



Compass Points

Steering the Course for Community Investment

Watershed Association, Community Foundation Bridge Borders

The members of Wood Pawcatuck Watershed Association (WPWA) know that nature is tamed by few boundaries. Rivers that wind their way through Rhode Island also pass through parts of Connecticut, and concern for the watershed doesn't stop at the state line.



▲ View from the Boom Bridge access

\$25,000 pledge in honor of Mitch and Betty Salomon, two long time proponents of conservation.

The pledge, earmarked for the organization's endowment, must be used to encourage cooperation between municipalities that manage the watershed. "One of our challenges is that the watershed is in different towns, all with their own laws and regulations," says WPWA Executive Director Lori Urso. The new fund helps the WPWA provide educational outreach programs to town planners, resulting in consistent groundwater regulations and a healthier watershed.

Since the pledge required the WPWA to match the amount, Urso looked for ways to stretch her dollars. She found a solution at The Community Foundation.

"We were exploring our options, and The Foundation turned out to be a

That's why the Hope Valley, Rhode Island-based WPWA turned to The Community Foundation for help in growing its endowment. The WPWA seeks to preserve, protect, and promote the waters of the Pawcatuck Watershed. In 2001, the organization received an anonymous

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A Message from the Chair of the Board of Trustees

The Community Foundation of Southeastern Connecticut has established a firm base, and now the Board believes it's time to build on that base. In its relatively brief existence The Community Foundation has become one of the most significant foundations in Southeastern Connecticut, granting approximately \$1,000,000 in scholarships and grants annually. Even with the inevitable downturn in its endowment as a result of the stock market slump, The Foundation remains a vital and important force for change in our community. It has a first rate staff, headed by Alice Fitzpatrick, and a reputation for integrity and independence. It has launched an immensely successful Women & Girls Fund and has recently undertaken an important Education Initiative. However, for all its success, The Foundation remains something of a secret in Southeastern Connecticut. The Board, in its annual survey in the fall, identified increasing the visibility of The Foundation as the major objective for the year.

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Watershed Association

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good fit," says WPWA Executive Director Lori Urso. The group was able to take advantage of The Foundation's matching funds for organizations seeking to establish or strengthen their endowment. In addition, WPWA was attracted by The Foundation's ability to manage the WPWA-Mitch and Betty Salomon Fund as part of its larger endowment, taking advantage of a sound investment policy designed for long term growth. It means that the Fund will provide much needed revenue for the WPWA in perpetuity.

"The watershed ignores political boundaries," Urso says. "And Connecticut areas like North Stonington and Stonington play an important part in its health. We are pleased to be a part of this cooperative partnership that benefits citizens and the environment for this and future generations." *

A Message from the Chair of the Board of Trustees

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Accordingly, we are focusing on three groups: Our donors, to make sure they know all the approaches The Foundation can give them for helping the community; professional advisors, such as accountants and lawyers, to make them aware of all of the vehicles for giving and the benefits The Foundation offers their clients; and emerging community leaders who can work and grow with The Foundation in the years ahead for the benefit of the whole community.

The Community Foundation offers one of the most flexible and secure means for carrying out charitable giving. It allows individuals of moderate and substantial means alike to make an impression on and a lasting gift to their community. We as a Board need to make sure more people are aware of this opportunity.

We hope you will continue to grow with us as we make an even greater impact on Southeastern Connecticut. Help us spread the word to others that The Foundation can help them with their charitable giving intentions. As partners, we can be a truly powerful force for good.

Tim Bates



▲ *At the 2002 Annual Meeting in November, four retiring Board members were recognized for their years of tireless service. Pictured here is President George Willauer with new chair, Tim Bates. Also recognized were Secretary Ellen McGuire, Tom McGarry and Koko Gildersleeve. Four new trustees were elected to three year terms: Anthony Enders of Waterford, Sakina King of New London, Granville Morris of East Lyme and Dyanne Rafal of Old Lyme. Additional new officers include Bridget Baird as Vice-Chair, Marc Ginsberg as Treasurer and Ruth Saunders as Secretary.*

A Message from the President

In November 2002, The Community Foundation celebrated its 20th anniversary by inviting many of its grantees to showcase their programs for an audience of trustees, donors and friends of the Foundation. It was a festive Nonprofit Fair held in Mitchell College's auditorium with elaborate displays of starfish and wild animals, life-size sculpture, a Baby-Think-It-Over doll, a sailboat, science experiments and energetic dancers. The range of enriching programs was breathtaking!

In 20 years, the Foundation has grown to approximately \$20 million in assets. It has distributed more than \$8 million in grants and scholarships. It has benefited from the leadership of nearly 150 community trustees. It has acquired its own centrally located headquarters building to house its professional staff of five.

