



# mission 2024 IMPAC, TO STORY OF THE PROTECTION O











#### Dear Friends,

Several years ago, I started an exploratory journey to direct my passion for ensuring that everyone in our community has equitable opportunities and outcomes. I knew it was essential to find an organization committed to focusing on the systemic inequities that create disparities and disadvantages.

I am grateful that search led me to Fairfield County's Community Foundation — and that I now have the privilege of serving as its Chair. My Board colleagues, our CEO, and her team share a deep passion for upholding the foundation's values of collaboration, equity, and respect — values that are embedded in our vision and our work.

Our dedicated **staff** has been incredible in pursuing our mission. Their passion and commitment are what makes us successful in working towards our stated goals. Our **partnerships** are the building blocks to engage our community in focusing on impacting several issue areas, including:

- making housing more affordable and accessible,
- ensuring access to education,
- · expanding economic opportunities,
- · advocating for civic engagement, and
- · working towards health equity.

The year ahead will bring new opportunities and challenges. The geopolitical environment has pushed several obstacles in our path, but we are equipped with the knowledge, the skills, the abilities, and the passion to forge ahead and dedicate ourselves to do great work. I look forward to your continuing support in pursuing all our endeavors.



**Dr. Maya Reddi**Board Chair,
Fairfield County's
Community Foundation

# Fairfield County's Community Foundation Board of Directors

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#### With Special Thanks to Our Committee & Council Members

We are deeply grateful to all who serve on our committees and councils and help guide and shape the Community Foundation's strategic approach, grantmaking, operations, and philanthropic services. Your dedication and support help us better meet needs and serve our community.

<sup>\*</sup> Incoming Board Member

<sup>\*\*</sup> Outgoing Board Member











#### Dear Friends.

There are two ways we can respond to the challenges facing our nation and our community. We can retreat into fear, despair, and apathy. Or we can take action.

At Fairfield County's Community Foundation, we choose action. Every day of the week. For it is through the act of doing that we can create stronger neighborhoods, a more equitable community, and a better world.

This annual report is a testament to that philosophy and, frankly, a call to action to continue pushing for progress. Hopefully, as you read about what we are achieving in support of students, women and girls, entrepreneurs, and those who have faced discrimination and inequity, you will gain more clarity and inspiration for joining us on the path forward.

I'm under no delusion that this is easy. Nor am I oblivious to the painful realities around us. Seemingly every day, we are reminded of the fragility of our world order amid the deadly specter of violence and war. This summer's record heat and devastating storms and tornadoes, many impacting our region directly, deliver a clear message that the threat of climate change is growing ever more severe. Economic conditions have made it impossible for too many households to stretch their paychecks to cover the basic costs of housing, food, transportation, clothing, and healthcare. Too many of us are being threatened by divisive political rhetoric and government policies that are limiting our choices, our freedoms, and our futures.

That's a lot to take in. It's easy to feel disheartened. It's tempting to sit and stew. But where would that get us? The truth is, we cannot control what's happening on the other side of the world — or even the other side of our country. But we can influence and improve what happens in our backyard.

Throughout this report, you'll discover how we're putting our mission into motion by bridging divides, empowering community members to raise their voices, and supporting the amazing nonprofits that are working to create a stronger and more resilient Fairfield County. I hope these examples help restore your faith in what's possible in our community. But, more importantly, I hope they inspire you to commit what you can to support the movement for creating a Fairfield County grounded in equity and opportunity.

We cannot do this important work — or create the community we all envision — without you. Now is the time for all of us who believe in the vision of a better future for Fairfield County to give our talent, our time, and our resources to help us get there. Now is the time to make progress in creating a region where every person has an equitable opportunity to thrive. Now is the time for action. Let's get to work!

In Community,





Mendi Blue Paca President & CEO, Fairfield County's Community Foundation

# Here to Help You Make a Difference

Our goal is to partner with everyone to advance equity in Fairfield County – whether you're a local nonprofit or business, community leader, lawmaker, or simply a person who cares about the community. We believe that, together, we can address challenges and identify opportunities to create a stronger, more vibrant region.

# **Our Work**

We work to advance equity in Fairfield County by focusing on the key areas of youth education and career development, income and asset building, women and girls' health equity, and housing opportunity. We also foster civic engagement, support local nonprofits, and bring people together to learn and innovate.



# **Our Grantmaking**

In addition to donor-advised grants, the Community Foundation awards its own strategic grants to help local organizations advance equity. With a focus on trust and collaboration, we strive to identify and fund nonprofits and community groups that work closely with people who have been most affected by unfair systems.

