Dear Valley Friends,

We are pleased to present the Valley Community Foundation (VCF) 2022 Annual Report. This year’s theme, “Moving Forward: Investing in Our Future” highlights the great work done in the past year to build a brighter future for everyone who lives and works in our beloved Valley.

We are particularly excited to share with you the stories of the nine new funds that were established last year. These funds represent a wide range of interests and priorities in our community, from scholarships for future high school graduates, to financial support for aspiring emergency medical personnel, and of course funds to support the region in general. We are grateful to the funders who have chosen to support these important causes and to partner with VCF in making a lasting impact in our community.

In addition to these new funds, we are proud to report that VCF had another successful year of grantmaking in 2022. More than $2.4 million was distributed last year in grants to Valley organizations and causes. The VCF board and staff, along with our partners in philanthropy, The Community Foundation for Greater New Haven, worked tirelessly to review applications, conduct due diligence, and make thoughtful decisions about where to invest resources. We are confident that the grants awarded in 2022 will make a meaningful difference. One of the key tools we use to guide our grantmaking
is the Valley Community Index. Last year, we were thrilled to help share the new 2022 Index with the region. It was a particularly positive process because so many community organizations, volunteers and leaders collaborated to make it happen. We send special thanks to our community partners that made the Index possible – Griffin Health Services, The Naugatuck Valley Health District, and DataHaven.

We would like to make a special mention of the Community Listening Sessions that were held throughout the Index process. These sessions generated detailed feedback from Valley residents. We are so grateful for their insight and the perspectives that were shared. This feedback was invaluable, and it was used to complete the final report.

We believe the Index is an important tool for understanding the overall health and well-being of our region. We encourage the entire community to be part of the next process which is participating in upcoming Community Learning Sessions that will delve deeper into the Index and provide a chance for Valley residents to be part of future solution-focused goals.

Finally, we would like to express our deep gratitude to all the donors, volunteers, and community partners who make our work possible. Without your support, we would not be able to make strides to improve our community. We are proud to work alongside you to build a brighter future for everyone who calls the Valley home.

Thank you, and we look forward to continuing our work together in the years to come.

Sincerely,

Sharon Closius, President and CEO
Jack Walsh, Board Chair
For Good. For Ever. For the Valley. It’s not just a tagline or motto, it’s the Valley Community Foundation’s guiding principle.

For Good.

The five towns that make up the Valley -- Ansonia, Derby, Oxford, Seymour, and Shelton -- are distinctively different and unique as communities. Some are rural, some urban, and some a mix of both. But one common thread runs through all of them -- the Valley is home to proud residents who care about their towns, neighbors, and the future of the region.

Last year, the 2022 Valley Community Index was unveiled after many months of review and input by volunteers, town officials, and members of the nonprofit community. This report was not just another study created in a vacuum but was meticulously honed and crafted by community stakeholders that are now using the detailed information to make data-driven decisions and guide resources to the areas of greatest need in the community.

“This index is good in so many ways,” said Jack Walsh, a member of the Valley Community Foundation’s (VCF) Board of Directors and former Chair. “It’s a crucial resource for our community, as it provides the latest data and trends that are critical to understanding the changing needs of our Valley. It’s also a call to action for all of us to make our region better. It helps to guide resources and maybe more importantly it fosters teamwork between all the towns, and nonprofits, demonstrating that we’re all in this together.”

For Ever.

So many wonderful people in the Valley have dedicated their time and talent to making a positive impact in the community. A shining example of this are the number of funds -- more than 255 -- VCF currently manages. The individual funds are all intended to help the Valley thrive.

In 2022, VCF donors established nine new funds, including scholarship, donor advised, donor designated, and organization funds. These funds will provide vital support to students, community organizations, and initiatives and improve the lives of people in the Valley.

Despite last year’s rocky financial markets, VCF’s funds are perpetual and will continue to grow over time. This means that they will always be here to support the Valley for generations to come.

“The generosity and dedication of our funders is truly inspiring,” said Nancy Valentine, VCF’s Board Chair. “They’re committed to making a lasting positive impact in the Valley and create a better future for all.”

In 2022, VCF distributed more than $2.4 million in grants to community nonprofits, organizations, and programs mostly based in the Valley.
“People don’t always see the impact these grants have but I can tell you they are substantial,” Valentine said. “From food banks, and childhood development programs, to libraries, and animal shelters, VCF funders and donors touch almost every aspect of our Valley.”

In 2022, The Kathleen Samela Food Pantry at Christ Episcopal Church in Ansonia received one of the six multi-year VCF grants. The pantry provides food to several thousand Valley residents each year.

“Without this money, we would not be able to continue to provide the life-changing services to our Valley’s most vulnerable residents,” said Meme Yocher, the food pantry’s coordinator. “Food insecurity is at an all-time high in the Valley and this grant is a real lifesaver.”

Valentine, the former mayor of Ansonia from 1995 to 1999, is passionate about her volunteer work at VCF and other nonprofits in the region.

“In a Valley that is constantly changing, it’s reassuring to know these funds will be here to help for years to come,” Valentine said. “The work we do today will help create a brighter tomorrow and we’re proud to be a part of the Valley forever!”

For the Valley.

As VCF’s 2022 Annual Report was being compiled, it became evident that the new funds -- like all those that had come before -- had been established by caring and loving people who wanted to make a difference in their beloved Valley. Many of these funds were set up with the intent of leaving a legacy in honor of a loved one -- or support the community as a whole -- but doing so in a selfless way that benefits others.

Barbara Lombardi and Betsey Doane are two such Valley residents who decided to establish a fund last year. The Lombardi Twins Fund for the Valley will support causes and programs that need help, plain and simple, they said. Both are longtime volunteers and active in Valley organizations. But both wanted to make sure they could support their Valley when they’re gone.

Last year, along with the new donors, VCF worked closely with dozens of extraordinary people at nonprofits in the Valley that have literally saved and changed lives. Nonprofits like TEAM, Inc., BHcare, Spooner House, and so many others, fill the “sometimes life-threatening” cracks in our local safety-net system, providing food, fuel, healthcare support, and so much more.

“The people and families connected to our funds and area nonprofits are truly the heart and soul of essence of our Valley,” said Sharon Closius, VCF’s President and CEO. “I hate to think what our Valley would be like without our nonprofits. They all do remarkable work, day in and day out, and always with limited resources.”

Along with area nonprofits, many of our Valley schools benefit from funds established at VCF.

The Andy Brennan Memorial Fund was created by his parents, Jo Ann and Bill. Since 1979, the year Andy passed away, they made sure that his memory was kept alive through awards and scholarships at the Shelton schools Andy attended.

Last year, they decided to move the scholarship and awards permanently to VCF to honor their son. Students who receive the scholarships will never get to meet Andy, but through Jo Ann and Bill’s foresight and generosity, they will know the gifts he gave to others during his lifetime. Andy never let the obstacles in his life define him. He was kind, intelligent, and very courageous.

VCF funds are not just limited to scholarships or general community support. Last year the Advancing Heroes Fund was established in memory of Jeffrey Vrlik, a beloved nurse and local family man. Jeff died suddenly at age 54 and the fund created by his family in his memory will help support people who want to become EMTs, paramedics, or nurses.

“Jeff’s family saw the impact he had on so many lives and they wanted to continue his legacy,” Closius said. “Their fund will provide opportunities for others to follow in his footsteps and make a difference in their communities.”

Throughout last year, like every year, the people who came to VCF to establish new funds or scholarships all had different ideas and intentions. Like all the Valley’s nonprofits, each fund VCF manages is unique and created with a purpose in mind to leave an equally unique legacy.

“All these funds represent the selfless nature of the residents of our Valley,” Closius said. “The people and families who established these funds come from a variety of backgrounds and experiences, but their investment in the future and love for the Valley is what unites them and unites us all.”
New Funds of the Valley Community Foundation

The Valley Community Foundation (VCF) is privileged to introduce the nine new funds established in 2022, and the amazing people, stories and organizations connected to them. The caring and loving donors that created these funds did so for a variety of reasons and all are designed to improve our Valley.

For nearly 20 years, donors have looked to VCF to boost local philanthropy, and use its expertise, knowledge of the community, and unwavering commitment to help the Valley prosper. That is exactly what these nine funds do.

The staff and Board of Directors are deeply honored by the 2022 funders for entrusting their legacies and stories of their loved ones to VCF. Everyone at VCF stands ready to ensure these funds create a lasting impact and a positive difference in the lives of those who call the Valley their home -- now and for generations to come.

Advancing Heroes Fund

Jeffery John Vrlik loved many things. He loved and adored his wife, Kathie, and his three children, Kellen, Aidan and Kyla. He loved life and lived it to the fullest, traveling the world, becoming a skilled potter, and earning the respect of the medical community as a nurse.

The Advancing Heroes Fund at the Valley Community Foundation (VCF) was established after Jeff died suddenly in 2022 at age 54. His passing devastated his family and friends.