At the Annual Meeting, Lew Feldstein, president of the New Hampshire Charitable Foundation, spoke inspirationally of the importance of building social capital within our communities. Our Foundation is fulfilling the elegant vision of its founders by creating a community where we all can flourish by attracting the generosity of many caring individuals to bolster the strength of local institutions and initiatives.

If we can help you work toward making good things happen in our community, please call us.

Alice Fitzpatrick

Call for E-mail addresses

The Community Foundation invites you to join its e-news mailing list if you would like to receive news, invitations and other Foundation communications by e-mail. Please be assured that, like your regular mailing address, your e-mail address will be kept confidential and used strictly for Foundation business.

To be added, send an e-mail message to jessica@cfsect.org with "e-news" in the subject or call Jessica, 860-442-3572.

Foundation's First Charitable Gift Annuity Given

Evelyn Peyton made Foundation history in 2002, becoming the first donor to create a charitable gift annuity.

Peyton, a longtime Connecticut resident, set up the gift to benefit the Women & Girls Fund. "I've always been interested in young people and wanted to see them have opportunities," said Peyton.

Under the terms of the gift, Peyton will receive a guaranteed income for the rest of her life. Upon her death, the remainder of the gift will pass to the Women & Girls Fund (see below).

A family blessed with strong female role models prompted the gift, according to Peyton, who grew up in Virginia. Peyton's mother realized her ambition to attend college away from home, first receiving an associate's

degree from Drexel Institute (now University) in Philadelphia and then her B.S. from Columbia University. She later taught at the College of William and Mary. Peyton's mother-in-law was an army nurse overseas in World War I.

"When I heard about the Women & Girls Fund, I thought 'I've been here for the greater part of 40 years. It's time do something in a little way for the community,'" she says, "and The Community Foundation seemed like a strong, sound institution."

The form of the gift was prompted by a conversation with a good friend, says Peyton, who splits her time between East Lyme and Houston, Texas. Combined with her charitable giving intent, the tax benefits and favorable income stream for

*"I thought...
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do something
in a little way for
the community."*



▲ Evelyn and Henry Peyton life made the annuity appealing.

After talking the idea over with her husband, Henry, she spoke with her financial adviser and then contacted The Community Foundation. Evelyn Peyton turned her thoughts of creating opportunities for others into an action, which will do just that for many generations to come. *

The Professional Advisors Corner

Would You Like To Have Your Cake and Eat It TOO?

By Mildred E. Devine, CTFA, AEP, Consultant, Devine Planning, and member of The Foundation's Professional Advisory Council

Usually when someone makes an offer to you that sounds too good to be true, it generally is; OR as they say, there is NO FREE LUNCH! However, if you have been thinking about your low basis, highly appreciated stock that is paying you very little in dividends and if you could use more income but don't want to incur the capital gains from selling the stock, there is a solution—A Charitable Gift Annuity.

A donor giving money or property to his or her favorite charity and receiving a guaranteed income for life creates the Charitable Gift Annuity. The income is a fixed percentage of the gift and that payment remains constant for life. The charity promises to make the payments, regardless of the income generated by the property transferred.

Most charitable organizations follow the guidelines established by the American Council on Gift Annuities for suggested rates and the actuarial assumptions behind the rates.

For example:

A single donor, age 75, gives to The Community Foundation of Southeastern Connecticut a check or stock

valued at \$50,000. In return the Foundation will pay the donor, based on current age, 7.3% or \$3,650 annually. The payments may be made quarterly, semi-annually or annually. The donor receives a charitable deduction of \$19,573.25 and increases his/her income considerably.

A couple, ages 75 and 80, gives The Community Foundation of Southeastern Connecticut stock with a fair market value of \$100,000 and a basis of \$25,000. The Foundation will pay the couple 6.8% or \$6,800 annually for the rest of their joint and survivor lives. In this example they would receive a charitable deduction of \$32,102.64 and at the same time increase their income.

With current interest rates so low, a Charitable Gift Annuity is a great way to safely increase your income while benefiting your favorite cause. So act now and lock in the best rate for you. For further information on what those current rates would be in your personal situation, don't delay—call today: Alison Woods, Director of Development, 860-442-3572 or alison@cfsect.org. *

2003 Grant Winners

Foundation Announces \$477,054 in Competitive and Donor Designated Grants

ARTS & CULTURE

Connecticut Early Music <i>Concert presentations for students and seniors</i>	\$1,800
Connecticut Humanities Council <i>Support of "East of the River" documentary</i>	\$6,000
Eugene O'Neill Theater Center <i>Support of playwrights and musical theatre conferences</i>	\$7,000
Florence Griswold Museum <i>Technology upgrade for educational programs</i>	\$7,000
Hygienic Art, Inc. <i>Exhibit featuring set paintings from 40 years of the O'Neill</i>	\$3,000
Lyman Allyn Museum of Art <i>Art Smart children's workshops</i>	\$10,000
Mashantucket Pequot Museum <i>Museum memberships for disadvantaged families</i>	\$5,000
Secret Theatre <i>Support of 2003-2004 theater presentations</i>	\$1,640
Summer Music <i>Support of "Ode to Joy" concert</i>	\$7,500

