined to make a difference in any way that he could. The impact his legacy will have each year on children’s lives will be immeasurable. The Community Foundation is honored to be a part of Richard’s legacy. Mr. Deep River…a trusted friend honored and remembered - now and well into the future.

A Simple Gift Benefits Many

Chris Belfoure Memorial Funds (Endowed and Unendowed) (2012) [DA]
Christopher R. Belfoure was just 24 when he tragically died in 2011. Yet his passions - his belief in the global community, his dedication to teaching and to the environment – will be shared through the Chris Belfoure Memorial Fund at the Community Foundation of Middlesex County.
A graduate of Valley Regional High School and West Virginia University, Chris spoke fluent Mandarin and was pursuing a career as a corporate trainer in Shanghai.
He is remembered as a charming, intelligent, ambitious man with a zest for life and adventure. Chris believed knowledge to be a bridge between cultures. He loved to talk and realized that by overcoming the barriers of language, people had numerous opportunities to learn about each other, to share hopes and dreams, and see themselves as members of a global community … and that good people would do even more good things – together.

Chris’ mom and step-father, Robin and George Chapin, established the Chris Belfoure Memorial Fund to support Middlesex County-Lower County public schools and public library programs focused on integrating multicultural experiences, learning foreign languages, and environmental programs into the curricula.

“Keeping Chris’ dreams alive are so important to us. Chris was passionate about life, and I want to share his passion and determination with others so they can grow and enhance their lives. He was always smiling and inspiring others to pursue their dreams. The Fund allows us to provide opportunities for schools and libraries to fund their foreign language programs and global education programs. Giving back to the community was a part of who Chris was. This all helps to keep his memory alive.”
- Robin Chapin, mother of Chris, Ivoryton

Doing All the Good Possible

Capece Family Fund (2012) [UN]

When asked why work through the Community Foundation,’ Vin and Tina Capece will tell you that it is important to support the community in which you live, work, and play. The needs of the community today will not be the same tomorrow; providing for the future is as important to them as supporting worthy organizations today.

“The Community Foundation is a great mechanism to make that ‘support’ happen. We wanted to be sure the Community Foundation has the resources – today and in the future – to do all the good possible in our community,” explained Vin Capece.

Change is a constant and the Capece family understands that. By establishing an unrestricted fund at the Community Foundation, they have assured that those changing needs will always be met. Thanks to the Capece Family Fund, in conjunction with many other funds, at the Community Foundation, the present and future needs of Middlesex County will be met and directed to the areas of greatest impact.

Investing in Positive Change

Clegg Family Fund for Operations (2012) [DS]
Gifts to the Community Foundation reach so many in Middlesex County. A gift may open doors to higher learning for a child; ensure our neighbors have access to free dental care; provide a safe place and a warm meal on a cold winter’s night. A gift to the Community Foundation can bring “Romeo & Juliet” or “Seussical” to life before the wide eyes of an aspiring actor.
Each gift creates a positive change in our community today. Each gift has a face, tells a special story, and is an example of why it is important to join with others to support your community. Each face is a neighbor, a colleague, a friend – someone you know who truly cares about this community.

And through careful stewardship, those gifts grow into vibrant possibilities for tomorrow. It is that desire to keep things moving forward and to have a strong powerful Community Foundation that led Randy and Cynthia Clegg to establish the Clegg Family Fund for Operations. Randy and Cynthia know that to continue creating a positive impact in Middlesex County, the Community Foundation needs the resources and the tools to increase its work. Their fund establishes a legacy for the Community Foundation itself, providing for its development, its growth, and its future.
Responsive Philanthropy at Work

Director Family Unendowed Donor Advised Fund (2012) [DA]

Each and every day unexpected needs arise throughout the Middlesex County community. It may be something small that requires special attention. It may be a larger emergency that brings a community-wide call for help. It may be an opportunity for a special donation “just because” a nonprofit organization is doing a terrific job in fulfilling its mission.

Art Director is well known for his generosity and his belief in the nonprofit organizations serving Middlesex County. So it is no wonder that he approached the Community Foundation to set up a mechanism through which he could be more responsive to the unforeseen opportunities that may arise. Working with the Community Foundation, Art established the Arthur and Edythe Director Family Unendowed Donor Advised Fund.

Art and his family are able to take advantage of the Community Foundation’s knowledge, network, and resources to address an issue or an opportunity as it arises, all while continuing to support the organizations which are closest to their hearts. The Director family believes that “Good People Doing Great Things” is not just a tag line. It is their way of life.

Planning a Lifetime of Giving

Elles and Jones Family Fund (2012) [DA]

The Elles and Jones Family Fund was established by Wally and Jennifer Jones to support and enhance the quality of life for all in Middlesex County. Through their business, WJ Financial Advisors, LLC, Wally and Jennifer emphasize proper stewardship of capital and attention to detail when making investments.

“The more we work with the Community Foundation, the more impressed we are with the depth of knowledge, and diligence in supporting both donors and nonprofits. Establishing a fund is another way for us to demonstrate our confidence in the Community Foundation and to add to the great work that is done in Middlesex County.”

Wally’s first experience with the Community Foundation was as a founding member of the Live Local Give Local 365 Fund. “I had an opportunity to join a small group of people to do something extraordinary, to establish a new way to get involved. I learned so much about nonprofits in Middlesex County and about other people and what drives them,” Wally explained. “My work with the Community Foundation has been a real education regarding the role that local business leaders can play in supporting our communities. Middlesex County has so many great examples of business leaders and entrepreneurs who truly ‘give back’. They set the bar very high and we hope to continue that tradition.”

Wally and Jennifer want to pass along the value of philanthropic giving to their children Abigail and Owen. “Abby approached us after a Sunday school lesson at church regarding giving and was very worried. She said, ‘if we give away all our money, who would help us?’ We realized that educating our kids about our responsibilities as community members needed to start much earlier than we had anticipated.” Working through the Community Foundation, the Jones family looks forward to identifying and supporting organizations demonstrating a meaningful impact in Middlesex County – and passing the benefits of philanthropy to the next generation.

A Lifelong Commitment to Students

Mary C. Rawlins Award Fund (2012) [DS]

You hear it all the time: “Do your homework.” “Stay in school.” Study hard and you’ll be a success.” How often do you actually see someone doing more than offering these platitudes? Well, in Mary Rawlins, many students found their champion.

Mary Rawlins (1929-1995), a founder of the Connecticut Association of Affirmative Action Professionals (now CADEP), was particularly interested in improving educational opportunities for minority students and encouraging them to stay in school. Some twenty years ago, she and her fellow members of CAAAP established an educational grant award to support Connecticut students and encourage them to continue their education. In 2003, recognizing Mary’s years of tireless efforts to serve underserved communities, CADEP honored her by renaming the award she helped establish - the Mary Rawlins Award.

Establishing the Mary C. Rawlins Award Fund at the Community Foundation provides the CADEP members a way to continue Mary’s legacy. The Community Foundation provides the administrative and financial oversight of the fund as well as technical assistance to CADEP members to help grow the fund. The award is given each year to qualifying high school seniors; and CADEP believes that through this fund, Mary’s passion to help students will continue… now and well into the future.
Helping Make a House into a Home
Simply Sharing Fund (2012) [FS/D]

A kitchen table and chairs; beds and sheets; pots, pans and dishes – these are basic household goods many of us take for granted. Yet for individuals and families who have been homeless, these basic necessities are, indeed, luxuries. Simply Sharing’s mission is to provide basic furniture and household goods to individuals and families transitioning from homelessness to sustainable and supportive housing. Simply Sharing works in collaboration with state agencies and Columbus House to identify individuals and families in need. These household items are donated by individuals and businesses. Simply Sharing also receives monetary contributions which help with the purchase of items for the families they serve.

“When someone first moves out of a shelter, the money they’re earning usually doesn’t go very far, and many can’t afford furnishings,” explained Alison Brinkmann, president and founder of Simply Sharing. Alison began her organization to bring these everyday basics to those who are moving from transitional housing and shelters to permanent housing. She is “simply sharing” the treasures of others to help people get a start at building a home.