# Your Partner in Philanthropy

Many commercial financial institutions offer tax-advantaged philanthropic vehicles, but when you partner with Fairfield County's Community Foundation you're more than just an account number. Our team of philanthropic experts will listen to your goals and help you maximize your impact – right in your own community.

# 2024 by the Numbers

# **Grants to Nonprofits**

\$23.7 million

in total grants

**GRANTMAKING SERVING FAIRFIELD COUNTY NONPROFITS** 

1,039 grants totaling

4.7 million

to 435 nonprofits serving Fairfield County

\$10.1 million

in donor-directed grants

4.6 million

in strategic and discretionary grants

# **Gatherings**

**2,005** people attended 68 community events

# **Scholarships**





Informed by three decades of partnering with and serving our community, since 1992 we have awarded more than \$400 million in grants to nonprofits in Fairfield County and beyond.



▲ In October, Pulitzer Prize-winning author Matthew Desmond discussed the challenges of persistent poverty in America and rallied the audience to be "poverty abolitionists."



▲ In February, physician and author Dr. Uché Blackstock shared an inside view of the systemic barriers Black patients and physicians face, and led a discussion on addressing inequities in health care.



▲ In May, Pulitzer Prize-winning journalist Nikole Hannah-Jones discussed her work of covering racial injustice and her powerful 1619 Project, which explores the legacy of the Trans-Atlantic slave trade on our culture, politics, economy, and institutions.

MISSION IN MOTION

"IN COMMUNITY" CONVERSATION SERIES

# Inviting More Voices to the Conversation

Our speaker series welcomed nearly 600 people to discuss critical issues involving inequity, poverty, and race. Forget invite only. All were welcomed at this year's "In Community" speaker series.

The three-event series drew nearly 600 guests representing a cross-section of Fairfield County's vibrant and diverse community. They brought high energy and thoughtful discussion to events featuring some of the brightest and buzziest thinkers of our time.

"The series was meant to be a resource for the whole community, to spark conversation and get people active – and it did just that," said Elaine Mintz, the Community Foundation's Vice President of Strategy & External Relations. "Our goal was to provide opportunities for as many people as possible to take part."

#### REMOVING BARRIERS TO ENGAGEMENT

That meant offering a no-cost option to attend, ensuring that the price of a ticket was not a barrier. The no-cost option was made possible in large part through the support of key sponsors: Webster Bank; the Carmody, Torrance, Sandak & Hennessey law firm; and series partner Connecticut Public.

"Poverty, healthcare disparities, and our nation's legacy of slavery resonate in the lives of everyday residents," said Lucy Nalpathanchil, Vice President of Community Engagement at Connecticut Public. "As the statewide NPR and PBS station, Connecticut Public works to inform with conversations and events like these."

## **LEARNING FROM THOUGHT LEADERS**

Featured speakers Matthew Desmond, Dr. Uché Blackstock, and Nikole Hannah-Jones brought deep expertise to conversations that explored some of the most challenging and persistent issues facing our community and nation: from poverty and inequities in healthcare, to the historic roots of racial injustice.

Feedback on the inaugural series was overwhelmingly positive. As one attendee of the Nikole Hannah-Jones event shared: "I am confident that the participants, and Nikole herself, are forever changed by this conversation. I know that I am!"



Help fuel more community conversations: FCCFoundation.org/SupportEquity





Pictured, left to right: Webster Bank team members Craig Johnson, Teshia Levy Grant, Kelly Giordano, and Timothy Throckmorton.



MARISSA WEIDNER

Chief Corporate Responsibility Officer, Webster Bank

Webster Bank values equity in our communities, so we were excited to support the 'In Community' speaker series. By welcoming everyone in our community to hear from experts focused on creating equitable access, we can take a positive step toward building stronger communities where all are able to thrive.



YOUTH PHILANTHROPY COUNCIL

# Developing the Philanthropy Leaders of Tomorrow

Young people from across Fairfield
County are learning about careers and making a difference through our new
Youth Philanthropy
Council.

Gen Z holds the key to creating a more just, equitable, and compassionate community. While its youngest members are still teenagers, this emerging generation is already showing a desire to make a difference.

Fairfield County's Community Foundation's new Youth Philanthropy Council – a two-year, county-wide effort launched in March – aims to help socially conscious young people start making an impact now.

The program brings together a diverse class of ten participants, ages 16 to 24, to learn about the philanthropic sector with two experienced mentors.



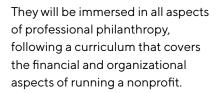
The Youth Philanthropy Council's inaugural cohort gathered this summer for a kickoff event at Bridgeport Creates.