AFTERSCHOOL & SUMMER

Bateswoods Community Center <i>Environmental education program for young housing residents</i>	\$4,300
Billings P. Learned Mission <i>Support of summer programs for youth</i>	\$10,000
Children's Museum of Southeastern Connecticut <i>"Mythical Creatures, Legend & Heroes" literacy program</i>	\$10,000
Covenant Shelter of New London <i>On-site tutoring and mentoring for children at the shelter</i>	\$7,500
Garde Arts Center <i>Support for Colors of Life dance program</i>	\$8,500
Lyme Academy College of Fine Arts <i>Art Reach scholarships for talented young artists</i>	\$7,500
Mystic Ballet <i>Scholarships for Groton and New London students</i>	\$3,500
New London Community Boating <i>Sailing program for New London youth</i>	\$3,500
New London Office of Youth Affairs <i>Field trips for disadvantaged students</i>	\$5,991
Project Oceanology <i>Scholarships for Ocean Camp</i>	\$4,950
Science EpiCenter <i>DNA Learning Center programs for middle and high school students</i>	\$12,000
Stonington Community Center <i>After-school activities for kindergarten students</i>	\$5,000

CIVIC

Community Coalition for Children <i>Support of community presentation for parents</i>	\$6,300
Groton Public Library <i>"One Book, One Region" author visit</i>	\$5,000
Mystic Community Center <i>Support of family programs</i>	\$5,000
New London Main Street <i>Inventory of downtown commercial real estate</i>	\$3,500

Niantic Main Street <i>Baseline town inventory and assessment of commercial spaces</i>	\$3,500
Stonington Free Library <i>Reference and non-fiction books</i>	\$6,000
Wheeler Library <i>Computer workstations for public use</i>	\$2,500

EDUCATION

Colonial Theatre School <i>Shakespeare program in public schools</i>	\$7,500
Connecticut College <i>Assistive technology for students with vision and hearing impairments</i>	\$1,600
Connecticut Storytelling Center <i>Storytelling programs in New London elementary schools</i>	\$7,000
Girl Scouts, Connecticut Trails Council <i>In-school scouting program with math and science emphasis</i>	\$10,000
Literacy Volunteers of America <i>Database of coordinated literacy services</i>	\$8,450
Mitchell College <i>Financial aid for local students</i>	\$15,000
Mystic Art Association <i>Teacher training in the Visual Thinking Curriculum</i>	\$10,000
Regional Multicultural Magnet School <i>Summer academic program for incoming kindergarten students</i>	\$8,000
Riverfront Children's Center <i>Capital and safety improvements</i>	\$1,581
Salt Marsh Opera Company <i>In-school opera program</i>	\$2,500
Williams School <i>Scholarship support for disadvantaged students</i>	\$8,000
YMCA of Southeastern Connecticut <i>Equipment purchases for Small World Child Care</i>	\$1,250
Young Audiences of Connecticut <i>Performances and workshops in New London public schools</i>	\$7,500

ENVIRONMENT

Avalonia Land Conservancy <i>Matching funds for preservation of Paffard Woods</i>	\$10,000
The Nature Conservancy <i>Project to restore breeding habitat of fish population</i>	\$12,500

HEALTH

Community Partnerships <i>Portable projector for health and wellness presentations</i>	\$2,349
High Hopes Therapeutic Riding <i>Therapeutic riding for youth with disabilities</i>	\$8,000
Hospice of Southeastern Connecticut <i>Support of services not covered by insurance</i>	\$8,000
LEARN <i>Partnership in early childhood nutrition project</i>	\$3,500
Natchaug Hospital <i>Final pledge payment on capital renovation project</i>	\$10,000
Planned Parenthood of Connecticut <i>Outreach and services for teens</i>	\$5,000
Prevent Blindness Connecticut <i>Vision screening and services for pre-schoolers</i>	\$10,000