The donor advised fund is dedicated to furthering the education of Emergency Medical Technicians (EMTs) in the Valley community and support the educational growth of emergency medical personnel, including advanced training from EMT to paramedic, or even to pursue a degree in nursing.

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Andy Brennan Memorial Fund

Growing up in Shelton in the 1970s, Andy Brennan was like most kids. He loved school, played with his brothers, Eric and Matthew, and had a mom and dad that loved and supported him.

But by the time Andy was in the 6th grade, an untreatable spinal tumor left him paralyzed from the neck down. That didn’t stop him, however, from continuing his education, living the best life he could and even learning how to draw and paint, using his mouth to hold a brush or pencil.

“He really loved school and had good friends too,” said Jo Ann Brennan, Andy’s mom. “He was a good student and liked to compete with his friend in getting good grades. He was very competitive that way.”

Andy was 15-years old when he passed away. His parents, Jo Ann and Bill, and the entire family were heartbroken. But they immediately wanted to honor his memory and created awards and scholarships at the Shelton schools he attended during his life.

Since 1979, the year Andy passed away, Jo Ann and Bill have funded the awards and scholarships personally, diligently sending checks each year and making sure their son’s memory was kept alive at his old schools.

Despite his physical challenges, Andy never gave up and Jo Ann and Bill hold that memory close to their hearts.

“He was such a wonderful and brave boy and he never complained,” Jo Ann said. “We miss him terribly. We hope the message of his kindness, perseverance and ideals continue through others.”

Eleanor Rae DeFelice Scholarship Fund

She may not have known it -- and certainly wouldn’t have bragged about it -- but Eleanor Rae DeFelice was a trailblazer, breaking down barriers in a time when professional opportunities for women were limited.

“She was a brilliant woman who mastered mathematics, shorthand, stenography and received many local and state awards for her achievements,” said Martin DeFelice, her son. “She lived a very full life, and her family is very thankful for the years we had with her.”

Eleanor, born in 1919, graduated from business school in 1936 and started work as a bookkeeper at the F.H. Newton Company in Ansonia. It was there she honed the business skills that would serve her well throughout her life and career.

In 1939, Eleanor worked with a manager who purchased the business renaming it the Cleary Millwork Company. She was a key player in the deal, a testament to her business acumen.

“I don’t think she ever made a big deal about being a woman in the business world,” Martin said. “She just did what she was good at, and success always followed.”

Years later, the company was destroyed during the 1955 Flood. Eleanor helped relocate and reopen the company in Shelton. In 1977, it was sold again and moved to Rocky Hill. She was the top manager at Cleary Millwork and commuted to Rocky Hill daily until she retired. Her dedication to the business spanned more than 52 years.

Martin said it was a good thing the company moved to Rocky Hill because that’s where she met his father, John.
DeFelice. Eleanor and John were married for 15 years before he passed away.

“This incredible woman got married in her sixties and instantly she had a family with adult children and grandchildren,” Martin said. “She was remarkable, so kind and calming.”

Eleanor loved her large new family, and they loved her. She even legally adopted Martin and his siblings, Rosemary, Mary Jo, and John.

In 2022, Eleanor was working with the Valley Community Foundation to establish a fund to support students seeking business degrees. Unfortunately, she passed away before it was set up. Her children, however, continued her wish and established the Eleanor Rae DeFelice Scholarship Fund for graduating Ansonia High School students.

“She would be so thrilled to know that her scholarship is already helping young people,” Martin said. “That was Eleanor, always thinking ahead and planning.”

“There are many needs in the Valley, and we hope this fund will be there for those struggling,” Betsey said. “We really want to help the underserved with food, and services in general.”

Lombardi Twins Fund for the Valley

Like most teenage girls growing up in the Valley during the 1950s, Barbara Lombardi and Elizabeth “Betsey” Doane went to school, had tons of friends, learned to play the piano, and took ballet lessons.

The sisters, affectionately known as the Lombardi Twins, were quintessential Valley teenagers, doing all the things kids their age did, if not more. Their formative years of education were at the Oak Hill School in Hartford, finishing their senior year at Notre Dame High School in Bridgeport.

“We were certainly always busy at school,” Barbara said. “We wrote articles for the school newspaper, we took ballet and even participated in a couple of minstrels. Then there were music lessons and we played classical pieces in school too.”

Barbara and Betsey lost their eyesight shortly after being born, but that didn’t stop them from achieving and living full and busy lives, both then and now.

“Our mom and dad were wonderful,” Barbara said. “They exposed us to so much and they always told us there’s no such word as can’t. It wasn’t allowed in our vocabulary.”

The twins also said their parents taught them to be involved in the community and give back whenever they could.

In 2022, Barbara and Betsey established the Lombardi Twins Fund for the Valley, a donor advised fund, that supports organizations and causes dear to them.

“There are many needs in the Valley, and we hope this fund will be there for those struggling,” Betsey said. “We really want to help the underserved with food, and services in general.”

Barbara, who retired in 2017 after more than 39 years as a substance abuse and crisis counselor, is still very active in the Valley community and state. She serves on several boards, including the Naugatuck Valley Health District, President of the Derby Centennial Lions Club, and was appointed by Gov. Ned Lamont as a Commissioner to the State Independent Living Council.

Betsey is a semi-retired teacher of mathematics at Housatonic Community College and is President of the Derby-Shelton Rotary, a board member of the Valley Transit District, and an advisory board member of the University of New Haven’s Tagliatela College of Engineering.

“Being blind has never diminished their drive to succeed and give back to their community,” said Sharon Closius, VCF’s President and CEO. “These two wonderful women are extraordinary role models to so many in our Valley and state.”
**Anthony and Catherine LoPresti Family Fund**

Anthony and Catherine LoPresti may have been born, raised, fallen in love, and got married in Boston, but Seymour and the Valley were always home.

It was 1958 and the young students -- he was in college, and she was a senior at Dorchester High -- met while working part time at a local A&P grocery store. Two years later they were wed.

In 1963, a teaching job for Anthony, brought the LoPresti family to Seymour and they’ve been here ever since. Anthony would work in the Seymour School District climbing the education ladder, while Catherine stayed home and raised their six boys -- Anthony, Edward, Michael, Joseph, Thomas, and Sean.

Anthony would eventually retire as an educator in 1993, ending his career as a well-known and liked principal of Seymour High School.

But in 2017, Catherine passed away shocking the close-knit family. That year, after she was gone, the LoPresti boys realized they wanted to do something to honor her memory, and their father as well. They turned to the Valley Community Foundation (VCF) to help them establish the Anthony and Catherine LoPresti Family Fund.

“Our mom loved spending time with her family, it was her number-one priority,” Sean said. “She loved watching her children and then her grandchildren play sports. She was always there, cheering us on. She was a big fan of UConn basketball, the Red Sox, the Bruins, and the Patriots too.”

Sean said losing his mom changed the LoPresti family dynamic forever. “She was a devoted, strong, loving and generous wife, mother and grandmother,” Sean said. “She was the matriarch and the glue that kept everything in order and held us together.”

Along with being a dedicated educator, Anthony also served on many town boards and committees. In the fall of 2017, prior to losing his beloved Catherine, Anthony received the Kennedy-Pawlak Award for his years of public service to Seymour.

“Seymour was good to me and my family, and I wanted to give back a little bit,” Anthony said. “I don’t know if I gave enough but I was happy to stay in Seymour the rest of my life.”

The Anthony and Catherine LoPresti Family Fund provides scholarships each year to a graduating male and female Seymour High School student-athlete. The graduates must have good grades, demonstrate strong leadership skills, be role models to their peers and have “never give up” attitudes.

**Dr. Teresa Tottenham Sievers Scholarship Fund**

“I always knew my Teresa would do something extraordinary in her life,” says Mary Ann Groves, about her daughter, the late Dr. Teresa Tottenham Sievers. “Even as a young child, she seemed to know things beyond her years, so when Teresa spoke, we all listened.”

Outrageously funny, vivacious, and spirited, Teresa defied the studious stereotype, but nonetheless graduated Ansonia High School’s Valedictorian in 1986.

After receiving her Bachelor of Science from Fairfield University and graduating with honors from Ross University School of Medicine, Teresa became board certified in internal medicine. Unsatisfied with the status quo of treating disease with prescriptions, Teresa returned to school earning her Master of Science in Metabolic Medicine. Craving still more knowledge, Teresa returned to school again adding certifications with the American Board of Integrative and Holistic Medicine, and later Functional, Anti-aging and Regenerative Medicine.

Armed with knowledge beyond western medicine and a healing toolkit that surpassed her colleagues, many of Dr. Sievers’ patients were getting off their medications, but for those who weren’t, Dr. Sievers wanted to know why.