JULIA BASSETTO
Senior at Fairfield Warde High
School, Youth Philanthropy
Council Member

I'm excited to make an impact, to become more educated on philanthropy, and work with fellow council members using the grant process to actually help people.



Council members will also visit local nonprofits, volunteer, and explore key issues affecting our community.

# GETTING REAL WITH GRANTMAKING

In the second year of the program, members will also create their own grant process, reviewing applications and awarding grants to Fairfield County nonprofits.

"I'm excited to make an impact, to become more educated on philanthropy and work with fellow council members using the grant process to actually help people," said 16-year-old Julia Bassetto, a senior at Fairfield Warde High School.



The Council is led by Community
Foundation program associates
Sarah Omotunde and Alli Ganim,
both early-career professionals,
who say the program has already
revealed benefits beyond career
development. Members are building
new relationships, discussing
solutions for issues they care about,
and gaining deeper awareness of
how philanthropy affects their lives in
unseen and unexpected ways.

# SHARED LEARNING AND CONNECTION

"As this program evolves, we're excited to see the impact young people are able to make - and where they invest their dollars as they grant into their communities," said Omotunde. "I love how they bring so much curiosity to the sessions," added Ganim. "I'm always learning from them as well, and that's something we hear from the mentors all the time."

Council member Elie Mulumba, age 18, a rising senior at Great Oaks Charter School in Bridgeport, said she appreciates the opportunity to connect with likeminded people who share similar goals.

"The Council reassures me that there are people who are trying to fix the issues that not only plague the world, but plague our communities as a whole," said Mulumba.

With these young people preparing for future leadership, Fairfield County, it appears, is in good hands.



Help support youth education and career development: FCCFoundation.org/Youth



# Helping Local Nonprofits Thrive & Grow

The Center for Nonprofit Excellence works to foster connection and support action.



As nonprofits continue to recover from the pandemic, in-person networking and strategic training have been a key focus for the Community Foundation's Center for Nonprofit Excellence (CNE).

"We knew our nonprofit partners were eager to get back into community together," said CNE Senior Manager Rebecca Cordero. "There has been a great spirit of connection at our events this year, and the feedback reinforces our investment in similar programming going forward."

One of these offerings was the "Mission in Motion" learning and networking series, which aimed to help nonprofits with limited time and resources tell their stories in ways that amplify their mission. Sponsored by Community Foundation partners AlphaGraphics and Dot Think Design, the series began with three virtual workshops that offered a deep dive into marketing, planning, and budgeting.



Top photo, left to right: Claire Taylor, Founder & Director, Claire Taylor Foundation; and guest.

Bottom photo, left to right: David Stowe, VP of Business Development & Marketing, AlphaGraphics Stamford; Corti Cooper, Founder & Creative Director, Dot Think Design; Frank Leone, Owner, AlphaGraphics Stamford.

Photo on following page, left to right: Kimberly Henrikson, Christopher Shore, Rosemary Laracca and Jackie Akers, Center for Contemporary Printmaking



#### **EMPOWERING STORYTELLERS**

"We wanted to share marketing insights and give away makeovers to cause-based organizations doing work in Fairfield County," said David Stowe, VP of Business Development & Marketing at AlphaGraphics. "We needed to connect with more organizations to have the greatest impact, and we knew the best way to do this was to ask the Community Foundation to partner with us."

"The goal was to empower nonprofits to maximize their resources," added Corti Cooper, Principal and Creative Director of Dot Think Design. "They already know the stories they need to tell. This series helped them create actionable marketing plans and track their successes."

The series closed with an in-person networking event bringing together more than 70 attendees at Sono Sky Bar to connect and celebrate. Through a drawing, Norwalk Community College Foundation and Meals on Wheels of Greenwich each received mini marketing makeovers from AlphaGraphics.





# REBECCA CORDERO

Center for Nonprofit Excellence Senior Manager, Fairfield County's Community Foundation

There has been a great spirit of connection at our events this year, and the feedback reinforces our investment in similar programming going forward.





 $\label{lem:condition} \textbf{Help strengthen nonprofits serving Fairfield County:} \\ \textbf{FCCFoundation.org/SupportNonprofits} \\$ 

# **ECONOMIC OPPORTUNITY**

# The Changemaker Fund

# Empowering local changemakers to chart their own paths toward better futures

Many households across
Connecticut struggle to earn a
liveable wage, pay bills, and save.
The path to a better economic future
can become clearer with access to
additional cash and the autonomy
to use it to create stability,
opportunity, and hope.

To address this need, the CT
Urban Opportunity Collaborative
(CUOC) – a partnership of Fairfield
County's Community Foundation,
the Hartford Foundation for
Public Giving, and the Community
Foundation for Greater New
Haven – is working with the
national organization UpTogether
to launch The Changemaker Fund:
A Power Building Initiative.