As Simply Sharing worked to establish itself, the organization turned to the Community Foundation for advice and assistance. The Community Foundation serves as the fiscal sponsor for the organization as it grows, strengthens, and expands its operations. The Community Foundation provides Simply Sharing knowledge, oversight and administrative resources so Alison and her organization can focus on the real need – the people and the things that make a place into a home.

Nurturing the Heart of the Community
Schoonmaker Family Fund (2012) [UN]

A sense of home. That is what Judy and Renny Schoonmaker like most about living in Middlesex County. Avid travelers, they have visited many places and met many people. Yet coming home means more than returning to their house; they return to their friends and neighbors and community they care about. They have seen first-hand how communities grow and flourish because the people living in the communities find ways to work together to make a place great. They have invested their hearts in Middlesex County – through work, friendships and volunteering. As Judy often says, “this is a true community, the best of all worlds, right here in our backyard.” Judy’s work with the Community Foundation over the years led Judy and Renny to establish the Schoonmaker Family Fund, an unrestricted fund that will provide for today, tomorrow and the future. “This is truly one of the best organizations I know. The Community Foundation’s attention to the community, the caring nature, the ability to get to the heart of the matter and bring people together, that is what really impressed us. The Community Foundation treats all organizations as if they were the biggest, brightest and only one out there. Any person can get involved, no matter how much they give or where their interests lie, and they will feel they are really making a difference in their community. The Community Foundation is a springboard for so much good, and we are happy to be a part of that – forever.” The Schoonmaker Family Fund, leveraged with other unrestricted funds, will help a retiree get to a doctor’s appointment; provide a week’s worth of groceries to a family in need; offer a stage and audience to a budding actor; introduce a child to the wonders of the natural world; and so much more. They say “home is where the heart is.” Judy and Renny Schoonmaker’s hearts are in Middlesex County. The legacy they have established ensures Middlesex County is the best home for everyone, today and forever.

Establishing a Positive Educational Foundation
William and Mary Tomc Memorial Fund (2012) [DS]

Like so many of their generation, Rich Tomc’s parents were born to immigrants. They were raised in a close-knit, working class neighborhood. The parish church was the heart of the community and their community recognized the importance of family, hard work, and education. Rich and his siblings were raised in a strong family with a deep religious faith and a profound belief that education was the gateway to endless opportunities. Rich and his wife Joan carried that tradition with them. They found a strong community in Middletown and a positive educational grounding for their daughters, Jamie and Dana, at Mercy High School.

To honor his parents’ commitment to family and the opportunities afforded their daughters at Mercy High School, Rich and Joan established the William and Mary Tomc Memorial Fund at the Community Foundation. Establishing the Fund was a family decision. Rich and Joan wanted to give back in a way that allowed their daughters to participate in the whole process, from the idea to the implementation of the fund to the choice of the organization. The Fund supports a tuition assistance award for an incoming fresh-woman at Mercy High School which will renew annually to support her education each year for four years.

“My parents taught us many life lessons—close family ties, the value of education, saving for the future—but perhaps the most enduring is to be generous and to give help where help is needed. The Memorial Fund established in my parents’ honor anchors that value in our community. By providing continuity, structure and the assistance of a dedicated staff, the Community Foundation ensures that the Fund will carry my parents’ legacy far into the future.”
- Rich Tomc

The Tomc Family
Helping Good Grow
Whelen Family Endowed Fund (2012) [UR]
The Whelen family is well-known for its commitment to the Middlesex County community and is evident in many programs through many organizations. They embody the idea of community philanthropy, of a group of individuals and businesses working together to impact the community in a very positive way from helping children to grow and thrive to supplying nutritious food to families in need to encouraging young artists and so much more.

As early supporters of the Community Foundation, the Whelen family has seen firsthand the Community Foundation’s ability to address the changing needs of Middlesex County. As part of CFMC’s 15th Anniversary “Grow the Foundation” campaign, they established the Whelen Family Endowed Fund, an unrestricted fund which will work with other funds to provide much-needed support for nonprofits now and long into the future.

“The Community Foundation is in constant communication with nonprofits working in our community. They have an incredible network in which they work, allowing them to gather knowledge, assess issues and needs, and understand how best to address them. This fund will help provide the resources necessary to meet those needs, not only now, but for years to come.”

- Sonny Whelen

Your Investment Creates Great Things in Middlesex County

Representatives of Cystic Fibrosis Foundation, The Yale Cancer Center, Trinity College, and Kingswood-Oxford School joined Phyllis and Barry Gordon to celebrate the legacy established through Ryan’s Circle of Giving.

Middletown Public School fifth grades enjoyed Salt Marsh Opera’s La Cenerentola (Cinderella) at the Middletown High School Fine Arts Auditorium

Community members gather to cut the ribbon on the new Essex community gateway project

Members of Epoch Arts’ “Breaking Silences Program” with the Sari A. Rosenbaum Fund for Women & Girls Committee

Chester Historical Society’s “Over The River & Through The Woods: A Century of Transportation in Chester”

The Griffin Family Fund at CFMC partnered with the Peach Pit Foundation to ensure homeowners in Middlesex County have “A Brush With Kindness”
Making an impact; supporting programs and services today; building a strong and vibrant future for Middlesex County – all of this is grant making. Our donors have passions, hopes, and aspirations for their community, and we work with them in numerous ways to make Middlesex County the best place to live, work, and play.

Thanks to the generosity of our donors, we are able to offer a competitive grant cycle annually. The Funds supporting the competitive cycle have been established by donors who recognize that the Community Foundation looks for grants that add value to, and have a positive impact on, the health and vitality of the Middlesex County Community.

Each July, the Community Foundation welcomes grant applications from any nonprofit organization serving the towns of Middlesex County. Grants are made in several focus areas including arts and culture, education, heritage enhancement, the environment, health and human services, and programs serving women and girls.

The grant awards address a need within one of the focus areas and grant applications demonstrate how the award will impact the organization, project, community or persons served. The Community Foundation seeks applications for projects that possess some of the following elements: 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; foster cooperative approaches to community issues through collaboration; serve as a catalyst for attracting other resources, such as matching gifts; and build infrastructure within the organization in order to meet its mission.

Organizations awarded grants are expected to incorporate a media relations outreach program to provide visibility for both the recipient organization and the Community Foundation. Final evaluations are required that measure goals, objectives and outcomes and are 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.

Normally the Community Foundation does not award grants to build endowments, for capital campaigns and other building programs, sponsorships, debt reduction, lobbying, political organizations and campaigns, or individuals.

CFMC’s Council of Business Partners Stands Up to Bullying
CFMC’s Council of Business Partners funded Snow Angel, a production by Oddfellows Playhouse Junior Repertory Company in partnership with Rushford, a Hartford Healthcare Division. Snow Angel tackles themes of bullying and the struggle behind young people’s interpersonal relationships. The Playhouse and Junior Repertory tackled the themes right from the beginning of the rehearsal process. Rushford staff led conversations with the students early on, focused on their own personal experiences with “bullying” and how to bring those experiences, similar or different, to the life of the characters they were creating. The Council of Business Partners is committed to finding innovative ways to help youth in our communities create safe, healthy schools and programs through the implementation of the “No Bully Zone” program.

Live Local Give Local 365 Giving Circle helped local children make new friends and enjoy new adventures at Bushy Hill Nature Center summer camps.
Your Investments Create a Stronger Community

“By working together, pooling our resources and building on our strengths, we can accomplish great things.”

–Ronald Reagan

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. Your commitment to your community resulted in a landmark achievement in 2012 – the Board of Directors approved 150 grants totaling $537,164.11.

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!

2012-2013 COMPETITIVE GRANT AWARDS
TOTAL AWARDED: $120,800

Grants for Animal / Human Welfare
High Hopes Therapeutic Riding / $3,000 / provide assistance to children with disabilities from Killingworth Elementary and Haddam-Killingworth Middle Schools.

Grants for the Arts
Community Music School / $3,000 / to support individual and group music therapy sessions.
Greater Middletown Chorale / $5,000 / fund portions of the three parts of “Letter from Italy”.
NEAR, Inc. / The Buttonwood Tree / $3,500 / to fund technological improvements which will increase the quality of art exhibits and performance and patron comfort.
Salt Marsh Opera / $5,000 / to support a program for more than 700 5th and 6th grade students in the Middletown schools, culminating in a live operatic performance at the MHS Fine Arts Theatre.