Her timely discovery of cell biologist Dr. Bruce Lipton’s research was revelatory: the onset of disease had less to do with genetics and everything to do with unresolved emotional distress. Dr. Lipton’s research lit a fire of curiosity and determination within Dr. Sievers. Boldly, she adopted energy healing into her practice and spent time...
Valley Community Foundation  |  Annual Report 2022  |  NEW FUNDS

Talking to patients, asking what was going on in their lives or in their past that might be expressing as disease in their body. Teresa’s patients adored her, and soon people started coming from all over to meet this one-of-a-kind doctor with a passion to facilitate their journey to emotional and physical wellness.

“Teresa was determined to reach the masses and shake up western medicine. More than anything, she wanted people to understand the powerful connection between their emotions and their health,” says Teresa’s sister Annie Tottenham Lisa. “This was a very provocative, proclamation from a western trained physician, and it put Teresa in a class of her own.”

After Teresa’s untimely passing in 2015, her classmate and beloved friend Kathy Strom began a scholarship with great support from Teresa’s classmates. With a desire to provide a lasting memory for her daughter, Mary Ann chose to establish the Dr. Teresa Tottenham Sievers Scholarship Fund at the Valley Community Foundation as a perpetual gift to honor the Valedictorian of Ansonia High School.

**“Teresa was determined to reach the masses and shake up western medicine.”**

Ted Vartelas Family Fund

Theodore “Ted” Vartelas was a man who touched the hearts of everyone he met. He was a sports legend in the Valley and the UConn athletic community. Above all, he was a devoted father, grandfather, and uncle, who loved his family more than anything.

Robyn Reilly, Ted's daughter, said she and her brother, Jonathan Vartelas, and sister, Pam Alessio, established the Ted Vartelas Family Fund at the Valley Community Foundation (VCF) to continue his legacy of helping others.

“Our father was the youngest of 12 in a large Greek American family where everyone helped each other,” Robyn said. “He raised us that way too, so this is a way we can pay it forward.”

The donor advised fund will support Valley causes and programs that need help, Robyn, Jonathan, and Pam said.

Ted Vartelas’ love for sports was evident from an early age. He was a star athlete at Ansonia High, playing basketball, baseball, and football, and was eventually inducted into the school’s Hall of Fame. In the 1950s, he continued to excel in basketball at Southern Connecticut State University and then at the University of Connecticut.

“Dad was a true Valley guy through and through,” Jonathan said. “He loved this community and everything it stood for. He always said it was special and a great place to live and raise a family. He always wanted others to know that too.”

His children say their dad was deeply proud of his Greek heritage and instilled that pride in them. He also taught them about hard work and led by example. Ted’s business career is just as remarkable as his sports and community achievements. He was a top agent for the New York Life Insurance Company and worked there for more than 65 years. There’s even a special conference room named after him at the company’s Stratford headquarters.

Ted Vartelas passed away in 2020 at the age of 89. His children said because of the COVID-19 restrictions at the time, the family couldn’t hold a proper funeral or memorial service for him. They said establishing this fund is a way they can properly say thank you and goodbye to their dad.

“He was a legend in the Valley, but to us, he was simply our father,” Pam said. “We miss him and his wisdom every day, but we know he would be proud of the work we’re doing to honor his memory.”

**“Dad was a true Valley guy through and through. He loved this community and everything it stood for.”**
Thomas H. and Alyce S. 
Wells Family Fund

The Thomas H. and Alyce S. Wells Family Fund at the Valley Community Foundation (VCF) supports four organizations close to the Seymour couple's hearts -- BHcare, the Great Hill Hose Company, the Housatonic Council Boy Scouts of America, and the Recreation Camp, Inc.

All four Valley organizations will benefit from the fund now and in the future thanks to Tom and Alyce's generosity.

“We have supported these organizations for years and by setting up this fund it basically endows our annual giving guaranteeing that support will be there long after we are gone,” Tom said. “These organizations have all played a significant role in making the Valley better and we wanted to ensure they can continue to serve the community.”

The Wells family is one of the oldest in the Valley, stretching back several generations. Tom, a retired banker, is also very familiar with VCF. In 2017, he and his siblings established a VCF fund to honor their parents – Henry Shelton Wells and Edith Birdseye Wells.

“We hope that our fund can help these organizations expand their reach and impact, and that it will inspire others in the community to give back in their own ways,” Alyce said. “We have been fortunate to have the means to make this contribution and we hope that it will make a meaningful difference in the lives of those who are served by these organizations.”

Tom and Alyce established the new fund using a portion of an IRA’s required minimum distribution, or RMD. Instead of Tom and Alyce taking the distribution as taxed income, the IRS allows the RMD to come directly to VCF and their donor designated fund untaxed.

“We can’t do that with donor advised funds, that’s why we chose the donor designated fund,” Tom said. “Also, this kind of fund allows us to let go so VCF can make the annual grants for us.”

BHcare provides behavioral health and domestic violence services in the Valley. The Great Hill Hose Company in Seymour is a volunteer fire department. The Housatonic Council Boy Scouts of America provides youth development programs and camping, and the Recreation Camp in Derby offers outdoor activities such as swimming and boating for children and adults on the Housatonic River.

“We hope that our contribution and new fund will inspire others,” Tom said.

Ansonia Rotary Club Fund

The Ansonia Rotary Club has always supported the community and helped students achieve their goals. Last year, when the decision to merge with the Seymour-Oxford Rotary Club was made, the members wanted to make sure scholarship donations raised over the years would continue to benefit Ansonia students.

The Ansonia Rotary Club Fund at the Valley Community Foundation (VCF) was established to honor donor intent and foster education. In the summer of 2022, the Ansonia Rotary Club formally merged with the Seymour-Oxford Rotary, taking the new name -- The Ansonia-Seymour-Oxford Rotary Club.

“We wanted to ensure that the scholarship money donated to help Ansonia High School students would be there to benefit the community for generations to come,” said Richard Knoll, the Rotary’s treasurer. “By establishing this permanent fund at VCF we can guarantee that these scholarships will be available for Ansonia students in perpetuity.”

The Ansonia Rotary Club Fund at the Valley Community Foundation will provide an annual scholarship to a graduating Ansonia High School student. If the school ever merges or closes, the scholarship will continue to go to a student residing in Ansonia.

The Ansonia Rotary had maintained a fund at VCF for years but wanted to permanently endow the scholarship and create a new Organization Fund with VCF.

“This assures there’s a lasting legacy to benefit students in Ansonia for years to come,” Knoll said. “We believe that education is the key to success, and we’re committed to supporting students in our community. It’s really a long-term investment in the future of our Valley.”

The Rotary is a global organization dedicated to helping others and strives to make communities better. Members contribute their time, energy, and passion to carry out meaningful and sustainable projects that promote peace, fight disease, provide clean water, help mothers and children, support education, grow local economies, and protect the environment.

This Ansonia Rotary Club Fund is just one example of the many ways donors and funders help make a difference in the Valley community.

“We’re very proud to offer different types of funds so organizations and individuals can fulfill their philanthropic goals without needing to set up complicated trusts or separate entities,” said Sharon Closius, VCF’s President and CEO.
How to Set Up a Fund with the Valley Community Foundation

Define the Goal of Your Fund
Would you like your fund to be flexible so that it can address changing community needs and opportunities? Is there a specific charity or cause that you would like to support? Would you like to be involved in the grantmaking?

Name Your Fund
This is your legacy. You, of course, can be anonymous if you prefer. Whether it is a family fund or created in memory of a loved one, the fund will still be making grants many decades from now and beyond.

Contact Us
Let's have a conversation about how we can tailor your charitable goals to fit your personal situation. Whether you establish a fund now or give later via a planned gift, we will ensure your legacy and interests will be honored today, tomorrow, and forever.

We connect private philanthropy to the long-term public good of the Valley and offer several types of funds as referenced throughout this report. You can support an existing fund or establish a new fund with the use of cash, appreciated securities, IRA distributions, and more.

Our funds are managed through our partner in philanthropy, The Community Foundation for Greater New Haven, and their diversified investment portfolio. Over time, as the endowment grows, so do our funds and your ability to award grants.

By investing your charitable gift with the Valley Community Foundation (VCF) you are increasing the long-term impact of your gift. All donations to VCF are tax-deductible. When you’re ready, we will work with you to prepare the fund agreement that fits your philanthropic goals.

Make a positive impact in the Valley for generations to come by creating a permanent endowed fund. Call (203) 751-9162, visit us at 253-A Elizabeth Street, Derby, CT, or view our website at www.valleyfoundation.org.
Valley Community Foundation Funds

The Valley Community Foundation (VCF) has been a catalyst for positive change in the region since its founding in 2004. During these years, VCF has helped Valley residents and donors establish more than 255 funds that have had a significant impact on the community. The Annual Report fund section lists all the remarkable funds that have helped to improve the lives of Valley individuals and organizations.

Countless numbers of deserving students have been aided by VCF managed scholarships, and funders have provided crucial support to a myriad of area nonprofits, enabling them to carry out their missions more effectively and serve more individuals in need.