The Changemaker Fund deploys direct cash payments each month to local changemakers with low incomes who are working to alleviate financial hardship for themselves and their communities. Over three years, 120 Connecticut households - 40 in Greater Bridgeport - will receive monthly payments totaling \$12,600 to improve their conditions.

# INVESTING DIRECTLY IN COMMUNITIES

This model builds on successful guaranteed basic income initiatives that have proven cost effective for organizations and communities. The Urban Institute reported in April that "historic and current guaranteed income experiments demonstrate excellent outcomes for children, and strong gains in adult mental health, physical health, and parenting, as well as large increases in household food security and housing stability."

"People need a variety of different tools and flexible opportunities to address their issues," noted Cesar Aleman, Director of CUOC. "This is a way to invest directly in communities that have been historically under-invested in - to support people's efforts to build power, not just to change their personal circumstances but also to change the circumstances of their community."

#### **MAKING A REAL IMPACT**

Lutonya Russell-Humes, VP of Grants & Programs at Fairfield County's Community Foundation, emphasized that while traditional social programs targeting issues like food insecurity remain vital, access to unrestricted cash offers a chance to address other needs or pursue goals.





"Maybe that money can be used to help move to a community that is a bit safer, or has a better school system," Russell-Humes said. "Better yet, maybe it means a parent has time to show up to school board meetings to fight for the school their child is in now." She hopes The Changemaker Fund sparks conversation on how to address systemic challenges "and what it really means to move communities to a place of thriving." To date, \$1.4 million has been raised to support the pilot program, with a goal of reaching \$1.8 million by the end of 2024. Donors can be assured their contributions will significantly impact families' lives.





Support economic opportunity:

FCCFoundation.org/Income

# Bookstore Dream Realized Through Innovative Funding







"My family did not pass down any kind of generational wealth to me or teach me how to do that for my kids," says Hargrove. "When the idea to open a bookstore morphed into a dream, Honeycomb Credit provided me with the tools and emotional support to raise \$32,000. They helped me with social media outreach, introduced me to their network of investors, and held my hand for the entire 30-day crowdfunding campaign."

By achieving her funding goal, Hargrove was able to sign a lease for retail space. Obodo Serendipity Books opened on Main Street in Stratford in early September.



Learn more:

FCCFoundation.org/Honeycomb





MISSION IN MOTION

**CIVIC ENGAGEMENT & ADVOCACY** 

# Advocating for a Fairfield County Where Everyone Thrives

The Community Foundation is using its voice to advance policies that help young people achieve bright futures.

When young people can finish high school and pursue degrees or find livable-wage jobs, it builds a healthier community. Still, many students in Fairfield County attend low-resourced schools that struggle to recruit and retain top-quality teachers. And many graduates cannot access the education and training needed for meaningful careers.

The Community Foundation is working to change that by supporting public policies that remove barriers to student success. Through its Fairfield County Forward strategy, the Community Foundation has expanded its focus on investing in advocacy.

"The Community Foundation is more than a grant maker," said Sheila Perrin, a fundholder and former Board Chair. "It is raising its voice and providing tangible support to the people and organizations working to change policies and create a better future for our region."

#### **CHAMPIONING CHANGE**

Some colleges and universities reduce financial aid awards to students who earn merit-based scholarships. This practice, called scholarship displacement, disproportionately affects students facing financial hardship. As an organization that provided more than \$1.1 million in scholarships last year to support 251 students, the Community Foundation believes scholarship displacement harms both students and donors.

During the 2024 Connecticut Legislative Session, the Community Foundation advocated for a bill requiring Connecticut colleges and universities to disclose their scholarship displacement policies – a measure approved by the Legislature, thanks to the leadership of its Higher Education and Employment Committee.

The new law will help make post-secondary education more accessible to all by allowing students to make informed decisions about whether to apply for scholarships. This mandatory disclosure may also help push colleges and universities to change their displacement policies in the future.

#### STEPPING UP TO LEAD

"The Community Foundation's advocacy on scholarship displacement is an important step in protecting the rights of students and ensuring that donors who support scholarship funds see their philanthropy fully benefit students," said Elaine Mintz, VP of Strategy & External Relations.

Change doesn't always come quickly. But the Community Foundation's commitment to advocacy ensures it will be here over the long term to support the people and organizations pushing for policies that improve lives.



Help advance equitable policies: FCCFoundation.org/Advocacy







**SHEILA PERRIN** Fundholder & Former Board Chair, FCCF

The Community Foundation is more than a grant maker.
They are raising their voice and providing tangible support to the people and organizations that are working to change policies and create a better future for our region.