GRANTS FOR EDUCATION
Bushy Hill Nature Center / $2,500 / partially fund materials for a new classroom space in the Nature Center.
Greater Middletown Chorale / $5,000 / to create a dynamic and interactive museum exhibit - suited to all ages - on early transportation in Chester, a typical river town of Middlesex County.

Durham Middlefield Youth and Family Services / $2,100 / to train students as peer mediators; referrals will be made by trained youth-serving community agency personnel and self-referral. Sessions will be supervised and evaluated.
Durham Public Library / $2,000 / partially fund the expansion of the picture book collection and renovation of the book/play area to better support the developmental needs of preschoolers.
Essex Land Trust / $3,500 / the culmination of a three year project about the Thatchbed ospreys and their nesting cycles, resulting in the publication of a book and DVD.
Henry Carter Hull Library / $5,000 / partially fund technology and materials, renovate the research area, and provide staff support for individuals requiring computer and job seeking instruction.
Mount Saint John / $2,500 / to support the purchase of supplies for the Vocational Enrichment After-School Programs during the spring 2013 session.
Ryan Woods Autism Foundation Center, Inc. / $2,500 / to purchase learning center equipment for teens and young adults on the autism spectrum and other related disabilities for the after-school program.

GRANTS FOR THE ENVIRONMENT
Connecticut Land Conservation Council / $1,500 / to support two regional roundtables: (1) Regional Directors’ Summit for land trusts located in Middlesex and adjacent counties; and (2) Roundtable discussion on Permanent Land Protection Issues (“Land Protection Roundtable”).
Mattabeseck Audubon Society / $2,800 / to provide interactive field trips for area school children to connect them with local ecosystems while focusing on state mandated science and social studies curriculum.

GRANTS FOR HERITAGE ENHANCEMENT
Chester Historical Society / $4,655 / to create a dynamic and interactive museum exhibit - suited to all ages - on early transportation in Chester, a typical river town of Middlesex County.
Connecticut River Museum / $5,000 / to improve heritage programming for individual and group audiences through new technology and printed materials.
Essex Historical Society / $6,500 / to support in part the general costs of maintenance to the barn and other outbuildings associated with the Pratt House.

GRANTS FOR HUMAN SERVICES
Adelbrook Behavioral and Development Services / $4,350 / to fund parent education and training for families with children living at Adelbrook.

Columbus House, Inc / $3,000 / general operating support for the Middlesex Family Shelter Program, which provides emergency shelter for families with no other housing options.

Common Good Gardens, Inc. / $3,000 / partially fund the general operating costs of the garden, including seeds, seedlings, plants, irrigation, soil amendments, fertilizers, fencing, tools, and structural support.

Kiwanis Foundation of Middletown, Inc. / $2,500 / provide new basic winter clothing and footwear for upper Middlesex County children, birth through age 15, who might otherwise go without during the winter of 2013-2014.

MARC Community Resources / $5,000 / to partially fund the Adult Skill Development and Leisure Program, opportunities for improved quality of life by teaching and promoting health and safety, personal growth, and wellness for adults with intellectual disabilities.

Mercy Housing and Shelter Corporation / $5,000 / to support the operations of Shepherd Home Transitional Housing Program, providing housing and supportive case management services to homeless people in Middlesex County.

Middlesex Coalition for Children / $5,000 / to establish a staff position to further the community planning, public and legislative advocacy, agency coordination and community mobilization efforts of the Coalition to improve outcomes for children prenatal to age 18 in Middlesex County.

Middlesex County Coalition on Housing and Homelessness / $5,000 / to build the capacity of MCCHH with support for staffing for the management and implementation of Middlesex County’s Ten Year Plan to End Homelessness.

Middlesex Habitat for Humanity of Connecticut / $5,000 / to support the “A Brush with Kindness (ABWK)” Program, helping homeowners, meeting Habitat qualifications to complete the essential repairs to their homes to maintain them as a safe and decent places to live.

Middlesex Hospital, Family Advocacy Program / $5,000 / to support the Opportunity Knocks program, ensuring parents/caregivers of young children build a self-sustaining community that supports healthy living, better nutrition and higher levels of physical activity.

Sail Connecticut Access Program / $5,000 / to support general operating and capacity building costs, including maintenance and gear, staffing, and program marketing.

GRANTS FOR WOMEN & GIRLS
Woodrow Wilson Middle School (Middletown Public Schools) / $1,995 / to support the “Girls’ Night Out-Growing Together” program, designed to provide goal setting projects and personal time for women and girls.

Rushford Center / $2,000 / to fund “Girl Talk,” a four week summer camp offered to 20 middle school age girls from Middletown. Rushford Prevention Professionals facilitate sessions focusing on teaching adolescents the skills needed to being healthy, being positive role models, understanding and evaluating media messages.

Russell Library / $1,500 / Update and expand the “Parenting Bags” program, materials such as books and DVDs are coordinated in bags which are available to mothers/parents/caregivers and can be checked out on a short term basis.

YMCA of Northern Middlesex County / $2,500 / to fund the “Girls Outside and Women too” program, enabling girls and women to spend time outside in nature and develop skills, knowledge and confidence.

THE 15TH ANNIVERSARY ENDOWED UNRESTRICTED FUND (2011) [UR] 15 TOWNS – 1 County. 15 Years – 1 Community Foundation. Together Helping Good People Do great Things. Marking CFMC’s anniversary, this unrestricted fund will provide the Community Foundation the ability to respond to issues and needs within our communities for years to come.

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.

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


BEE & MISSIONARY SOCIETY OF FIRST CONGREGATIONAL CHURCH OF MIDDLETOWN FUND (2003) [UR] Continues its 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.

BOTANICAL BEAUTIFICATION (ANONYMOUS) FUND (2002) [FI] Support Middlesex County botanical beautification and enhancement of the environment through horticulture and forestry.

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


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

LEE AND WELLES GUILMARTIN FUND (2002) [UR]

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

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] Established to honor the many contributions and service to others provided by the Reverend Mary Klaaren.

MARY ANN LAMBERT RANDOM ACTS OF KINDNESS FUND (2010) [UR] Her friends and colleagues established this unrestricted Fund to honor her caring ways.

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. It is our responsibility to give back and show good stewardship. 100% of gifts to this Fund are granted to local nonprofits each year.

LOFFREDO PERFORMING ARTS FUND (2006) [FI] Established by Connecticut Heritage Productions in memory of Dr. Lois and Eva Loffredo to benefit arts organizations serving Middletown, East Hampton and/or Portland.


SONYA AND JEFF MADOFF FUND (2004) [UR]

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


PHYLLIS M. MCDOWELL FUND FOR THE ENVIRONMENT (2010) [FI] This Fund will ensure our region’s natural resources are enhanced, not diminished, and that Middx County remains a unique area to enjoy – and to live, work, play and treasure.

KATHERINE AND WILLARD MCRAE FUND (2001) [FI] Supports education programs in Middletown.

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.

ELLEN AND HERB PATTERTON MEMORIAL FUND (2009) [UR] In honor of Ellen and Herb’s devotion to their community and their 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.


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

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

SARI A. ROSENBAUM FUND FOR WOMEN AND GIRLS (2002) [FI] Established to empower women and girls to be self-reliant and reach their potential. This fund was renamed in honor of Sari, to recognize her years of service to the Community Foundation and the important role she played in empowering women and girls in our community.


SAUNDERS FUND (2005) [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]

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

PATTI ANNE VASSIA FUND (2001) [UR]

SUSAN AND WILLIAM WASCH FUND (1999) [UR]

WESLEYAN UNIVERSITY COMMUNITY FUND (2002) [DS] 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.