Funds managed by VCF have also played a critical role in supporting programs and organizations during times of crisis, such as the COVID-19 pandemic. In a time of great uncertainty and disruption, VCF funds provided critical assistance, helping to ensure that the Valley could weather the storm.

Donor Advised Funds
The easiest way to support nonprofits and causes dear to you through a Donor Advised Fund. Offering maximum flexibility, you recommend grants from the fund to any qualified public charity. You can also add to your fund and recommend grants from it at any time.

Kathleen and Mariano Adamo Community Service Fund
Advancing Heroes Fund
John and Paraskeve Vartelas ‘AGAPE’ Fund
Alesevich Family Fund
Bassett Family Fund
Monty Blakeman Fund
Peter F. Burns, Sr. Fund
Champagne Family Fund
Cohen Community Advised Fund
Cohen-DeToro Charitable Fund
Jane C. and David B. Cohen Fund

Nick Collicelli Legacy Fund
Frank and Ann Conroy Fund for the Joy of Music
Mary Lou Cicia Cook Memorial Fund
Salvatore and Linda Tiano Coppola Family Fund
Thomas and Ruth Curran Family Fund
D’Addario Family Fund
Michael and Elizabeth Dalton Family Fund
Derby Sister City Fund
Walter and Bonnie Drozeck Fund
Frey-Hershey Foundation Fund
Marc J. Garofalo Cultural Experience Fund
Mario Garofalo Family Fund
Raymond and Gloria Gildea Memorial Fund
David M. & Gail A. Grant Family Fund
Guarrera Family Fund
Carol Ann Hyder Memorial Fund
Jones Family Farms Fund
Kaplan Family Fund
Paul & Gloria Konwerski Family Fund
Edward and Laura Lane Family Fund
Robert C. Lang Fund

* New Fund in 2022
John Lauretti Memorial Family Fund
Barry and Josephine Lifrieri Fund
Lombardi Twins Fund for The Valley*
Kate Marks Brilliant Female Fund
Mary Fund
Carl and Patricia Miller Fund
William C. and Elaine N. Nimons Family Fund
Joseph A. Pagliaro Sr. Family Fund
Palazzi Family Fund
Pepe Family Fund
Nina Poeta Scholarship Fund
President’s Fund of the Valley Community Foundation
Sophie and Robert W. Rapp Family Fund
Samuel Rifkin Fund
Leah Rondon Fund
Anthony (Sonny) Savignano Memorial Fund
Dorothy E. & Kenneth E. Schaible Donor Advised Fund
Mary A. Schmecker Turtle Shell Fund
Seymour Public Schools Fund
Shelton CT Gaels Alumni Fund
Marion Shortell and Joseph Meade Fund
Dr. Beth A. Smith Fund
Smythe Family Fund
Stengel Family Fund
Sterling Opera House Endowment Fund
Sally & Dominick Thomas Fund
John Tyma Fund
Uncle Joseph’s Fund
Uncle Louie Fund
Nancy Valentine Fund
Valley Bar Association Memorial and Commemorative Fund
Valley Breast Health Care Fund
Valley Pride Fund
Van Egghen Family Fund
Ted Vartelas Family Fund*
Alphonso and Eulalia Vitello Family Fund
Warchar Family Fund
Katarzyna and Ludwik Zaprzalka Fund
Joe and Judy Zaprzalka Family Fund
John and Laura Zaprzalka Family Fund

Donor Designated Funds
If you want to show your support for a specific organization or organizations during your lifetime or endow your giving to a favorite nonprofit in perpetuity, a Donor Designated Fund allows you to name one or more organizations to receive an annual gift from your fund.

1920 Society Fund
Birmingham Foundation Fund
Edward J. & Marie M. Cecarelli Book Fund
Herbert M. Clark Fund
Cohen Family Book Fund
Edward J. Cotter Jr. Memorial Fund
Angela Curas Fund
D’Addario Family Fund for the Benefit of Griffin Hospital
Derby Public Library - Harold B. Yudkin Historic Preservation Fund
Gerry Hellmann Eckhardt Fund for the Woodbridge Town Library
Harvey and Gerry Eckhardt Fund for the Seymour Oxford Food Bank
First Taxing District and the Mulvoy - Tarlov - Aquino VFW Post 603 Cannon Preservation Fund
Neville Osmond Forsythe Senior Memorial Fund
Griffin Family Memorial Fund
Health Initiative for Men (HiM) Fund
Housatonics Council, BSA Fund
Jones Family Farms Fund for the Connecticut Agricultural Experiment Station
Planetree Fund
Maureen, Megan and Katey Ryan Fund
Gary and Francesca (Riggio) Scarpa Fund for Center Stage Theatre
Dorothy E. & Kenneth E. Schaible Fund for the Boys & Girls Club of the Lower Naugatuck Valley
Seymour-Oxford Rotary Club Fund
Seymour Excellence in Education Fund (SEEF)
Frank and Helene Skoronski Memorial Fund
Donald W. & Lillian C. Smith Family Fund
Sturgis A. and Madeleine Martin Sobin Family Fund
Peter Stamos Fund for the Ansonia Public Library TEAM, Inc., Richard J. Knoll Endowment Fund
Torbi-Saldamarco Family Fund
Emil J. Varga Catholic School Fund
Peter J. Vartelas Invest In Youth Fund #2 for the Valley YMCA
Veterans of Foreign Wars Post 597 Fund
Walsh Family Fund
Henry Shelton Wells and Edith Birdseye Wells Family Fund
Thomas H. and Alyce S. Wells Family Fund*
Colonel Lloyd E. and Joan Platt Witmer Fund
Women In Networking Fund

* New Fund in 2022
Organization Funds

Nonprofit organizations can set up either a permanent Organization Endowment Fund, or an investment-only Organization Fund. Both funds provide a stable source of distributable revenue for the nonprofit.

Anonymous
Agency on Aging Fund at VCF
Ansonia Rotary Club Fund*
Derby Community Endowment Fund
Derby Historical Society Organization Fund
Derby Public Library Endowment Fund
Housatonic Council, BSA Fund
Edmund D. Strang Campership, Housatonic Council, BSA Fund
Edmund & Caroline Strang Eagle Scout Scholarship Award, Housatonic Council, BSA Fund
Edmund D. Strang Scout Reservation Camp Maintenance, Housatonic Council, BSA Fund
Massaro Community Farm Fund
Massaro Farm Legacy Fund
Oak Cliff Cemetery Association Fund
Oxford Land Trust Fund
Parent Child Resource Center Endowment Fund
Plumb Memorial Library Reserve Fund
Plumb Memorial Tri-Centennial Endowment Fund
Recreation Camp Endowment Fund
Ritchie Fund for Plumb Memorial Library
Seymour Pink Endowment Fund
Seymour-Oxford Nursery and Child Care Association, Inc. (SONCCA) Fund
Shelton Historical Society Endowment Fund
Shelton Land Trust Reserve Fund
St. Vincent de Paul of the Valley Fund
Rowland R. Strong and Edith H. Strong Memorial Scholarship Organization Fund
TEAM Legacy Fund
TEAM Reserve Fund
Town of Seymour Endowment Fund
Troop 3 - Derby BSA Alumni & Friends Fund
Valley United Way Fund
Valley YMCA Endowment Fund
Peter J. Vartelas Invest In Youth Fund #1 for the Valley YMCA

Preference Funds

Also known as a field of interest fund, a Preference Fund supports evolving needs and a variety of nonprofits by focusing on broad areas of interest. This fund can support education, childcare, environmental issues, healthcare, or a specific geographic area. The Valley Community Foundation makes grants to nonprofits that serve the donor’s field of interest in perpetuity.

Ancient Order of Hibernians, Derby Division Fund
Cohen Community Fund
Susan Coyle Family Fund
Lawrence J. DeTullio, Jr. Fund
The Future Fund
Herb Rollinson Fund
Shelton Congregational Church Fund
Mary Vartelas Stamos Fund
Angelina M. and Valentina V. Vitali Fund
Selma L. and Harold B. Yudkin Fund

Scholarship Funds

You can help students pursue their educational dreams with a Scholarship Fund. Scholarship funds are often created in honor of someone and can be used to support educational opportunities for students at specific schools.