# Fighting Inequity with Action

Charlotte Suhler, co-founder of the Community Foundation's Fund for Women & Girls, is a champion for gender equity.

# THE STATE OF EQUITY FOR WOMEN & GIRLS IN FAIRFIELD COUNTY



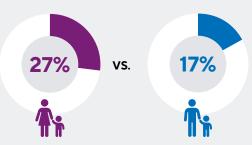
# WOMEN EARN 20% LESS

on average annually than men, a disparity nearly 5% greater than the national average

### LIVING BELOW THE POVERTY LINE:

Female-led families

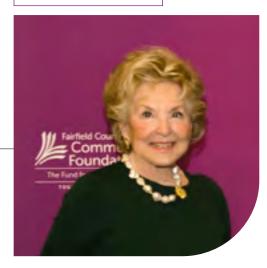
Male-led families



Source: 2023 Fairfield County Community Wellbeing Index

#### MISSION IN MOTION

**DONOR SPOTLIGHT** 



Charlotte Suhler's passion for empowering women runs deep.

Working in the male-dominated publishing industry during the 1960s, she spent years witnessing gender inequity. Then, later in her career, she experienced the challenges many women face of trying to manage work demands and family. Forced to turn down a job after moving to Darien due to limited availability of childcare, Suhler created a solution for herself and others

After extensive research on the need, she partnered with the Darien-Norwalk YWCA to initiate the opening of a childcare center that would help support the career ambitions of Fairfield County women. She also served as president of Five Town Foundation, which eventually merged with others to form Fairfield County's Community Foundation.

Suhler was just getting started. In 1998, she joined late Community Foundation CEO Susan Ross and other key supporters in launching the Fund for Women & Girls to create more opportunities for women in Fairfield County. Since its launch, the Fund has helped thousands of women access resources to improve their futures.

"We had zero dollars but good hearts," said Suhler.
"We all took joy in seeing the impact of the money we could give."

# CREATING INNOVATIVE SOLUTIONS FOR WOMEN

The group initially focused on the most critical issue confronting women in the community: access to affordable housing. After conducting extensive research, the group discovered that most women were able to secure jobs and necessary childcare. But they weren't earning enough to afford decent housing.

To meet this need, an innovative program was launched to provide loans to women to secure their own apartments. Training programs were also created to educate women on how to get approved for a mortgage to achieve first-time home ownership.

"There's been many situations in life where I've needed to step back to fully realize the inequity I've witnessed," Suhler said. "As the mother of three daughters, I wanted to make sure my children didn't have to face the same challenges as women before them."



Learn more and get involved: FCCFoundation.org/FWG



# A CONTINUED COMMITMENT TO LEADING CHANGE

Today, women in Fairfield County continue to grapple with a major pay gap. On average, they earn 20% less annually than men – a disparity nearly 5% greater than the national average. Women also face significantly higher poverty rates, preventing many from pursuing the future they desire.

Fueled by her passion for advancing equity, Suhler has spearheaded many initiatives over the years in affordable housing, education, the arts, and healthcare. She's also a fervent advocate for young women participating in sports, which she believes teaches important leadership skills.

Suhler's long-standing commitment to empowering women, combined with her service and leadership experience in the community, allow her to inspire other women's rights advocates to lead change.

"Change may start with an observation of just one person, but as others realize needs, we can create impact," Suhler said.

Charlotte Suhler, left, with Anna Rodriguez and her daughter Genesis, featured in the Community Foundation's 2008 Annual Report.



MISSION IN MOTION

**IN REMEMBRANCE** 

# Remembering Mike Harris

A community leader with a can-do spirit, Mike's joyful service and generosity have created an enduring legacy.



Mike Harris knew how to get things done.

He had a knack for inspiring others to take action and tackle challenges by breaking them down in manageable steps to achieve a goal. And when he passed away on June 6, Mike left a legacy of a can-do spirit, selfless service, and a blueprint for a life well-lived.



### **GIVING BACK WITH TIME & TREASURE**

Fairfield County's Community Foundation had the fortune of having Mike as a tireless advocate who served a lengthy tenure on the organization's Board of Directors, including serving as its Chair. And, through his decadeslong career as a trusts and estates attorney, he guided clients to create meaningful legacies through the power of planned giving.

"Mike brought a lot of joy and positivity to the board when he took on the leadership role," said Karen Brown, a former VP of Development & Philanthropic Services at the Community Foundation. "He was a champion and ambassador for the Community Foundation, and it was easy for him to speak to others about it because he believed in the work that was being done."