JAN ELLEN YOUNGBLOOD FUND (2004) [UR] To provide unrestricted support for our community now and forever.
### 2012 APPROVED GRANTS FROM DONOR ADVISED FUNDS

**TOTAL AWARDED:** $187,740.10

<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount</th>
</tr>
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<tbody>
<tr>
<td>Goodspeed Opera House Foundation</td>
<td>$2,500</td>
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<tr>
<td>Guest House Conference and Retreat Center</td>
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<td>International Foundation for CDKL5 Research</td>
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<td>Kappa Kappa Gamma Foundation</td>
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<tr>
<td>Kingswood-Oxford School</td>
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<td>Kuhn Employment Opportunities</td>
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<td>Levi E. Coe Library Association</td>
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<td>Middlefield Federated Church</td>
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<td>Middlesex Community College Foundation</td>
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<td>Middlesex Habitat for Humanity of Connecticut</td>
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<td>Middlesex Hospital</td>
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<td>Middletown Adult Education – Even Start Program</td>
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<td>North End Action Rising – The Buttonwood Tree</td>
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<td>Pretty Wings Outreach: A Force Against Domestic Violence</td>
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<td>Ray of Light Farm</td>
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<td>Region 4 Education Foundation</td>
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<td>Regional School District #13</td>
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<td>Rotary Club of Essex Foundation</td>
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<td>Rushford Center</td>
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<td>Salvation Army of Middletown</td>
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<td>Shoreline Soup Kitchens and Pantries</td>
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<tr>
<td>St. Vincent de Paul Place/ Amazing Grace Food Pantry</td>
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<td>Trinity College</td>
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<td>Visiting Nurses of the Lower Valley</td>
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<tr>
<td>Yale Cancer Center</td>
<td>$4,486.53</td>
</tr>
<tr>
<td>YMCA of Northern Middlesex County</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

### DONOR ADVISED FUNDS

- **AVERY’S FUND** (2010) [DA] CDKL5, a rare disease with a personal, local, lovely face - Avery Rose Leopoldino of Old Saybrook. This fund supports the research into the cause and a cure for CDKL5.

- **JOHN AND JEAN BECKERT FUND** (2007) [DA]

- **SALLY AND ROBERT BOODY FUND** (2011) [DA] Recognizing CFMC can offer knowledge and resources to leverage their philanthropic choices, fund supports, projects and programs they care about throughout the community.

- **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.

- **HUGH L. AND JUDITH R. COX FUND** (2000) [DA] Dutch Oil Benevolence Fund (2011) [DA] Believing “buying locally” and “giving locally,” Dutch Oil established a customer loyalty program through which Dutch Oil and its customers can work together to support the programs and services supporting their community.

- **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 UNENDED & ENDOWED FUNDS** (2009, 2010) [DA] To share the purpose of charitable giving with their children, these funds support programs and partnerships today and provide a foundation for giving for future generations.

- **JONES FAMILY FUND** (2012) [DA] Using the resources, knowledge and expertise of CFMC, Mary Jones established two funds- an unendowed fund to support organizations and services working in our community today, and an endowed fund to build for future needs and passions.

- **LIVE LOCAL GIVE LOCAL 365** (2011) [DA] Why Live Local Give Local 365? It’s Philanthropy, Pure and Simple. This fund brings people together, believing philanthropy is as simple as $1 a day, to pool donations. What can a dollar a day do? Together, with others, it can grow and be a catalyst for good, accomplishing a great deal.

- **J. GUY LOMBARDO DONOR ADVISED FUND** (2003) [DA]


- **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.
HOWARD AND YVONNE MCAULIFFE FUND (2000) [DA]


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.


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

NUTMEG FUND (2011) [DA] Established by a former resident of Middlesex County with a vested interest in improving the quality of life in our County. The family selected the Community Foundation as the vehicle for putting their hearts and dollars to work for the benefit of all.

PRESIDENT’S DISCRETIONARY FUND (2008) [DA-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.

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.

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.

THE SHAMROCK FUND (2011) [DA] Brian O’Rourke is an institution and is known for his extraordinary generosity and giving ways. He knows how a group of dedicated caring individuals can really make a great community. Recognizing a like-minded purpose in the Community Foundation, he established this fund to help local nonprofits build capacity and improve services.

KENT S. WARNER MEMORIAL FUND (2002) [DA] Grants support local programs that maintain and support healthy families and international development efforts.

WHELEN FAMILY FUND (2011) [DA] The Whelens chose to establish a fund which could engage their entire family in giving back as well as encouraging others in our region to give by offering challenge grants for various projects.

WILLIAMS-ROSEN MEMORIAL FUND FOR VETERANS (2010) [DA] Greg Kalkreuth chose to support organizations working with and on behalf of veterans in Middlesex County in memory of his great uncle and grandfather, honoring all those who are in the service of their country.

WILTSIE FAMILY FUND (2011) [DA] Rachel believes giving is a “family affair” and worked with CFMC to establish a fund which will include her family in the giving decision-making process.

| Recipients of the 2012 Bill’s Seafood Golf Tournament Athlete Scholar Fund awards |

RRyline's Circle of Giving Fund (2008) [DA]

2012 APPROVED GRANTS FROM DESIGNATED FUNDS
TOTAL AWARDED: $206,484.38

| TOTAL AWARDED: $206,484.38 |

| Community Music School / $2,603 / Carolyn Greenleaf Fund |
| Connecticut Rivers Council BSA / $368 / Arthur and Edythe Director Connecticut Rivers Council BSA Fund |
| Cromwell High School / $1,000 / Arthur and Edythe Director Family Award Fund |
| Town of Essex / $50,000 / Sister Cities Essex – Haiti Fund |
| Essex Basketball Court Subcommittee (Town of Essex) / $1,275 / Essex Basketball Center Project Fund |
| Essex Winter Series / $1,500 / Elizabeth Swaim Arts Enrichment Fund |
| Ivyton Playhouse Foundation / $500 / Sari A. Rosenbaum Fund for Women & Girls |
| Ivyton Playhouse Foundation / $6,132.63 / Jacqui Hubbard & Norman Needleman Honorary Fund for the Ivyton Playhouse Foundation |
| Mercy High School / $2,500 / William and Mary Tomc Memorial Fund |
| Middlesex County Historical Society / $2,879 / Elizabeth Swaim |
| Middlesex County Historical Society Fund |
| Middlesex County NAACP / $700 / Ida M. Masselli NAACP Award Fund |
| Middletown High School / $500 / Elizabeth Mary Pernel Award Fund |
| Middletown High School Wrestling Program / $4,000 / Colter Abely Achievement Fund |
| Middletown Public Schools Cultural Council / $1,000 / Elizabeth Swaim Arts Enrichment Fund |
| Middletown Public Schools Swaim Strings Program / $14,300 / Elizabeth Swaim Arts Enrichment Fund |
| Middletown Rotary Club / $1,156 / Arthur and Edythe Director Family Middletown Rotary Fund |
| Monroe Comprehensive High School / $1,000 / John and Irene Bolden, Sr. Award Fund |
| Morgan High School / $2,000 / Bill’s Seafood Golf Tournament Athletic Scholar Fund |
| Nathan Hale-Ray High School / $1,000 / Ashworth Family Award Fund in Memory of Ronald and Heather Lind Ashworth The Nature Conservancy / $33,432 / Fund for Preservation and Stewardship of Natural Areas |
| North End Action Team / $9,100 / Live Local Give Local - NEAT Fund |
Old Saybrook High School / $2,000 / Bill's Seafood Golf Tournament Athletic Scholar Fund
Smith College / $500 / Mary C. Rawlins Award Fund
Tri-Town Youth Services / $697 / Tri Town Youth Services Fund University of Connecticut / $500 / Joan Mars Music Award Fund
Valley Regional High School / $2,000 / Bill's Seafood Golf Tournament Athletic Scholar Fund
Valley Regional High School / $2,000 / Chris Belfoure Unendedowed Memorial Fund
Westbrook High School / $6,000 / Bill's Seafood Golf Tournament Athletic Scholar Fund
Xavier High School Wrestling Program / $4,000 / Colter Abely Achievement Fund
YMCA of Northern Middlesex County / $51,832.75 / Ingersoll Outdoor Center Fund

TRANSFER OF FISCAL SPONSORSHIP
CONNECTICUT FOREST & PARK ASSOCIATION / $21,344.63 / CONNECTICUT YANKEE LAND CONSERVATION FUND

DESIGNATED ADVISED FUNDS

ASHWORTH FAMILY FUND IN MEMORY OF RONALD AND HEATHER LIND ASHWORTH (2005) [DS] Established to provide educational awards for Nathan Hale-Ray High School.