Michael J. Adanti Scholarship Fund
Joseph ‘Jay’ Amico Artistic Memorial Awards Fund
Ansonia High School Endowed Fund
Ansonia High School Non-Endowed Fund
Ansonia Public Schools Fund
Bruno Battaglino Memorial Fund
Stella Behuniak Fund
Winston J. Bish Memorial Scholarship Fund
John F. Blake, Jr. Memorial Prize Fund
Andy Brennan Memorial Fund*
Rachel and William Brogadir Scholarship Fund
Stanley and Irene Chlebowski Memorial Scholarship Fund
Stephen & Emily Chuckta Memorial Scholarship Fund
Class of 1940 Scholarship Fund
Eddy Conklin Scholarship Fund
Ruth H. Feinberg Connors Principal’s Award
Eleanor Rae DeFelice Scholarship Fund*
Lou and Dolly DeFilippo Scholarship Fund
Rosa Dell’Oso Memorial Scholarship Fund
Derby High School Endowed Scholarship Fund
Derby High School Non-Endowed Scholarship Fund

* New Fund in 2022
Domorod-Youd Shelton High School Scholarship Fund
Capt. Jerry Drugonis Memorial Scholarship Fund
Ellen DuBoff Memorial Scholarship Fund
Agnes and Helen Dubrava Fund
Honorable Joseph P. Flynn and Family Scholarship Fund
Francis Family Fund
Louis ‘Neni’ Gaetano, Sr. DHS Scholarship Fund
Geissler Family Scholarship Fund
Brandon Giordano Football Scholarship Fund
Peter S. Goumas Presidential Scholarship Fund
Mayor Richard A. Grande Memorial Scholarship Fund
Traci L. Haines Memorial Scholarship Fund
Amos Hawley Memorial Award Fund
Arthur Hayes Jr. Memorial Scholarship Fund
Randall R. Holden Memorial Scholarship Fund
Industrial Arts/Vocational Education Fund
Joey’s Way Fund
Wasil Katz Scholarship Fund
Coach Bobby Kelo Memorial Scholarship Fund
Winifred Bennett Kerins Memorial Prize Fund
Patricia M. Kondrath Scholarship Fund
Julia Krizan Scholarship Fund for the Arts
Russel & Joanne Kiley Kulawiz Fund
Frank J. Lang Fund
Anthony and Catherine LoPresti Family Fund*
Jesse McCord Lewis Memorial Scholarship Fund
Michael R. McMahon Scholarship Fund
Dr. Carol Merlone Scholarship Fund
Luke Moseley Aviation Scholarship Fund
Bernice Nicolari-Howard Gura Award Fund
Louis L. Nicoletti, Sr. Business Scholarship Fund
Anna and John O’Neil Memorial For Integrity Award Fund
Anthony Pagliaro Scholarship Fund
Lillian Pawlowski Fund
Ann C. Petro Scholarship Fund
Pam Petro Pawlowski Scholarship Fund
Joseph E. Potter Memorial Fund
John Quake Memorial Fund
Michael J. Regan Scholarship Fund
George and Beatrice Ryan Scholarship Fund
V. Gerald Ryan Scholarship Fund
John Sabulis Memorial Scholarship Fund
Norman K. and Janet N. Santa Fund
Seymour Historical Society Scholarship Fund
Shelton High School Endowed Scholarship Fund
Shelton High School Non-Endowed Scholarship Fund
Shelton High School Education Fund
Dr. Teresa Tottenham Sievers Scholarship Fund*
Gaeton and Elizabeth Simonetti Family Fund
Frank and Helene Skoronski Memorial Fund
Charles P. Smith Jr., Scholarship Fund
Karen R. Stanek Memorial Scholarship Fund
Rowland R. Strong and Edith H. Strong Memorial Renewable Scholarship Fund
Howard Tassitano Fund
Julian A. Taylor Scholarship Fund
Margaret Ann Kofarago Thomas Memorial Scholarship Fund
John ‘AL’ Tiano Scholarship Fund
George Vartelas Ansonia High School Scholarship Fund
Peter Vartelas Ansonia High School Scholarship Fund
John J. Wabuda Memorial Scholarship Fund
Joseph and Pauline Warichar Memorial Scholarship Fund
Alexander George Wilson, Sr. Scholarship Fund
Anne M. and Vincent J. Zak Memorial Scholarship Fund

**Unrestricted Funds**

You can help support emerging issues and the most pressing needs in the Valley by creating an Unrestricted Fund. As the need in our community is ever-changing, unrestricted funds allow the Valley Community Foundation flexibility to prioritize and address high-priority issues.

Holy Trinity Greek Orthodox Church of Ansonia Fund
Raymond F. Mackowski Fund
Ortoli Family Fund
Dorothy E. & Kenneth E. Schable Community Fund
Valley Community Fund
VCF Administrative and Reserve Fund

* New Fund in 2022
In the town of Seymour, Robert “Bob” Lang was a community icon. The respected teacher and softball enthusiast was as well-known and beloved as any native son could be. His 36-year teaching career in Seymour touched the lives of countless students and his passion for promoting and coaching girls and women’s softball led to many honors and accolades recognizing him as a pioneer of the sport.

When Bob passed away last year, he left the bulk of his estate to support sports programs in Seymour dear to him and his late brother, Frank. Frank, who passed away in 2011, also loved Seymour, and loved sports, especially running. The Frank J. Lang Fund supports scholarships in Seymour for students who participate in track, and the Robert C. Lang Fund supports softball programs in Seymour.

Bob’s passion for softball started in the 1950s, first as a fan of the women’s fast-pitch team, the Stratford Brakettes, then in the 1970s, as a volunteer for the George J. Hummel Little League (GJHLL) organization. He helped build the GJHLL program and served as its commissioner right up until his passing. Bob was also head coach of his beloved Red Devils for more than 40 years.

The Lang brothers had no direct heirs, so when Frank passed away, he left his estate to Bob and when Bob passed last year, he left his estate to the funds. Bob truly trusted VCF and respected its mission and he made sure in his will he would contribute to his beloved Seymour after he was gone.

“To Bob and Frank, the Town of Seymour was essentially their family, their heirs,” said Sharon Closius, VCF President and CEO. “It’s a wonderful thing, the kids of Seymour who benefit from these funds are really their heirs.”

The Gates Society is a close circle of supporters who share a special love and appreciation for this region and its people, by making a planned philanthropic commitment to the Valley through VCF. It’s named in honor of Ross and Frank Gates, the brothers of a prominent Derby family, who in 1938, created trusts to benefit the Valley.

You can establish a testamentary fund agreement with VCF during your lifetime and fund it upon your death. The benefit is you will have met with the foundation staff and set up a solid plan to make sure all your charitable wishes are fulfilled, and you can specifically name the fund in your will or estate plan. This option permits you to change your philanthropic goals without needing to change your will.

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**GATES SOCIETY MEMBERS**

**MEMBERSHIP AS OF DECEMBER 31, 2022**

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<th>Anonymous (4)</th>
<th>Michael Hyder*</th>
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<td>Dayne &amp; Dawn Bachmann</td>
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* Deceased
**Donors of the Valley Community Foundation**

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Dorothy Gleason
GLP Hernandez HVAC Services, LLC
Deborah Gogliettino
Darren & Christina Gonsalves
Joseph Gordon
Gregg Goumas
Diane Grabowski
Krista Grande
Nancie Gray
John Greene
Richard & Patricia Greene
Lara Green-Kazlauskas
James & Karen Greenwood
Peter Gribben
Chris Grizzle
Mary Ann Groves
Howard & Judy Gura
Melissa Haas
Frank Haines
Teri Haines
Gaye Harfenist
Mark & Virginia Harger
Katie Hargett
Ralph & Lynne Harrison
Michael Healey
F.F. Heath
Doug & Margaret Herdt
Kurt & Carmel Heim
James Holland
Katrina Holden
John Holt
Gail Honychurch
Rebecca Hopkins
Sara Hopkins
Housatonic Council, BSA
Charles Householder
Charlene Hron
Mary & Wayne Hugli
George Hyman, Jr.
IBM Employee Services Center
Roneil Icatar
Imports Unlimited
Barbara Fanning Iorillo
John & Madelyn Izzo
Stephanie Johnson
Zoe Johnson
Jones Family Farms, LLC
David & Nancy Judd
Julian A. Taylor Scholarship
Fund Committee
Michelle Kachmarck
Frederic Kaeser
Phyllis Kalletsky

Harriet Karkut
Katherine Keeney
Jean Kellogg
Deborah Kelo
M. Elizabeth Kennard
David Kennedy
David Keyser
Margaret Kish
Sandra Knowles
Paul & Sherry Konwerski
Peter Konwerski & Leah Rosen
David Koprowski
Barbara Kostopoulos
Patricia Kostopoulos
William & Kathryn Kozak
Justin Kozlowski
Barbara Krayeske
Frank & Paula Krupansky
Camille Kurtyka
Diana & James Kurz
Wayne & Ellen Landry
Edward & Laura Lane
James Lane
Estate of Robert Lang
Antonetta Lavorgna
Luigi & Justine Lavorgna
Law Office of Gregory Stamos
Jake Layman
James Leach & Carol Salem
Judith Lee
Legends of Fear LLC
Domenico & Antoinette Lemma
Barbara Lenart
Joseph & Christine Lesko
Eric Levesque
Alberto Llanos
Barbara Lombardi
Seas LoPresti
Kristen Lott
James & Halina Loukakes
Cathleen Lynch
Jean Lynch
Tara-Marie Lynch
William & Judi Lynch
MaryEllen Mackinnon
Ioanna Madigosky
Robert & Jennifer Magri
Kathleen Malerba
Lulis & Jennifer Malta
Leonard & Laureen Marazzi
Kenneth & Judy Ann Marcucio
Victor & Claudia Marques
Arthur Martin