That belief in giving back to the community had always been central in Mike's life, said his wife, Sally Harris. Mike was recognized as Outstanding Volunteer of the Year by Volunteer Center of Southwestern Fairfield County. And in 2008, he and Sally were both named Citizens of the Year by the Greenwich Chapter of Rotary International.

# VIEWING THE WORLD THROUGH MIKE'S LENS

Mike was passionate about arts and culture and loved traveling with his wife. Later in life, he found a way to merge all those passions through the lens of a camera. That passion led to his self-published photography collection Now You Can Take My Picture: Sharing Cultural Exchanges.

In the preface to the book, Mike wrote, "Nothing feels better to me than heading out, camera in hand, eyes wide open, searching for that perfect photograph."



"His camera was the key to connecting with others," said Sally, who shared a similar passion for photography. "He could approach anyone and start a conversation – that was his superpower. And it was so rewarding for the both of us."

The couple held their first exhibition at the Cos Cob Library in 2014.

Since then, their work has also been displayed at the Greenwich Library, the Bendheim Gallery in Greenwich, the Carriage Barn Arts Center in New Canaan, and the Greenwich and Stamford Art Societies.

And while he held many different positions, Mike's favorite role was spending time with his wife and his two daughters.

"Mike loved his family with his whole heart," said Sally. "He will forever be missed, but his legacy and spirit of giving lives on through us."



#### KAREN BROWN

Former VP of Development & Philanthropic Services, Fairfield County's Community Foundation

Mike brought a lot of joy and positivity to the board...he was a champion and ambassador for the Community Foundation, and it was easy for him to speak to others about it because he believed in the work being done.





Learn how you can create a forever gift to your community:

FCCFoundation.org/Future

#### **FUND ANNIVERSARY**

# **Celebrating 20 Years of Family Philanthropy**

This year marks the 20th anniversary of the Lucy and David Ball Family Fund, a donor-advised fund established by Darien residents Lucy and David Ball in partnership with Fairfield County's Community Foundation. The fund supports educational and community needs, and other charitable programs.

"David and I started this fund when our children were young to pass on the values that shaped us," Lucy says. "Now, as young adults, they know the positive influence their actions have within the community."



"Creating the fund was an easy decision 20 years ago," Lucy reflects. "Seeing it grow with the Community Foundation so we can continue supporting causes we care about as a family is truly rewarding."



Lucv Bal

# Plan a gift that transcends time.

You can create a forever gift to your community, regardless of age or income. Work with us to design a planned giving strategy that can help create bold solutions for future generations.



scan me



Want to explore your options? All conversations are offered at no cost, and with no obligation. Contact Sara DeRose, Director of Development & Philanthropic Services, at (203) 750-3210 or SDeRose@FCCFoundation.org.

We are grateful to these visionary philanthropists who are shaping the future for the communities they love through a bequest or another planned gift.

# Living

Nada Albritton

Millette Alexander

Jeannette Archer-Simons and Robert Simons

James and Kaye Barker

Nancy Bassett

Barbara Louise Blauvelt

Elisabeth Breslav

Gene Celentano

Lauren Cohen

Vernon and Anita Coles

Sharon Danosky

Daryl Duarte and David Schiffer

Bari Dworken

Jonathan Fraade

Ellen Funck

Brian Goldstein

Sally Harris

Lori Hashizume and Douglas

Fiona Hodgson

Juanita James

Charles and Rachel Jensen, Jr.