BILL'S SEAFOOD GOLF TOURNAMENT ATHLETIC SCHOLAR FUND (2009) [DS] To support education awards at four high schools serving the towns of Westbrook, Clinton, Old Saybrook and 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 educational awards for disadvantaged Wesleyan students.

CHILDREN'S FUND (2009) [DS] Established by Betsy Morgan and Jane McMillan to improve the lives of children (year 0 to 18).

CONNECTICUT YANKEE LAND CONSERVATION FUND (2009) [DS] (RETIRED)

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.

CROMWELL BELDEN PUBLIC LIBRARY FUND (2011) [DS] Established by the Belden Library Association to provide financial and other resources for the improvement and betterment of Cromwell Belden Public Library.

THE ARTHUR AND EDYTHE DIRECTOR FAMILY CONNECTICUT RIVERS COUNCIL BSA FUND (2011) [DS] To honor and recognize the important role Boy Scouts of America serves in the lives of Middlesex County youth.

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

ARTHUR AND EDYTHE DIRECTOR FAMILY NUTMEG BIG BROTHERS BIG SISTERS FUND (2007) [DS] 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 RUSHFORD FUND (2007) [DS] To aid the Rushford Center with its programs and initiatives to help our young people grow and prosper in positives ways.

ARTHUR AND EDYTHE DIRECTOR FAMILY SCHOLAR FUND (2008) [DS] In recognition of the important role Cromwell High School has played in their family's lives, this Fund provides education awards for deserving Cromwell High School seniors.

ARTHUR AND EDYTHE DIRECTOR FAMILY YMCA CAMP INGERSOLL FUND (2007) [DS] 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.

ESSEX BASKETBALL CENTER & GATEWAY PROJECT FUND (2011) [PF] (RETIRED)

ELLSWORTH AND VIRGINIA GRANT FUND (2011) [DS] Lifelong stewards of the Humanities and the Arts, this fund will support the organizations Ellsworth and Virginia cared deeply about for generations to come.

BARBARA WEEKS HART AND GEORGE H. HART MEMORIAL FUND (2011) [FI] Established to carry on Barbara's and George's legacies of giving and caring, this fund will provide support to organizations offering services to cancer patients in Middlesex County.

DR. JOHN HENNELLY FUND (2010) [DS] To celebrate John's commitment to Middletown Schools, MPS employees honored his work upon his retirement Fund which will support Middletown Public Schools K-12 fine and performing arts programs.

HIGGANUM VISION GROUP FUND (2011) [FS] Higganum's vision will benefit the community's health and well-being, economic vitality, cultural continuity, and connection with nature, thus improving the quality of life for this and future generations.

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.

Unrestricted Funds [UR] · Designated Funds [DS] · Donor Advised Funds [DA] · Field Of Interest Funds [FI] · Fiscal Sponsor/Designated Funds [FS/D] · Project Funds [PF]
INGERSOLL OUTDOOR CENTER FUND (2007) [DS]
Established in honor of Loretta Ingersoll, annual distributions support capital improvements for the Northern Middlesex YMCA's Ingersoll Outdoor Center.

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.

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

JOAN MATZ MUSIC SCHOLAR FUND (2004) [DS]
A memorial education grant fund for University of Connecticut students of choral studies.

MIDDLESEX UNITED WAY ENDOWMENT FUND (2010) [DS]
Endowments strengthen organizations and help secure their future and benefit the broader community for years to come.

ELIZABETH MARY PERNEL MEMORIAL FUND (1999) [DS]
Established for Middletown High School by 1965 and 1966 alumni in memory of their classmates Ed and Terri Pernel’s daughter.

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.

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

SISTER CITIES ESSEX-HAITI FUND (2010) [DS]
Established by the Whelen Family to support positive youth activities in the area and to encourage others to add to the Fund.

WHELEN FAMILY LIVE LOCAL GIVE LOCAL 365 CHALLENGE FUND (2012) [DS]
As founding members of the LLGL 365 fund and believing that philanthropy is as simple as a dollar a day, the Whelen Family established a new member challenge, matching $365 to $365 for the next 50 new members the fund receives beginning January 1, 2012.

WHELEN FAMILY TRI-TOWN YOUTH SERVICES CHALLENGE FUND (2012) [DS]
To continue building the Tri-Town Youth Services Fund at CFMC and promoting positive youth activities in the area, the Whelen Family established a “new gift match” challenge, matching gifts to the endowed fund beginning January 1, 2012 until the full match donation is met.

ELIZABETH SWAIM ARTS ENRICHMENT FUND (2020) [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.

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.

We基金

DISTRIBUTIONS FROM AGENCY FUNDS

Oddfellows Playhouse / $795

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)
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.

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 support arts and the theater for generations to come.

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)
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.
The Community Foundation is committed to meeting the ever-changing needs of our communities and fulfilling the charitable goals and passions of our donors. In 2012, you invested a record $537,164 in grants through the Community Foundation to help children – of all ages - explore the wonders of the arts; to teach people – young and old – to read; to preserve our local history for generations to come; helped caring people till the soil at numerous community gardens to feed the hungry; and more.

Yet we understand that so much of what nonprofits need to accomplish their missions goes beyond the grant. CFMC’s Nonprofit Resource Center offers free and low-cost training, guidance, and access to information for our region’s nonprofit organizations. In four years, the Nonprofit Resource Center has provided more than 1,800 staff and volunteers with training opportunities. With support from Citizens Bank, the Nonprofit Resource Center provided opportunities in 2012 to learn vital grant writing skills, develop tools for short- and long-term strategic planning, and design events to introduce new friends and supporters to their successful organizations.

Association of Fundraising Professionals (AFP) Connecticut Chapter once again partnered with CFMC to provide access to AFP webinars, free of charge to our nonprofits, covering topics such as “Revitalizing Your Development Program, 30 Steps in 30 Days,” “Nonprofit Branding Strategies,” and “How to Talk to your Board – Providing Long-term Development Vision.”

Thanks to a grant from Guilford Savings Bank, one of the leading presenters on nonprofit governance and management, Chuck Loring spent the morning with representatives from 20 organizations exploring how to improve nonprofit board governance through establishing a strong board structure and developing sound board/staff partnerships.

THANK YOU!
Thanks to the generosity of Liberty Bank Foundation, we gathered in July with our friends, donors, and nonprofit colleagues to celebrate “Good People Doing Great Things.”
A planned gift to the Community Foundation is a way to give back to the community and nurture its future. Think about what has been important to you and your family and how you would like to support those goals and needs long into the 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.

CFMC 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.

**CFMC Legacy Society**
3 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 $13.6 million from 17 individuals.

Anonymous (12)
Jeanette Archer-Simons and Robert E. Simons
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. *
Santo Fragilio #
Ralph and Gail Gometz
Esther* and Richard * Goodwin
George Hart
Beatrice Casey Holt
Elizabeth Horn
Loretta K. Ingersoll *
Robin Jones *
Marcia and David Kalayjian
George and Phyllis Kinser
Robert L. Kirkpatrick, Jr.
Gayle Kranz
Lisa and Lamar LeMonte
Sonya and Jeff Madoff
Arlene R. Mazotta
Edward L. McMillan
Jane Stokes McMillan
Deborah L. Moore
Ellen Patterson *
Liz Petry
Barbara and David Preston
Jean M. Richards
Sari and Howard Rosenbaum
Dave and Eunice Royston *
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
Kevin Wilhelm
Charles and Rachel Wiltsie
Jan Youngblood
Joan S. Youngs

# New or additions in 2012
* Bequest received/announced

**How a Legacy Builds a Better Today and a Brighter Tomorrow**

Richard H. and Esther B. Goodwin loved the wild land in the watershed of Eightmile River. Their legacy, invested in the Fund for Preservation and Stewardship of Natural Areas, helps The Nature Conservancy give quality stewardship to the Burnham Brook Preserve, maintaining and sustaining the beauty that captured their hearts.