Susan Martin
David Mason
Gerald Matusovich
Madelyn Mayo
Brian McArdle & Eleni
Koutroumanis McArdle
George & Elaine McCabe
Haley McCormack
Tim McDonough
Pat McGrath
Jan McLean
Lorraine McLeish
Bob & Lucy McLellan
Felicia McPhail
Renee Mehaffey
Christian & Barbara Mendes
Gary & Carol Merlone
MaryAnn Meyer
Assunta Michaud
Priscilla Michaud
Raymond & Marilyn Michaud
Kayleigh Mihalko
Kurt Miller
Miller-Ward Funeral Home, LLC
Alota Miner
Albert Misiewicz
George Mitchell
Mobilo & Son HVAC
Carol Mobilo
Franco & Silvana Monaco
Danielle Montecalvo
Michael & Claudia Montecalvo
Paul Mortensen
James & Kathleen Murphy
Karen Murphy
Ryan & Lindsey Murphy
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Mark & Pamela Neuendorf
Judy Nicolari
Elizabeth Nicoletti
William Nimons
Nolan Family Living Trust
Veronica O’Brien
George O’Mara
Cary Yeh & Lynn O’Neil
Ray & Deb Oppel
Patricia Oram
Order of the Eastern Star - Olive Chapter
Fred Ortoli
Belinda Pagliaro
Elaine Pagliaro
Joseph A. Pagliaro, Jr.
Louise Pagliaro
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<td>Angelo &amp; Rosalinda Spinelli</td>
<td>Dianna Weymer</td>
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<td>Pat Tarasovic</td>
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Community Investment

Our mission is to make the Valley a better place to live and work, both now and in the future, by connecting private philanthropy to the long-term public good of the Valley.

This data reflects discretionary grants made through the Responsive (New and Multi-year), Needs and Opportunities, Sponsorship, and Community Grants programs. It does not include $105,000 in community initiative support. These grant programs would not be possible without the significant financial and staffing contributions provided by our partner in philanthropy, the Community Foundation for Greater New Haven.

<table>
<thead>
<tr>
<th>Type of Funds</th>
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<th>Assets</th>
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Responsive Grants

The Valley Community Foundation’s annual Responsive Grants program is open to requests for organizational support and projects that serve Ansonia, Derby, Oxford, Seymour and/or Shelton. Due to the continued impact of the COVID-19 pandemic, these grants were all awarded to address each nonprofit’s general operating support needs. All grants, except those with an asterisk, represent multi-year support.

Center Stage Theatre* - To provide general operating support for its summer youth program, adaptive technology for its hearing-impaired patrons, and to fund an outreach coordinator to assist in meeting its mission of building community one performance at a time. $35,000

Christ Episcopal Church – To provide general operating support for the operations of the Kathleen Samela Food Bank. $96,000

Echo Hose Hook and Ladder Volunteer Ambulance Corps – To provide general operating support to increase its number of on-duty ambulances. $105,000

Life Health and Wellness Center* – To provide general operating support to fund a part time head teacher, upgrades to its playground equipment, and enhancements to its website. $60,000

Shelton Economic Development Corporation – To provide general operating support and help the Corporation continue to serve as a catalyst for growth both in Shelton and the Valley region. $45,000

Valley Council for Health and Human Services* – To provide general operating support for the Council to deepen its collaborative work by engaging with a consultant to strengthen planning efforts to effectively implement a collective impact model. $40,000

Valley Shakespeare Festival – To provide general operating support to continue to offer the Free Shakespeare in the Park series, as well as an opportunity to expand its offerings into additional Valley venues. $60,000

Needs and Opportunities

Needs and Opportunities grants range from $250 to $10,000 and are designed to promptly address the needs of Valley nonprofits through a simplified application process.

Best Buddies Connecticut – To support the Virtual School Friendship and Social Inclusion Programs for students with intellectual and developmental disabilities in Derby, Oxford, Seymour, and Shelton. $5,000

cARTie – To support mobile art museum programming for Valley students. $10,000

Connecticut Institute for Social Entrepreneurship – To provide support for immigrant and black-owned business entrepreneurs in the Valley. $3,073

Derby Historical Society – To provide support for upgrades to its Derby campus. $9,000

Girl Scouts of Connecticut Inc. – To support construction costs of a new accessible bathroom and changing rooms at Camp An-Se-Ox in Oxford. $10,000

Huntington Congregational Church – To provide support for the Valley Refugee and Resettlement Project. $5,000

Master’s Table Community Meals, Inc. – To support consulting services to create a strategic and financial plan. $5,000

Mishkan Israel Day Camp – To support a summer day camp season for underprivileged children from the Valley. $1,400
Naugatuck Valley Health District - To provide radon kits and radon awareness to Valley residents in need. $3,000

New Haven Symphony Orchestra – To provide support for the Valley Pops Concert Series. $10,000

Operation Fuel, Inc. - To support emergency energy assistance to families living in Ansonia, Derby, Oxford, Seymour, and Shelton. $10,000

Read to Grow - To bring its bookmobile to the Valley. $5,100

Sustainable CT – To support a summer Fellow at the Naugatuck Valley Council of Governments for work in the Valley region. $2,000

The Christian Counseling Center – To support consulting services to help implement agreed changes as part of the COVID-19 Recovery Process. $10,000

The Emergent Leaders HBCU/Civil Rights Tour Fundraising Committee - To support a group of 15 emerging Ansonia High School student leaders tour of Historically Black Colleges and Universities and civil rights landmarks in AL and GA. $10,000

The Hometown Foundation – To support the annual HungerLESS Holidays Program in the Valley. $5,300

Transportation Assistance for Low-Income Families – To provide support for low-income individuals in need of transportation to retain their first job. $5,000

UR Community Cares – To provide volunteer services to seniors and disabled adults in the Valley. $2,500

Valley Save Our Youth – To provide general operating support and services for marginalized Valley youth. $10,000

**Community Grants**

This application process recognizes smaller, volunteer or neighborhood groups with grant awards of up to $2,500.

**All-America Valley Basketball Club** - To support the club’s participation in an 11-week competitive basketball tournament. $2,500

**Annual Thanksgiving Basket Committee** - To support the purchase of perishable and non-perishable food items and supplies for distribution of Thanksgiving baskets to families in need. $2,500

**Ansonia Rotary Club** - To support the merge of both Ansonia and Seymour-Oxford Rotary Clubs into one new, larger Rotary Club. $2,430

**Boy Scout Troop 3 Derby** - To support leadership opportunities for Troop 3 participants to work with their brother organizations in England and Ireland. $2,500

**cARTie** - To support an intern to assist in getting art to underserved Valley youth. $2,470

**Derby High School Beekeepers** - To support a beekeeping club at Derby High School. $2,500

**Irving School Food Pantry** - To support a food pantry for Irving School families. $2,500

**The Richi-Dee’s BBQ Table Project** – To support children ages 5-16 with opportunities to assist their community through baking and other activities. $1,200

**Seymour Soccer Association** - To support an adaptive program where aurotypical children or children with other development needs, who can’t participate in standard youth soccer have the opportunity to learn the sport of soccer. $2,500
Shelton Farmers Market - To support the Shelton Farmers Market and Valley Sprouts programs. **$2,400**

Southford Falls Quilting Guild - To support the “heart of quilting” which reuses, recycles, and repurposes fabric waste (scraps) for new uses, attract new membership, practice, and teach sustainability in quality, and hire a professional to run AV equipment for hybrid meetings. **$2,500**

Trinity Episcopal Church – To support the upgrading of the Church’s kitchen to provide meals for Valley residents in need. **$2,500**

Valley Historical Research Committee - To support the digital replication and restoration of the earliest known map of Derby (1852). **$1,500**

**Sponsorship Grants**

Nonprofit organizations can apply for support from VCF for up to $2,500 for special events, especially those events that inform the community about a particular cause.