William Knobloch

Helen and Richard Koven

Gary Kraut

John Marshall Lee, CLU, RHU

Barbara Littlefield

Charles MacCormack

Jeremy Main

Ann Mandel

Brian and Cindy Meehl

Jacqueline and Doug Millan

Jonathan and Elena Moffly

Linda Molnar

Liz Morten

Steven Mueller

John Nelson, II

Gregory and Sue Neumann

Jane Norgren

James Photis

Margaret Platka

Marianne Pollak

Jane Ready

Maya Reddi

Cynthia Richter

June Rosenthal

John and Sally

Schlachtenhaufen

Charlotte and John Suhler

Anne Thaxter

Curtis and Katharine Welling

Herbert and Deanne Winokur

# Remembered

Donald Baldwin

Elizabeth Wingfield Barnett

Frances Barry

Evelyn Bausman

Stuart Bernard

Harry Brodbeck

Ida Davidoff

Barbara Benton Davis

Frances Marian Deas

Sally Dickson

Joan Diedolf

Anna Dziuba

Robert and Sally Factor

Mary Elizabeth Farman

Eric Ferguson

W. Michael Funck

Thomas Gilmartin

Father John Giuliani

Jane Gade Halliwell

Irene Handleman

Frances Hansson

Mike Harris

**Edward Harrison** 

Dorothea Havighorst

Eduvina Hennigar

Helen Hermes

Dorothy Herrmann

Mary Elizabeth Hill

Mia Holthausen

Ellen Hosiosky

Gloria Marion Jankowich

Shirley Jankowich

Joan Kadlec

Henry Katz

Audrey Knobloch

Helen Kukiel

Vicki Lesser

Charlton Lyman

Patricia Main

Dorothy Massello

Elizabeth Matthews Thomas McCullough Stella Margaret McHenry

Jordan and Sylvia Mitchell

Kenneth and Katharine Mountcastle, Jr.

Helen Muller

Roy and Carolyn Neumann

Leo Nevas, Esq.

Elizabeth Bissell Northcross

Edward and Grace Nunes

Sharon Orloski

Janice Park

Nancy Pilgard

James Powell-Tuck

Jonathan Prince

Mary Josephine Rahatz

Philip and Frances Ramer

Robert Ready

Dr. Charles Reed

Elizabeth Phillips Rich

Jean Gregory Richmond

Pamela Ritter

Leah and David Robinson

William Morris Saba

Joseph Santry

**Dorothy Savage** 

Edgar See

Hariett Sherman

Gary Allen Smith

Richard Smith

Marilyn Spence

**Edmund Spencer** 

Virginia Squiers

Ruth Sternbach

Susan Supple

Cecelia Telickey

Mary Varaljai Joan Warburg

**Edward Warren** 

Julia Wasserman

Ernest and Lee Wiehl, Jr.

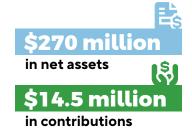
Gene Wilder

Dudley Williams, Jr.

Let us help you plan a lasting legacy. FCCFoundation.org/Future · 203-750-3200

# A Note About Our Financials

The bulk of Fairfield County's Community Foundation's assets resides in our long-term investment portfolio. This pool of investments is a globally diversified portfolio across stocks, bonds, and alternative investments such as hedge funds, private equity, and private real assets. While market dynamics inherently involve ups and downs, our Investment and Finance committees remain steadfast in their commitment to a long-term management strategy that will sustain our ability to serve our community for generations to come.



# **Investment Options**

Fairfield County's Community Foundation offers a variety of investment options designed to meet your philanthropic goals and objectives.

#### LONG-TERM INVESTMENT OPTIONS

#### **Investment Pool**

This global balanced fund is the most common investment choice. Using well-researched, high-quality, and regularly monitored investments, this highly diversified risk-adjusted portfolio seeks long-term growth which supports both current and future programmatic work and grantmaking. Money managers are selected by our Investment Committee with the assistance of a neutral investment consultant. The policy allocation is 53% equity, 32% alternative investments, and 15% fixed income.

### Vanguard Index Fund (VBIAX)

This single-strategy investment leverages the Vanguard Balanced Index Fund Admiral Shares, a passively managed mutual fund. This option is ideal as a low-cost choice to gain exposure to stocks and bonds with a long-term investment horizon. The target policy allocation is 60% equity and 40% fixed income.

### **INTERMEDIATE & SHORT-TERM OPTIONS**

Asset allocation for intermediate investments may vary depending on market conditions and investment horizons. The target allocation range for the intermediate-term options is 50% to 80% equity, 42% to 12% fixed income, and 8% alternative investments.

#### **Non-endowed Investment Choices**

The following pools are managed to match a donor's intent of immediate and sizable grantmaking, with an investment objective of moderate growth and sufficient liquidity.

Raymond James Investment Option

This diversified portfolio is made up of 12 mutual funds and ETF strategies that offer liquidity and simple market valuation. This investment is suited for a three-to-seven-year grantmaking plan, with estimated fees of 0.51%.

Intermediate Investment ESG-Aware Pool

This diversified portfolio is comprised of twelve mutual funds and ETF strategies selected to deliver ESG-driven products, liquidity, and simple market valuation. This option is well-suited for donors with a three-to-seven-year grantmaking plan, and a preference for transparency and social impact. Estimated fees for this fund are 0.60%.

Ultrashort Fixed Income Pool

This investment option invests in cash and cash equivalents to maintain liquidity similar to a traditional money market pool, offering the least amount of risk with a corresponding lower yield. This can be a desirable option if immediate or near-term grant recommendations are planned, or when used as a complementary strategy alongside other investment options.

#### INVESTMENT ADVISOR OPTION

Donors who maintain a fund with a minimum value of \$250,000 may choose to keep their own investment manager or name an external qualified advisor to manage their investments. We will work with the advisor to maintain a reasonable asset allocation, manage cash flow, and approve investments changes.