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2003 Grant Winners

2003 Grant Winners continued from page 4

SOCIAL SERVICE

A Moveable Feast	\$3,200
<i>Meal deliveries for people in medical crisis</i>	
American Red Cross	\$8,000
<i>Upgrade computer systems and services</i>	
Care and Share Soup Kitchen	\$2,000
<i>Food and supplies for needy and elderly</i>	
Catholic Charities	\$2,000
<i>Housing support for those at risk of homelessness</i>	
Connecticut Legal Services	\$16,500
<i>Network of services for children and victims of domestic violence</i>	
Connecticut Teen Peace	\$2,000
<i>Anger management program for teens</i>	
The Cove Center for Grieving Children	\$3,500
<i>Counseling for children who have experienced loss of a parent</i>	
First Step	\$4,885
<i>Employment program for people with psychiatric disabilities</i>	
Habitat for Humanity of Southeastern Connecticut	\$7,500
<i>Support of housebuilding program</i>	
Kids In Distressed Situations (K.I.D.S.)	\$6,320
<i>Distribution of new clothing and items to low income children</i>	
Malta, Inc.	\$5,000
<i>Expansion of outreach efforts to homeless</i>	
New London Adult Education	\$5,000
<i>English language classes focusing on employability skills</i>	
New London Community Meal Center	\$7,000
<i>Kitchen equipment for meal preparation</i>	
Opportunities Industrialization Center (OIC)	\$8,000
<i>Job training program</i>	

SCADD	\$5,000
<i>Systems upgrade to comply health insurance requirements</i>	
Thames River Family Program	\$5,283
<i>Relapse prevention advocate</i>	
United Way of Southeastern Connecticut	\$12,500
<i>Emergency fuel assistance</i>	
Women's Center of Southeastern Connecticut	\$4,000
<i>Health services coordinator for victims of domestic violence</i>	
Total Competitive Grants:	\$428,899.00

Donor Designated Grants

American Red Cross	\$550
B.P. Learned Mission	\$550
Children's Museum	\$550
Hospice of Southeastern Connecticut	\$500
Lawrence & Memorial Hospital	\$1,100
Literacy Volunteers	\$475
Lymes Youth Service Bureau	\$400
Mystic & Noank Library	\$475
Noank Historical Society	\$475
Old Lyme Day Care	\$400
Public Library of New London	\$1,630
St. Pauls Church	\$500
VNA of Southeastern Connecticut	\$20,000
Waterford Public Library	\$20,000
West Farms Land Trust	\$550
Total Designated Grants	\$48,155.00
Total 2003 Grants:	\$477,054.00

Great Grants!

Great Grants!

Fostering Conversations Across the Generations

Sean P. Kane, director of the Town of Waterford's Senior Services Department, saw something missing from the lives of many of the older residents he works with on a daily basis: communication between the generations. He approached The Community Foundation with an idea of bringing together teenagers and older persons in New London and Waterford for a day of discussion, sharing and ultimately—a greater understanding. He saw this event as a way to decrease feelings of isolation among older persons and to broaden the views of teenagers.

In 2002, The Community Foundation responded with a grant to Waterford Senior Services for the project. Niantic resident Jane Yousey, author and "life design coach" who has appeared on The Today Show, acted as facilitator for a group of older persons from New London and Waterford, middle and high school students from the same towns, and Mitchell College students at a discussion on October 8th. Three groups focused on the themes of friendship, decision-

making, and hope for the future. One older participant advised students, "The older you get, the less you care what others think." Some students expressed uncertainty for how they are perceived and for their future. Older participants responded: "Do everything you can. Don't let a single chance go by!" By the end of the session, the younger and older populations were talking easily—and the youth responded very well to the positive and encouraging messages of the day.

A premiere of a video compilation of the session, **Bridging the Divide: Generations Talking** is scheduled for Wednesday, May 28th, 6:30pm at Waterford Senior Services, 1000 Hartford Road. Kane plans to distribute copies of the video to schools, libraries, and senior centers in the area and to other communities in the hopes of promoting many more intergenerational discussions. Says Kane, "Through communication, compassion grows, solutions to problems are found, and all generations benefit." *

Great Grants!

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Please join us for:

Women's Journeys: An Evening with Diane Rehm to benefit the Women & Girls Fund

Wednesday, May 7, 2003 at The Mashantucket Pequot Museum

6:00 pm — Reception

**7:00 pm — Conversation with Diane Rehm
(book signing, coffee & dessert following)**

\$75 per person – reception, speaker & dessert

**4:00-5:45 pm — Workshops on movement,
Native women leaders, visual arts and writing**

\$125 per person – workshops, reception, speaker & dessert

Premier Sponsor: Pfizer

Partner Sponsor: People's Bank,

**The Mashantucket Pequot Tribal Nation,
Fleet, and The Day**

Supporter Level: The Resident

For more information contact:

Jessica at 860-442-3572 or jessica@cfsect.org



THE COMMUNITY FOUNDATION
of Southeastern Connecticut



Diane Rehm, nationally acclaimed public radio host broadcast live on more than 75 stations worldwide, reaching 1.4 million listeners weekly. Author of *Finding My Voice* and *Toward Commitment*.

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