Adam Wysota Foundation – To sponsor the annual Dancing with the Stars benefit. **$1,000**

American Legion, Emil Senger Post 10 – To sponsor a student to participate in its annual Boys’ State Program. **$350**

American Legion, Sutter-Terlizzi Post 16 – To sponsor the Fallen Heroes Memorial. **$2,500**

BHcare – To sponsor its annual Rise and Shine event. **$2,000**

BOSOMii – To sponsor its third annual Shine event. **$500**

Boy Scout Troop 3 – To sponsor the 96th Annual Scout Gang Show. **$500**

Boys & Girls Club of the Lower Naugatuck Valley – To sponsor the 20th Commodore Hull Thanksgiving Day 5K Road Race. **$2,500**

Celebrate Shelton – To sponsor its 2022 Calendar of Events. **$2,500**

Connecticut Women’s Consortium – To sponsor Valley participants’ attendance at its second biennial Trauma and Recovery Conference. **$950**

Derby High School – To sponsor Hispanic Heritage Month. **$2,000**

Derby High School PTO – To sponsor a post prom event. **$750**

Derby Shelton Rotary – To sponsor Flags for Heroes. **$500**

Echo Hose Hook and Ladder Ambulance Corps – To sponsor its Slice of Shelton event. **$1,000**

Friends of the Ansonia Nature Center (FANCI) – To sponsor its annual Earth Day event. **$1,000**

Griffin Hospital – To sponsor its annual gala. **$1,000**

Junior Achievement of Greater Fairfield County - To sponsor a virtual interactive career fair. **$1,000**

- To sponsor the 21st annual golf invitational. **$500**

New Haven Symphony – To sponsor its annual gala. **$1,000**

Northeast Organic Farming Association of Connecticut – To sponsor its 40th winter conference. **$500**

Oxford High School Booster Club 
- To sponsor a senior class lockdown for fun event. **$750**
- To sponsor Take a Stand Day. **$600**

Seymour Historical Society – To sponsor the 2022-2023 Educational Speakers Series. **$1,250**
Seymour Pink - To sponsor the 11th Annual Pounding the Pavement for Pink live and virtual 5K run/walk. $2,500

Shelton Historical Society – To sponsor its 2022 Valley Antique Car Show and Harvest Festival. $1,500

TEAM, Inc.
- To sponsor its 57th Annual Meeting. $1,000
- To sponsor the annual Toys4Kids drive. $1,000
- To sponsor Men Who Cook. $500

Valley Parish Nurses - To sponsor its annual Family Safety Fair. $1,250

Unrestricted and Preference Funds

Unrestricted and Preference Funds allow the VCF Board of Directors to address a pressing need of an organization or community.

Scholarships

Scholarship Funds provide awards and scholarships to students chosen through a selection process at individual high schools, elementary schools, or community organizations.

- Academy of Our Lady of Mercy, Lauralton Hall
- American International College
- Amity Regional High School
- Ansonia High School
- Assumption School
- Bassick High School
- Boys & Girls Club of the Lower Naugatuck Valley
- Bunnell High School
- Culinary Institute of America
- Derby High School
- Derby Public Schools
- Emmett O’Brien Regional Technical School
- Hamden High School
- Johnson and Wales University
- Oxford High School
- Oxford Middle School
- Rochester Institute of Technology
- Sacred Heart University
- Seymour High School
- Shelton High School
- Southern Connecticut State University
- Trumbull High School
- University of Connecticut
- University of New Haven
- University of Rhode Island
- University of Vermont
- West Haven High School
- Western Connecticut State University
Designated Grants and Organizational Fund Transfers

Designated Funds are established by a donor(s) to benefit one or more specific nonprofit(s). In addition, VCF manages the endowment and reserve funds of several local nonprofit organizations.

Ansonia High School
Ansonia Public Library
Ansonia Public Schools
Assumption Church
Assumption School
Boy Scouts of America, Troop 43
Boys & Girls Club of the Lower Naugatuck Valley
Center Stage Theatre, Inc.
Central Connecticut Coast YMCA
Connecticut Agricultural Experiment Station
Derby Neck Library
Derby Public Library
Emmett O’Brien Regional Technical School
Greater Valley Chamber of Commerce
Griffin Hospital
Griffin Hospital Development Fund
Housatonic Council, Boy Scouts of America
Lower Naugatuck Valley Parent Child Resource Center
Massaro Community Farm, Inc.
Oak Cliff Cemetery Association
Our Lady Queen of the Apostles Parish
Oxford High School
Planetree, a Subsidiary of Griffin Health Services, Inc.
Plumb Memorial Library
Recreation Camp, Inc.
Rotary Club of Ansonia, Seymour, and Oxford, CT
Rowland R. Strong & Edith H. Strong Memorial Scholarship Fund
Seymour Oxford Food Bank
Seymour Pink, Inc.
Shelton High School
Shelton Historical Society
Shelton Public Schools
Storm Engine Company Ambulance Corps, Inc.
TEAM, Inc.

Donor Advised Grants

Grants from Donor Advised Funds are approved by the VCF Board of Directors upon the request and with the participation of the Donor. Donor Advised Funds are one of the many ways fund holders can advise on an area they are passionate about while partnering with VCF to make an impact.

The Culinary Institute of America
The Kennedy Collective
Town of Seymour
Treasurer, City of Derby
Trinity Cemetery Association
Trinity Episcopal Church
Valley Community Foundation, Inc.
Valley United Way
Valley YMCA
Woodbridge Town Library

A More Balanced World
Adam Wysota Foundation
ALS Association, Connecticut Chapter
American Farmland Trust
American Legion, Sutter-Terlizzi Post 16
American Red Cross, Connecticut Chapter
Ansonia High School
Ansonia Public Schools
Ansonia Rescue Medical Services
Area Congregations Together, Inc.
Beth-El Center, Inc.
Bethany Library Association
BHcare
Boy Scout Troop 3 Derby
Boy Scouts of America, Troop 34
Boys & Girls Club of Milford
Boys & Girls Club of the Lower Naugatuck Valley
Bridgeport Animal Rescue Crew of Connecticut
Capri Christian Church
Catherine Violet Hubbard Foundation
Center Stage Theatre, Inc.
Central Connecticut Coast YMCA
Children’s Hospital of Philadelphia
Clifford Beers Community Care Center
CoCo’s Animal Rescue Efforts of Seymour
Common Cause
Common Ground High School
Community Hope Center
Connecticut Burns Care Foundation
Connecticut Farmland Trust
Connecticut Forest & Park Association
Connecticut Hospice, Inc.
Connecticut Veterans Legal Center
Cub Scout Pack 3
Derby Historical Society
Derby Public Library
Derby Running Club
Echo Hose Hook and Ladder Volunteer Ambulance Corps, Inc.
Elena’s Light
The Emergent Leaders HBCU/ Civil Rights Tour Fundraising Com
The Foundation School
Frances Perkins Center
Friends of the Ansonia Nature Center
Girl Scouts of Connecticut Inc.
Greater Valley Chamber of Commerce
Green Village Initiative
Griffin Hospital
Griffin Hospital Development Fund
Housatonic Council, Boy Scouts of America
Huntington Congregational Church
Huntington United Methodist Church
Integrated Refugee & Immigrant Services
Junior Achievement of Greater Fairfield County
Literacy Volunteers of Southern Connecticut
Lower Naugatuck Valley Parent Child Resource Center
Massaro Community Farm, Inc.
Master’s Table Community Meals, Inc.
Mishkan Israel Day Camp

National Right to Work Legal Defense and Education Foundation, Inc.
Northeast Organic Farming Association of Connecticut, Inc.
Our Daily Bread Food Pantry
Planned Parenthood of Southern New England
Read to Grow
Recreation Camp, Inc.
Ronald McDonald House of Connecticut
Yale New Haven Hospital-Saint Raphael Campus
Salvation Army, Greater Valley Corps
Save the Sound
Seymour High School
Seymour Pink, Inc.
Shelburne Farms
Shelton Economic Development Corporation
Shelton High School
Shelton Historical Society
St. Mary St. Michael School
St. Vincent de Paul of the Valley
Storm Engine Company Ambulance Corps, Inc.
Susanna Wesley School
St. Vincent’s Medical Center - Swim Across the Sound TEAM, Inc.
Traveler on a Mission
Troop 3 - Derby BSA Alumni & Friends Foundation, Inc.
University of Connecticut Foundation, Inc.
University of Nebraska Foundation
University of New Haven
University of New Hampshire
The Valley Independent Sentinel
Valley United Way
Valley YMCA
West Haven Veteran’s Museum and Learning Center
Stewardship of Charitable Assets

The Valley Community Foundation (VCF) and The Community Foundation for Greater New Haven (TCF) have been affiliated for the past 18 years, and the assets entrusted to VCF since 2004 have been invested and managed by TCF. Access to TCF’s commingled investment management program affords VCF funds the benefits of a globally diverse, long-term endowment model by providing direct access to more than 48 world-class institutional investment managers specializing in more than seven distinct and differentiated asset classes and strategies.

Although equity markets finished the year with a strong rally with the S&P 500 up 7.6% in the 4th quarter, the 2022 markets still suffered one of their worst outcomes in decades. Despite that strong 4th quarter, the S&P finished the year down 18.1% — the worst outcome in 14 years.

Driving much of the market vacillations throughout the 2022 was the higher interest rate environment, as the market tried to price inflation and position for a wide range of economic uncertainties. The Federal Reserve remains steadfast in the need for higher rates to fight inflation, which has peaked in the near-term and retreated significantly from its recent highs, and the market has already begun to price in rate cuts later in 2023. Geopolitical pressures remain high especially as it pertains to Russia, although recently China has begun to distance themselves more vocally.