JULY 1, 2023, TO JUNE 30, 2024

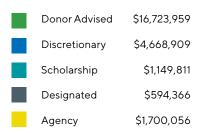
# Financial Statement\*

		FY2024		FY2023**
Revenues				
Contributions and Other Revenue	\$	14,658,681	\$	17,680,635
Investment Income, Net of Expenses		28,967,293		20,020,048
Total Revenue	\$	43,625,974	\$	37,700,683
Expenses				
Program Expenses	\$	25,928,388	\$	26,293,769
Other Expenses		3,049,923		3,324,301
Total Expenses	\$	28,978,311	\$	29,618,070
Change in Net Assets	\$	14,647,663	\$	8,082,613
Annaha				
Assets	_	2/0.040	_	4.505.055
Cash and Other Assets	\$	360,049	\$	1,535,855
Investments		280,598,186		264,518,551
Operating Lease Right of Use	-	1,072,387		1,273,228
Total Assets	\$	282,030,622	\$	267,327,634
Liabilities and Net Assets				
Grants Payable & Accounts Payable	\$	1,329,757	\$	456,727
Operating Lease Liability		1,290,308		1,515,238
Agency Funds & Other Liabilities		9,672,420		10,265,195
Total Liabilities		12,292,485		12,237,160
Net Assets		269,738,137		255,090,474
Total Liabilities and Net Assets	\$	282,030,622	\$	267,327,634

<sup>\*</sup> Unaudited; excludes nonprofit endowment funds.

For a complete copy of our audited financial statements and tax returns (IRS Form 990), please visit FCCFoundation.org/Financial or contact our Finance Department at (203) 750-3200.

# **GRANTS BY FUND TYPE**



TOTAL: \$24,837,101\*



Let us help you make your charitable giving even more meaningful and effective.

Contact us at (203) 750-3200.

<sup>\*\*</sup>FY23 figures have been audited.

<sup>\*</sup>Includes nonprofit endowment funds

# **Start a Fund**

Nearly 600 people, companies, and nonprofits have set up funds with the Community Foundation. You can start your own fund with \$5,000 or more - and make gifts now to support nonprofits working on issues that matter to you.



Start here:

FCCFoundation.org/CreateFund



Want to learn more? All conversations are offered at no cost, and with no obligation. Contact Joe Collin, VP of Philanthropy, at (203) 750-3200 or JCollin@FCCFoundation.org.



# **New Funds**

When you establish a fund with the Community Foundation, your giving can continue making a difference for many generations to come. We gratefully acknowledge the following funds established over the past year.



# The Salem Lutheran Bridgeport Legacy Fund

This fund was established to support and sustain the designated organization's financial viability and mission.

#### Wendy A. Ryan Scholarship Fund

This scholarship fund supports Bethel, CT high school graduates with a GPA of 3.2 - 3.75 who demonstrate a recognizable social awareness and knowledge about current global issues.



#### The Sharon Orlsoki Fund

Established at the bequest of Sharon Orloski, this fund provides scholarship support for postsecondary education to women studying Life Science fields.

# W. Jeff Polster Memorial Scholarship Fund

This fund provides scholarship support for post-secondary education to students graduating from Ludlowe High School who have an Individualized Education Program or documented disability.



#### Nancy and Gene Celentano Fund

This fund supports eligible public charitable organizations that align with the donors' charitable interests in disadvantaged youth.

# The Clinton Fulton Smith Scholarship Fund

Established by a bequest from Joan S. Kadlec, this fund provides scholarships for Greenwich, CT students with financial need who plan to study Math and/or Science.

# **Donors**

Thank you for partnering to build a better future for everyone in Fairfield County. Your generosity is essential to keeping our mission in motion!

Gifts noted were made from July 1, 2023, to June 30, 2024.

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#### **Get early access**

Receive priority invitations to special learning opportunities and public events.

#### Be in great company

Be recognized in our membership listing, and with a special name tag at events.

#### **Show your support**

Get Allies for Equity swag delivered to you, and share on your social channels.



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FCCFoundation.org/Equity









# We thank and celebrate our inaugural Allies for Equity

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As of June 30, 2024



Fairfield County's Community Foundation is partnering with our community to create a county where every person has an equitable opportunity to thrive. We work closely with community organizations, nonprofits, businesses, and philanthropists to address challenges and identify opportunities to create a stronger, more vibrant community. Informed by three decades of partnering with and serving our community, we have awarded more than \$400 million in grants to nonprofits in Fairfield County and beyond.

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