Elizabeth Swaim’s passions were the arts, history, and the community in which she lived, worked and played. Her legacy invested three funds, all focused on one important goal—establishing a sound future for the Middletown community and providing opportunities to explore the arts, understand the history, and support the community for generations.
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.
David Miner and Stephanie Robiner
William and Maureen Morris
Estate of Ellen Patterson
PCI medical, Inc.
Edward and Theresa Pernel
Sara B. Piersen
David and Barbara Preston
Jon and Susan Pringle
Dyanne Ralaf
David and Eunice Royston
Mary Anne O. Salem
Susan E. Saltus
Gary and Beth Salva
Betsy and David Sams, Jr.
Joseph and Susan Sappington
Raymond and Judith Schoonmaker
Jean and Ralph Shaw
Nancy R. Smith
Margery S. Stahl
Tri-Town Youth Services
Dolores Tulinski
Rose and Ronald Turcotte
William and Susan Wasch
Whelen Engineering, Inc.
The Whelen Family
Thomas and Betsy Whidden
Kevin J. Wilhelm

Chris Belfoure Memorial Endowed and Unendowed Funds
A.A. Zanardi Co., Inc.
A.J. Shea Construction, LLC
Bombaci Tree Experts, Inc.
Louis W. Burch
Citizens Campaign Fund for the Environment, Inc.
Joel and Ulrika Citron
CT River Dock & Dredge, Inc.
Daniels Energy
EMC China

Rita Fink
From You Flowers
Kara Gibbons
Stephanie Gold
John C. Greene
Jessica Joslyn
Dane Kostin
Robert and Jaye LaMarche
Christina LaVaughn
Susan G. Lepczky
Maco Machinery Co., Inc.
Donald and Ellen McDougall
Middlesex Hospital
Middlesex Hospital Cancer Center
Neil and Patricia Mitchell
Michelle Morales
Morgan Stanley Smith
Barney, LLC
Molly Murray
Lauren Nadler
Christine Nucci
Jonathan Peck
Peck & Ficarra, LLP
Adam and Alison Perrin
Toni Robinson
Salon 154
Sapia Group, LLC
Saybrook Country Barn
Snap Fitness
Paulette Swanson
Laura Tagianetti
Linda Talbott
Tower Laboratories Ltd.
Valley Shore YMCA
Steven A. Weaver
Sandra Brown Sherman
Cheryl L. Blum
Cynthia and Randall Clegg
Gretchen and Woody Comstock
Anthony R. Cronin
David W. Dangremond
Mari Buss Dow
Pamela A. Dubey Allen
Anne and George Easton
Barbara S. Edwards
Essex Savings Bank
Eleanor Etter
Brenda and Chadwick Floyd
Celia and James Francis
Gregory and Jodie Godbout
Jennifer Grant
Henry Greenleaf and Andrea Molberg
Dora and William Grover
Jacqueline Hubbard and Norman Needleman
Patricia Hurley
Mary Jones
Nancy W. King
The Kitchings Family
Kay Knight Clarke
Peter and Tammy Kraeger
Bruce and Chantal Lawrence
Judith and Jeffrey Lovelace
Ellen K. Madere
Edwin and Nancy Mallory
Paul W. Manning
Alison S. Marcinek
Paula A. Merrick
Alden and James Murphy
Charles and Tamera Pompea
Regine M. Powell
William Purvis and Mihae Lee
Marlyn R. Regan
Nancy B. Ruedig
Philip J. Ruedig
Cemmy Ryland
Nancy J. Sandall
Susan E. Saltus
Mary Skae Sturges
Elizabeth T. P. Smith
Donna B. Stamm
Janet and Ralph Sturges
Teresa Theriault, LCSW
Phil and Rieko Wagoner
Patricia J. Whitman
Jeanette H. Wiggins

Sari A. Rosenbaum Fund for Women & Girls
Patricia A. Alston
Amato’s Toy & Hobby
Barbara and Mehadin Arafeh
Lovee and Bob Arum
Janice M. Arkeson
Anastasia Baldwin
Carol Devaney and Jennifer Barry
Nancy A. Bauer
Bonnie Bernett
John Biddiscombe and Gail Gorton
Carol Blancto
Elizabeth Bobrick
Priscilla Bollard-Wilder
Sallie P. Boody
Linda and John Bowers
Catherine Branch Stebbins
Susan S. Brelfley
Kathryn I. Briggs
Alison Brinkmann
Leslie A. Bulon
Peggy Carey Best
Jessica Carso and Nicole Schulz
Eleanor D. Champion
Cheryl B. Chandler
Robin A. Chapin
Helen and William Chatman
Barbara B. Clark
John and Judith Clark
Sharon D. Clark
Cynthia H. Clegg
Philip and Clio Coles/PCI medical, inc.
Jane Corcillo
Jule A. Crawford

Carolyn R. Greenleaf Endowed and Unendowed Funds
Robin Andreoli
Amalia C. Apostolitis
Maureen O. Augusiaik
Leslie Barlow
Gloria Bohan Moss
Theresa and Mark Bonney

Betsy A. Crosswell, DMD
Sally M. D’Aquilla
Barbara S. Delaney
Linda A. Demas
Elizabth K. Dill
Marie Dowley
Patricia M. Dowling
Susie Dutcher
Dziao, Pickett & Allen, P.C.
Barbara Edelstein
Robin Ellis
Bernard and Veta Fabian
Lisa A. Faccadio
Andrea S. Fassler
Ann and Carl Faust
Judith L. Felton
Barbara E. Fernandez
Delight C. Ferris
Nancy Fischbach
Julie S. Flagg, M.D.
Kerrie Flanagan
Katharine Gillespie Atkinson
Susan S. Gillespie
Estelle S. Goodman
Linda and Malcolm Gorin
Denise M. Goucher
Heather and Michael Greenaway
Lee and Welles Guilmartin
Debra F. Guss
Sandra M. Hafel
Dorothena E. Hast
Joanne B. Hine
Elaine M. Hobart
Maria M. Holberg
Jacqueline Hubbard
Faith M. Jackson
Linda and Dwight Juliani
Diane E. Kaemmer
Marcia and David Kalavijan
Janice and Nelson Kalkreuth
Marcia Kamien
Joyce and Robert L. Kirkpatrick, Jr.
The Kitchings Family
Kitchings & Potter, LLC
Mary Decker Klaaren
Gale Lackey
Kathryn and Jason Brown
William R. Bowles, Esq.
Jody and Eric Bogdan
Gina and Haldan Block
Elizabeth M. Bazazi
Roseann Annino
Higganum Vision Group Fund
Suburban Stationers, Inc.
Rossi Group
Theodore and Ruth Rossi/Theodore R. Mazzotta Employment Resources
Malloves Jewelers
Robert A. Mallimson

Council of Business Partners
BEST Cleaners
Brown & Brown Insurance
Connecticut Lighting Centers, Inc.
Interfaith Open Golf Tournament
Mahoney Sabol & Co., LLP
Robert A. Mallimson
Malloves Jewelers
A.R. Mazzotta Employment Specialists
Theodore and Ruth Rossi/The Rossi Group
Suburban Stationers, Inc.

