

# Fiddlehead

Community Foundation of Western Massachusetts

Serving Franklin, Hampshire, and Hampden Counties

Vol. XII, Num. 2, December 2006

## ANNUAL MEETING

# 15th Anniversary

*Lauds Founders, Cites Accomplishments and Inspires for the Future*

**F**IFTEEN PIONEER VALLEY residents got more than a good lunch and entertaining program at the 15th Annual Meeting of the Community Foundation of Western Massachusetts. They left the Log Cabin Banquet House with a serious philanthropic decision to consider.

The program included inspiring and humorous stories of the founders of the organizations, seven heartwarming profiles of those assisted by scholarships and grants, but no one was prepared for a video message from Bill Cosby and Director of Development Katie Allan Zobel filmed at Roberto's Pizza in Greenfield. Their message — told in classic Cosby fashion — was of an anonymous donor who contributed \$15,000 so that 15 randomly selected attendees at the Annual Meeting might recommend \$1,000 grants to Pioneer Valley charities of their choice.

In the last five minutes of the program, Cosby and Zobel, with a cameo appearance by Robert L. Pura, Ph.D., President, Greenfield Community College, directed the audience to “check under your plates for a gold ticket.” The normally sedate lunchtime demeanor erupted in plate moving (some coffee spilling) and a few entrepreneurs checking out the place settings of those who left the meeting early. The



Several of the “gold seal winners,” who will recommend \$1,000 grants to the Pioneer Valley charities of their choice: (from left to right) Mary Hoyer, Amherst; Denise Granger, Springfield; Carla Oleska, Northampton; Constance Clarke, Shelburne Center; Nina Berman, Wilbraham; Michael Korzeniowski, Holyoke.

recipients ascended to the stages as the meeting was closed by new Board Chair, Stephen A. Davis, to the strains of the Hooterville Junkyard Jazz Band.

The point of this unconventional exercise was to “recreate the spirit of those who founded the Foundation and to re-inspire those in our community about philanthropy!”

The charities chosen by these new philanthropists include the arts, education, civic engagement, and human services throughout the Pioneer Valley. Several winners will be continuing the “Giving to the Future” theme, by using their gift to inspire others to give.

Stephen A. Davis, new Chair of the Board of the Community Foundation, and Dr. Carol A. Leary, outgoing Board Chair.



# 15th Annual Meeting

October 19, 2006

Celebrating  
Fifteen Years in the  
Pioneer Valley

## 1991-1992

Almost \$20M in  
supporting assets

\$960,000 in gifts

\$362,536 in grants  
awarded

9 funds

## 2005-2006

\$114M in  
supporting assets

\$9.6M in gifts

\$6.8M in grants  
and scholarships  
awarded

452 funds

Entertainment courtesy  
of The Hooterville  
Junkyard Jazz Band, in  
honor of Rem Lefferts  
who established the Alie  
and Rem Lefferts  
Memorial Dixieland Jazz  
Fund.



Alexandra and Tyler  
Lucey with their parents  
Art and Tami were  
honored as some of our  
youngest donors.



Peggy Woods, Trustee,  
Distribution Committee  
and Development  
Committee Member



Henry M. Thomas III,  
President & CEO, Urban  
League of Springfield, Inc.



Sonia Nieto, Chair,  
Education Committee  
and Trustee



Robert Atkinson, First  
Chair, Board of Trustees



Kamari Collins provides  
support to the African-  
American Achievement  
Fund



Helen "Bunny" Fuller, Trustee and Lucy Atkinson.

The 15 newest philanthropists in the  
Pioneer Valley chose the following organiza-  
tions as recipients of the \$1,000 grants.



College of Our Lady of  
the Elms

Community Involved in  
Sustaining Agriculture

The Community Survival  
Center, Inc.



Cooperative Fund of  
New England

Mont Marie Child Care  
Center, Inc.

New England Animal  
Action, Inc.