In 2022, VCF’s total return was down 12.6%. The generic traditional 60/40 asset allocation model was down 16.0%, its worst performance in nearly a century and only surpassed on two occasions, both of which occurred in the 1930s. While 2022 was a very tumultuous year, the Corporation’s Commingled Fund remained well-positioned and diversified in a variety of asset classes, strategies, and geographies.

As displayed in the chart, the annualized net return of the Commingled Fund even during these more difficult periods exceed the market benchmark over all time periods ended December, 2022. The Commingled Fund also benchmarks its performance against the Endowment and Foundation peer group, which has resulted in the performance being in the top half of this national study in each of the last 10 years ended December, 2022.

<table>
<thead>
<tr>
<th>Periods ended 31 December 2022</th>
<th>Trailing 1 Year</th>
<th>Trailing 3 Years</th>
<th>Trailing 5 Years</th>
<th>Trailing 7 Years</th>
<th>Trailing 10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Results (net of expenses)</td>
<td>(12.6)</td>
<td>3.7</td>
<td>4.4</td>
<td>6.3</td>
<td>7.4</td>
</tr>
<tr>
<td>Market Benchmark1</td>
<td>(13.2)</td>
<td>3.4</td>
<td>4.1</td>
<td>5.9</td>
<td>6.0</td>
</tr>
<tr>
<td>Value Added (annually)</td>
<td>0.6</td>
<td>0.3</td>
<td>0.3</td>
<td>0.4</td>
<td>1.4</td>
</tr>
</tbody>
</table>

1. The market benchmark is equal to the rate of return produced by specific market indices representing the asset classes contained in the asset allocation model, with such market indices weighted in accordance with that model.

Past performance is no indication of future results. The Commingled Fund is managed by The Community Foundation for Greater New Haven, Inc., which is a Connecticut Registered Investment Adviser.
### Financial Position

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$760,890</td>
<td>$1,037,433</td>
</tr>
<tr>
<td>Investments at market value – component funds</td>
<td>19,580,020</td>
<td>22,681,961</td>
</tr>
<tr>
<td>Investments at market value – organization funds</td>
<td>10,815,008</td>
<td>12,363,051</td>
</tr>
<tr>
<td><strong>Total Investments</strong></td>
<td><strong>31,151,918</strong></td>
<td><strong>36,082,445</strong></td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>789,923</td>
<td>72,000</td>
</tr>
<tr>
<td>Other assets</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Furniture and equipment, net</td>
<td>28,571</td>
<td>37,249</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$31,974,412</strong></td>
<td><strong>$36,191,694</strong></td>
</tr>
<tr>
<td><strong>Liabilities</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$84,888</td>
<td>$64,214</td>
</tr>
<tr>
<td>Organization funds</td>
<td>10,815,008</td>
<td>12,363,051</td>
</tr>
<tr>
<td>Grants payable</td>
<td>74,355</td>
<td>84,941</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>10,974,251</strong></td>
<td><strong>12,512,206</strong></td>
</tr>
<tr>
<td><strong>Net Assets Without Restriction</strong></td>
<td>21,000,161</td>
<td>23,679,488</td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$31,974,412</strong></td>
<td><strong>$36,191,694</strong></td>
</tr>
</tbody>
</table>

### Statement of Activities

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue, Gains and Other Support</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$3,221,082</td>
<td>$3,740,512</td>
</tr>
<tr>
<td>Less: contributions to organization funds</td>
<td>(602,195)</td>
<td>(1,771,873)</td>
</tr>
<tr>
<td>Net contributions</td>
<td>2,618,887</td>
<td>1,968,639</td>
</tr>
<tr>
<td>Investment gain (loss), net</td>
<td>(2,612,112)</td>
<td>1,762,330</td>
</tr>
<tr>
<td><strong>Total revenue, gains and other support</strong></td>
<td><strong>$6,775</strong></td>
<td><strong>$3,730,969</strong></td>
</tr>
<tr>
<td><strong>Expense</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants and distributions approved, net</td>
<td>$2,424,667</td>
<td>$1,973,432</td>
</tr>
<tr>
<td>Less: grants from organization funds</td>
<td>(496,864)</td>
<td>(208,043)</td>
</tr>
<tr>
<td>Net grant expense</td>
<td>1,927,803</td>
<td>1,765,389</td>
</tr>
<tr>
<td>Grants for program management and direct charitable activities</td>
<td>492,894</td>
<td>401,285</td>
</tr>
<tr>
<td>Net grant and program expense</td>
<td>2,420,697</td>
<td>2,166,674</td>
</tr>
<tr>
<td>Development, donor services and fund stewardship</td>
<td>151,660</td>
<td>167,208</td>
</tr>
<tr>
<td>Financial management, leadership, and operations</td>
<td>113,745</td>
<td>100,323</td>
</tr>
<tr>
<td>Total administration expense</td>
<td>265,405</td>
<td>267,531</td>
</tr>
<tr>
<td><strong>Total expense</strong></td>
<td><strong>$2,686,102</strong></td>
<td><strong>$2,434,205</strong></td>
</tr>
<tr>
<td>Increase (decrease) in net assets</td>
<td>(2,679,327)</td>
<td>1,296,764</td>
</tr>
<tr>
<td>Net assets – Beginning of year</td>
<td>23,679,488</td>
<td>22,382,764</td>
</tr>
<tr>
<td><strong>Net assets – End of year</strong></td>
<td><strong>$21,000,161</strong></td>
<td><strong>$23,679,488</strong></td>
</tr>
</tbody>
</table>
The Great Give

The 2022 Great Give lived up to its name again last year, raising more than $3.4 million for a record number 510 nonprofits in the Valley and Greater New Haven area. Forty-seven Valley-based nonprofits were part of this success, raising nearly $433,000 for organizations in Ansonia, Derby, Oxford, Seymour, and Shelton.

The 36-hour live online giving event was started in 2010 by The Community Foundation for Greater New Haven (TCF) to promote local philanthropy and support area nonprofits. In the last 13 years, The Great Give has helped raise more than $21 million for nonprofits throughout the region.

In 2022, Valley residents, employees, and Valley Community Foundation (VCF) donor-advised fundholders gave more than $360,000 to support more than 250 organizations throughout the region. A total of 2,010 gifts were made by 1,153 donors who live or work in the Valley.

“Valley donors give generously, even outside the Valley,” said Jackie Downing, TCF’s Senior Director of Grantmaking and Nonprofit Support. “It’s always a thrill to see how Valley residents, and people connected to the Valley, love showing their support for the region during The Great Give.”

The 2022 Great Give also featured more sponsors than ever, contributing a total of $268,500 in cash prizes and matching donations to different service sectors and organizations in different regions. VCF donated $20,000 in matching gifts made by Valley donors and $5,000 in special prizes. TCF provided a $100,000 pool for a pro-rated match for every donation received.

“The robust campaign was evidence of the Valley’s commitment and generosity to the region,” said Sharon Closius, VCF’s President and CEO. “We can’t thank Great Give supporters enough. They truly make a positive impact on the community.”
2022 Staff, Councils, Committees, and Volunteers

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Beth Colette
Wendy Gamba
Valerie Knight-Di Gangi
David Rivera
Victoria Vilaysane

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Janice Sheehy
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Aleta Miner
Diane Stroman
Jack Walsh

Mission Related Investment Committee
Jack Walsh, Chair
Aleta Miner
Ray Oppel
Diane Stroman
Alan Tyma

The Valley Community Foundation (VCF) thanks the following for their help in creating this annual report:

Nicole Fitzgerald of iDesign-Studio, Keno Graphics, Fred Ortoli Photography, all the Valley organizations that shared photos, and all the VCF staff for compiling, writing, and creating its content.

VCF thanks the following outgoing Board Members:

Jennifer Magri
Diane Stroman

Partners in Philanthropy
The Valley Community Foundation (VCF) partners with The Community Foundation for Greater New Haven (TCF) to carry out its mission in Ansonia, Derby, Oxford, Seymour, and Shelton. This relationship provides VCF with access to the strength of TCF, which was established in 1928 and is one of the oldest and largest community foundations in the United States and remains the largest grant-maker to nonprofits serving a twenty-town region in the heart of central Connecticut. VCF shares a CFO and uses TCF’s investment expertise, programming, and development knowledge. This strong relationship provides VCF with an immediate support structure that allows its Board of Directors to focus on leadership and development. VCF wishes to thank The Community Foundation for Greater New Haven staff and all the volunteers for their time, contributions, and expertise.
“All these funds represent the selfless nature of the residents of our Valley. The people and families who established these funds come from a variety of backgrounds and experiences, but their investment in the future and love for the Valley is what unites them and unites us all.”