Higganum Vision Group Fund
Roseann Annino
Elizabeth M. Bazazi
Gina and Haldan Block
Jody and Eric Bogdan
William R. Bowles, Esq.
Kathryn and Jason Brown
Erin K. Callahan

Live Local Give Local 365
Joseph and Judith Shea
NEAR, Inc. / The Buttonwood Tree
Jessica Carso and Nicole Shulz
Herb and Sherry Clark
Cynthia H. Clegg
Dr. Monya Elgart
Heather and Michael Greenaway
Richard and Michelle Henderson
Wallace and Jennifer Jones/WJ Financial Advisors, LLC
Marcia and David Kalajian
Tiffany M. Knoop
Lisa C. LeMonte
David Miner and Stephanie Robiner
Gary W. Parrington
Anne and George Penniman
Scott and Karen Perry
Quentin Phipps and Alison Cleary
Mort and Jeanne Guertin-Potoff Matthew J. Pugliese
Gregory P. Rainey
John R. Schroeder, AIA
Thayer Talbott
Jeffrey and Alison Yakim

Ryan’s Circle of Giving
A-Zagar Insurance
Anthony and Catherine Badolato
The Balayna Family
David and Barbara Barry
Joanne Barry-Dutro
Peter and Judith Berger
J. Gregory and Suzanne Carroll
Cella Built, LLC
Cella-Plamagian, PC
Cynthia H. Clegg
Congregation Beth Israel
John and Emma Corbin
Patricia De Barbieri
The Chaney Family Foundation
The Declutter Specialist
William and Mary Detlefsen
Kimberly B. Dower

Lauren and Brad Drazen and Family
Lani Florian and Martyn Rouse
Alfred and Joan Gagliardi
Patricia Glazer and Robert Egan
Frank and Candida Gomes
Fred and Amelia Gomes
David and Elaine Gordon
Gerald E. Gordon
Ruth R. Gordon
Robert and Deborah Gross
Aina Lee Hoskins
Suzanne and Michael Kaplan
William and Kate Lee
The Lulg Family
Larry and Tammy MacAdams
Catherine M. Mandel
Massage by Kimberly
Alfred J. Mastranni
Michael and Marion Mastrianni
Susan E. McAuliffe Curtius
Merit Insurance
Donna and Robert Namnoum
Ruth H. Namnoum
New England Payroll Services, LLC
Toby and Mary Ann O’Neil
Laura and Dudley Orr
Arlene F. O’Tell
Alyssa and Gil Paradis and Nancy Ryan
Robert and Karen Paradis
Michael M. Pires
Dale and Robyn Poulos
Lisa and William Rappoport
Marilyn L. Rappoport
Edward and Mary Record
The Roman Family
Elizabeth Sargeant
Barry and Kathleen Schacht
Wynn and Elise Schoolnik
David and Amy Sclarsky
David Sherwood
Richard and Lori Silkoff
Alan and Sally Smirnoff
Judith A. Solomon
Mary Lou and Dick Solomon
Shoshana Sprague

Sister Cities Essex Haiti
Judith M. Anderson
Mark Aronson
George G. Arkeson
Charlotte P. Barringer
Matthew A. Baxter
Carol B. Becker
Frank and Joan Behrendt
Maxwell M. Belding
Augusta and Kenneth Benjamin
Bonnie and John Bennet
William and Betty Bevan
John P. Beveridge, Jr.
Margaret and Frank Bia
Linda F. Bierie
Edward and Martha Birch
Joseph and Kathleen Bisson
Roy E. Black, Jr.
Mary and Robert Lee Blackwell
Daniel and Scotty Bloch
Jane A. Bolles
Robert S. Boltnax, M.D.
Mary E. Boone
Dawn Boulanger
Weston and Sharon Bray
Thomas and Gail Briggs
Stephen and Alison Brinkmann
Doris Brunschwig Peake
Walter and Elizabeth Budney
Suzanne and Edmund Burke
Robyn E. Butler
Wendi B. Cain
Margot Calder
Vincent G. Capece, Jr.
Richard E. Carlson
Jennifer K. Carpenter
Susan E. Carpenter
Anthony C. Carrano
William and Helen Chatman
Chester Elementary School
Rita G. Christopher
Church of the Beloved

Church of the Beloved
Rita G. Christopher
William and Helen Chatman
Chester Elementary School
Rita G. Christopher
Church of the Beloved

William and Margaret Robertson
Roselle Park Appliance, Inc.
Barbara Saladin
Rosemary Shaffer
Shepherd Hill Equine Clinic
Michael R. Steele
Emmett J. Sullivan, Sr.
Irene Sweeney
Valerie Tartaglia
Jennifer L. Thompson
JPT Trucking, LLC
John and Sharyn Von Ogden
Waterford Country School
Theresa Watford
Karen I. Wysocki
Leah Wysocki
Jennifer Young
Elizabeth M. Ziezulewicz

Kimberly B. Dower
William and Mary Detlefsen
The Declutter Specialist
The Chaney Family Foundation
Patricia De Barbieri
John and Emma Corbin
Congregation Beth Israel
Cynthia H. Clegg
Cella-Flanagan, PC
Cella-Built, LLC
Peter and Judith Berger
J. Gregory and Suzanne Carroll
Cella Built, LLC
Cella-Flamagian, PC
Cynthia H. Clegg
Congregation Beth Israel
John and Emma Corbin
Patricia De Barbieri
The Chaney Family Foundation
The Declutter Specialist
William and Mary Detlefsen
Kimberly B. Dower
Gifts in Honor of
Brian and Chaleen Abely
Jen Alexander
Pat Alston
Janice Arkeson
Kate Gillespie Arkinson
Leslie Barlow
Bonnie Bennet
Amy Bloom
Eileen Braceforte
Stephen and Alison Brinkmann
Jane Brown
Vincent G. Capece
Susan Carpenter
Barbara M. Carso
Jessica Carso
Robin Chapin
Heather Chase
Sherry Clark
Sherry and Herb Clark
Cynthia H. Clegg
Randall Clegg
Margaret Colella
Ruth D'Aquila
Deborah DeCristoforo
Ondra K. Dismukes
Nikole Doolittle
Barbara Edelstein
Karen Edelstein
Michele Edelstein
Susan Englishardt
Karen Erickson
David Evangelisti and Dan Taylor-Stypa
Andrea Fassler
Fassler Women
Geri Ficarra
Nancy Fischbach
Cindy Gollaireny
Felicia Goodwine-Vaughters
Phyllis and Barry Gordon
Gail Gorton
Jennifer Grant
Sharon Griffin
Yvonne Haynes
Maria Holzberg
Paddy Hurley
Jacqueline Hubbard and Norman Needelman
Mary Jones
David and Marcia Kalayjian
Gregory S. Kalkreuth
Sarah Keenan
Mara Kelley
Joyce Kirkpatrick
Robert L. Kirkpatrick, Jr.
Suzanne Kitchings
Suzanne and Chester Kitchings, Jr.
Mary Klaaren
Ronna Kuzinski
Jean LaTorre
Isabel Leach
Avery Leopoldino
Mark and Kristin Leopoldino
Kathleen Maher
Moira Martin
Lee May
Lyn May
Antoinette Mazotta
Arlene R. Mazotta
Esther J. McCann-Leopold
Sue McCann
Phyllis McDowell
Sharon McInerney
Lucy McMullan
Kathy McRae
Judith Merida
Nancy Meyers
Mary Jane Minkin
Alison Mitchell
Deb Moore
NEAR, Inc.
Connie O'Brien
Geraldine O'Connor
Maureen O'Grady
Martha Ohaus
Tracey Ohaus
Susan Owens
Jane Page
Laura Pedersen
Bonnie Penders
Manuela Peralta
Maribeth Price
Cathy Probolus
Thea Putnam
Dyanne Rafal
Julie Rappoport
Martha Rennie
Marjorie and Robert Rosenbaum
Cemmy Ryland
Mary Anne Salemi
Judy Schoonmaker
Brenda Schulz
the birth of Selina Jean
Sarah H. Shapiro
Jean and Ralph Shaw
Irene Silberstein
Wayne and Ann Southwick
Sheryl Sprague
John T. Talbott
Thayer Talbott
Nanci Thibault
Patti Vassia
Janet Verney
Anna Wasescha
Jessica Whelen
Priscilla Wilder
Rachel Wiltsie
Marcia Wrubel
Leah Wysocki
Polly Zarella
Nancy C. Zimmer
Mary Beckley
Betsy Allen-Butcher
Grace C. Cairelli
Wanda Cairelli
Grace Carey
Florence Chalker
Christine Chesnake's mother
Dr. Couch's Parents
Leslie Coursney
Julia Curtin
Julie Curtin
Elizabeth C. Czahowski
Edward de Groff
Raymond H. Devanney
Edythe Director
Russell G. D'Oench, Jr.
Robert Ellis
your mom, Ellie
Nancy Esposito
Patricia Evans
Betsy Fagan
Harry A. Fanslau, Sr.
Betty Faust
Gwendolyn Felton
Margaret Fowler
Henry Frenkel
Lorraine Goldfield
Dona S. Goodman
Gerald E. Gordon
Ryan C. Gordon
Carolyn Greenleaf
Gretchen
Bill Griffin's mother
Mary Hall
Nellie Hall
Robert Hall
Barbara and George Hart
George H. Hart
Robert F. Herbst
Phyllis A. Howe
Anne E. Kalayjian
Mary Ann Lambert
Helen S. Lawton
Betty Lourie
Marshall Madow
Donald Malcarne
Joan Matz
Howard May
Phyllis McGee
Lee McQuillen's Dad
Mulligan
Caddy Nolde
Ann Nussbaum
Lynn O'Halloran
Marilyn O'Halloran
Gino Origlia
Frances Palazzolo
Gertrude Parker
Ellen Patterson
Elizabeth Mary Pernel
Angela C. Richard
Janet Richetelli
Sari A. Rosenbaum
Edith D. Rosener
Ryan and his grandparents, Beverly
and Gerald Gordon
Santo's wife
Pat Singleton
Robyn Sparks
Elizabeth Swaim
Mrs. Timmerman
Ann S. Traylor
Robert Vassia
Veronis and Frances
Willard's sister
Monica Wolff
Ken Zak
Partners in Philanthropy