Pioneer Valley Symphony

Springfield College

Springfield Girls' Club  
Family Center

Springfield Symphony  
Orchestra

Top Floor Learning, Inc.

Vincent S. and Jane A.  
Korzeniowski Memorial  
Scholarship Fund

Volunteers in Public  
Schools of Westfield, Inc.

The Women's Fund of  
Western Massachusetts

Womanshelter  
Companeras, Inc.

## The newest "Pioneer Valley philanthropists"

Pamela Barnes, Amherst  
Nina Berman, Wilbraham  
Margaret Boyko, Palmer  
Constance Clarke, Greenfield  
Henry E. Geberth, Jr., Springfield  
Denise Granger, Holyoke  
Sally Griggs, Northampton  
Mary Hoyer, Amherst  
Michael Jonnes, Springfield  
Michael Korzeniowski, Holyoke  
Tony Malone, Springfield  
Lisa McMann, Westfield  
Bernadette Nowakowski, Chicopee  
Diana Stiles, Westfield  
One donor has chosen to remain  
anonymous.

**Our Mission:** THE COMMUNITY FOUNDATION OF  
WESTERN MASSACHUSETTS SEEKS TO ENRICH THE QUALITY OF  
LIFE OF THE PEOPLE OF OUR REGION BY: Encouraging  
philanthropy ~ Developing a permanent, flexible  
endowment ~ Assessing and responding to emerging  
and changing needs ~ Serving as a resource, catalyst,  
and coordinator for charitable activities ~ Promoting  
efficiency in the management of charitable funds

# GRANTS



## 5 & Under Initiative Access to Opportunity for Children in Poverty

THIS INITIATIVE SUPPORTS high impact educational programs that enable impoverished families with children five years of age and younger to improve their lives by addressing the root causes of their poverty.

The initiative was launched with a press conference in January to announce this new effort. We are pleased to report the progress in the implementation phase:

Eleven organizations were selected to receive funding:

- Carson Center for Human Services, Inc.
- CARE Center
- Community Action!
- Holyoke Chicopee Springfield Head Start, Inc.
- The Literacy Project, Inc.
- The Salvation Army, Holyoke
- Springfield Day Nursery Corporation
- Springfield School Volunteers, Inc.
- United ARC of Franklin and Hampshire Counties, Inc.
- Valley Opportunity Council, Inc.
- YMCA of Greater Springfield

The selected projects address the root causes of poverty in children age five and younger from several different angles:

- Adult education and job readiness training for parents
- Skill development of preschool children
- Strengthening parent/child interactions
- Strategies and support for early childhood education staff

First year grant awards have been increased to \$620,400 from the original \$587,500 due to additional funds from the Albert Steiger Memorial Fund.

The advisors of the Adult Basic Education Fund, an anonymous fund at the Community Foundation, have dedicated their award for 2006 to a participant from one of the 5 & Under initiative projects. The fund provides a \$500 grant award to support a student in a GED, English for Speakers of Other Languages, or Adult Basic Education classes to continue their educational journey.

To learn more about the 5 & Under Initiative or to provide support, contact Nancy, Mary, or Sheila at 413-732-2858!

## Window of Opportunity for Those 70½

*Pension Protection Act of 2006 (H.R. 4)*

A NEW TAX LAW now permits distributions directly from an IRA without inclusion in either federal or Massachusetts income. While no corresponding charitable deduction is allowed, the advantages of this new arrangement are that such distributions:

- Will count toward any minimum distribution required;
- Are not subject to Massachusetts income tax (which does not allow charitable deductions);
- Are not subject to the phase-out for itemized deductions for high income taxpayers; and
- Will not count toward the maximum charitable deduction allowed.

This arrangement is only available in 2006 and 2007 to those 70½, for distributions totaling \$100,000. Distributions to private foundations, donor advised funds, supporting organizations, charitable remainder trusts, or for charitable gift annuities do not qualify.

This is the ideal time to consider a gift to a permanent fund:

- To remember someone in perpetuity,
- To leave a perpetual source of support for a charitable cause important to you, or
- To support your community forever by taking advantage of the Community Foundation's extraordinary knowledge of its needs and resources.