Herb and Sherry Clark
CFMC awarded its first philanthropy award during the 15 Candles Anniversary Celebration. Herb and Sherry Clark were honored in recognition for their longstanding spirit of giving, their extraordinary commitment to helping others throughout Middlesex County, and their leadership in promoting philanthropy each and every day. In further recognition of their lifelong commitment to Middlesex County and the Community Foundation, the CFMC philanthropy award will be known as the Herb and Sherry Clark Philanthropy Award at the Community Foundation of Middlesex County.

STATEMENT OF FINANCIAL POSITION

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash &amp; Investments</td>
<td>$8,653,823</td>
<td>$7,052,448</td>
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<tr>
<td>Contributions Receivable</td>
<td>922,662</td>
<td>91,989</td>
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<tr>
<td>Split-Interest Agreements</td>
<td>85,411</td>
<td>68,456</td>
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<tr>
<td>Other Assets</td>
<td>17,906</td>
<td>492</td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$9,679,802</td>
<td>$7,213,385</td>
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<tr>
<td><strong>LIABILITIES &amp; NET ASSETS</strong></td>
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<td><strong>LIABILITIES</strong></td>
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<tr>
<td>Agency Endowments</td>
<td>$499,071</td>
<td>$447,140</td>
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<tr>
<td>Grants Payable</td>
<td>252,460</td>
<td>242,986</td>
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<tr>
<td>Split-Interest Agreements</td>
<td>18,595</td>
<td>10,305</td>
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<tr>
<td>Expenses Payable</td>
<td>12,591</td>
<td>12,581</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td>$782,717</td>
<td>$713,012</td>
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<tr>
<td><strong>NET ASSETS</strong></td>
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<tr>
<td>Unrestricted Net Assets</td>
<td></td>
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</tr>
<tr>
<td>Endowment</td>
<td>$1,935,096</td>
<td>$1,104,043</td>
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<tr>
<td>Donor Designated</td>
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<tr>
<td>Donor Advised</td>
<td>729,797</td>
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<tr>
<td>Undesignated Endowment</td>
<td>5,198,670</td>
<td>3,853,096</td>
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<tr>
<td><strong>Total Endowment</strong></td>
<td>$7,863,563</td>
<td>$5,269,406</td>
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<tr>
<td>Administration &amp; Other</td>
<td>966,706</td>
<td>1,171,539</td>
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<tr>
<td><strong>Total Unrestricted Assets</strong></td>
<td>$8,830,269</td>
<td>$6,440,945</td>
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<td>Temporarily Restricted Net Assets</td>
<td>66,816</td>
<td>59,428</td>
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<td><strong>Total Net Assets</strong></td>
<td>$8,897,085</td>
<td>$6,500,373</td>
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<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td>$9,679,802</td>
<td>$7,213,385</td>
</tr>
</tbody>
</table>

STATEMENT OF ACTIVITIES REVENUE

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gifts &amp; Contributions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowed</td>
<td>$1,854,192</td>
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<tr>
<td>Unendowed</td>
<td>529,642</td>
<td>436,900</td>
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<tr>
<td>Administration</td>
<td>337,639</td>
<td>276,120</td>
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<tr>
<td>Split-Interest Agreements</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Inkind Contributions</td>
<td>54,646</td>
<td>25,659</td>
</tr>
<tr>
<td><strong>Total Gifts &amp; Contributions</strong></td>
<td>$2,776,319</td>
<td>$1,564,451</td>
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<tr>
<td><strong>Investment Income</strong></td>
<td>262,277</td>
<td>175,444</td>
</tr>
<tr>
<td>Net Realized Gains (Loss)</td>
<td>9,543</td>
<td>20,716</td>
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<tr>
<td>Fees - Agency Endowments</td>
<td>9,327</td>
<td>8,693</td>
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<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>$3,057,466</td>
<td>$1,769,304</td>
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<tr>
<td><strong>EXPENSE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants - Unendowed funds</td>
<td>$353,584</td>
<td>$338,494</td>
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<tr>
<td>Grants - Endowed funds</td>
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<tr>
<td>Program Services</td>
<td>155,645</td>
<td>112,341</td>
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<tr>
<td>Management &amp; General</td>
<td>246,800</td>
<td>169,385</td>
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<tr>
<td>Fundraising</td>
<td>159,537</td>
<td>105,026</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSE</strong></td>
<td>$1,097,494</td>
<td>$853,115</td>
</tr>
<tr>
<td>Unrealized (Loss) Gain</td>
<td>437,085</td>
<td>(93,229)</td>
</tr>
<tr>
<td><strong>(DECREASE) INCREASE IN NET ASSETS</strong></td>
<td>$2,396,712</td>
<td>$840,960</td>
</tr>
<tr>
<td>Net Assets at beginning of year</td>
<td>6,500,373</td>
<td>5,659,413</td>
</tr>
<tr>
<td>Net Assets at end of year</td>
<td>$8,897,085</td>
<td>$6,500,373</td>
</tr>
<tr>
<td><strong>Planned Gifts</strong></td>
<td>$13,662,800</td>
<td>$13,543,000</td>
</tr>
</tbody>
</table>

2012 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 with two Financial Management firms, 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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Durham
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Lyme
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Melissa Schilke

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Director of Programs & Operations
Janice Kalkreuth  
Office & Finance Manager
Wanda L. Guzman  
Program Associate

2012 Board of Directors & Committees
We thank you for investing through the Community Foundation. Your Hearts, Your Passions, and Your Convictions make Middlesex County the best community in which to Live, to Work, and to Play. You, indeed, show that Philanthropy Matters. Philanthropy Works.
SHARING HOPE, SHARING A GIFT – INSPIRING A COMMUNITY

Leah Wysocki’s note from Christmas 2012 is why all of us at the Community Foundation are honored to work with so many of you who wish to help, give back and have a positive impact.

Leah and her classmate Mara Kelley didn’t know Avery Leopoldino personally, but they had heard about her and her community’s determination to support CFMC’s Avery’s Fund and research into the genetic disorder CDKL5. Each girl chose to make a gift to Avery, and to children everywhere; Mara for her birthday and Leah for Christmas. Leah and Mara gave more than a donation. They each gave us a piece of their heart, their hope and their passion to help a girl in our community.

Leah and Mara are Partners in Philanthropy and they are why Philanthropy Matters and Philanthropy Works. Thank you, Leah and Mara, and everyone who shares hope, inspiration and a piece of their heart with the Community Foundation and Middlesex County.

Dear Team Avery,
This year for Christmas I wanted to donate the money that my parents would have spent on toys to Team Avery. That's because, I already have everything I need. Since Avery lives in our area I wanted to help research for CDKL5.

Sincerely,
Leah Wysocki
Age 10

Avery Leopoldino visited Mara Kelley (l) and Leah Wysocki (r) at Old Saybrook Middle School