For more detailed information, contact Kent, Katie, or Kristin at 413-732-2858.

# Carpe Diem

THE COMMUNITY FOUNDATION:  
*Your Secret Weapon for Last-Minute Year-End Charitable Giving*

? *Have you used all of the charitable income tax deduction you wish to take in 2006?*

*All year long, have you harbored a secret desire to be generous to your community?* ?

There are approximately 20 days left until December 31, when your opportunity to deduct charitable gifts during 2006 will expire.

### *Some last-minute ideas:*

- If you don't know what charities you want to benefit, use a donor advised fund or leave the decision-making to the experts at the Community Foundation. Take a charitable deduction now and recommend distributions later, or leave the driving to us.
- If you are 70½ and have assets in an IRA, you can use them for charitable gifts in 2006 with highly favorable tax consequences (please see HR4 information in the panel to the left).

A gift to the Community Foundation's Annual Fund is always a winner. You can direct it to one of our three county grantmaking funds, our scholarship fund, or support for all of our operations. We've enclosed an envelope to make this option easy.



You don't even need an envelope and stamp. Go to the donate now button on our website, [www.communityfoundation.org](http://www.communityfoundation.org).

GO AHEAD, BE GENEROUS  
YOU WON'T REGRET IT

# FUNDS

## New Funds Established

EIGHT NEW FUNDS were established at the Community Foundation from February 28, 2006 through October 27, 2006. \$295,513 in contributions to those funds were received from individuals and organizations.

- Classical High School Class of '55 Fund
- Easthampton Learning Foundation Fund
- Equity for Life, LLC Charitable Fund
- Charles and Mary Hough Charitable Fund
- HSR Fund
- Northfield Mount Hermon Upward Bound Fund
- Connie Celeste Sherman Memorial Scholarship Fund
- Mary Volanakis Memorial Scholarship Fund

## SAVE THE DATE

2007 Investment Forum  
COMMUNITY FOUNDATION  
Investment Policies  
and Performance  
Wednesday, April 25, 2007

## COMPETITIVE GRANTS

Over the past 15 years, over 650 different charities have received grants from the Community Foundation's Competitive Grant program.

Nonprofit 501(c) (3) organizations serving Franklin, Hampshire, and Hampden County residents are invited to submit Competitive Grant applications annually.

2007 Grant Application Deadlines:  
January 12, 2007 at 5:00 p.m.  
August 28, 2007 at 5:00 p.m.

Information and Competitive Grant applications are available in several ways:

online at [www.communityfoundation.org](http://www.communityfoundation.org)  
email [grants@communityfoundation.org](mailto:grants@communityfoundation.org)  
or call the Foundation at 413-732-2858.

One-hour orientations to the Community Foundation Competitive Grantmaking process are offered. The schedule for these sessions is posted on [www.communityfoundation.org](http://www.communityfoundation.org).

# SCHOLARSHIP UPDATE

## Community Foundation Scholarship Alumnae

*Where are they now?*

LEIDA CARTAGENA was the first in her family to attend college. With a Latino Scholarship Fund award to help her through her first year, she graduated from Mt. Holyoke College, and the Boston College School of Social Work. Leida works for the Valley Opportunity Council as Director of Planning and Program Development. Grateful for the support she received, Leida has served on the Board of the Latino Scholarship Association to make the support that was available to her, available to others.



In the last eight years, the Community Foundation's Scholarship and Loan program has assisted over 4,300 students to attend college or graduate school.

*Did you receive a Community Foundation Scholarship or Loan or do you know someone who did? We would love to hear where you are and what you are doing! Please contact the Foundation at [scholar@communityfoundation.org](mailto:scholar@communityfoundation.org) with your name, address, and an update on where you are now!*

## SCHOLARSHIP APPLICATIONS

2007 Applications will be available in January at [www.communityfoundation.org](http://www.communityfoundation.org) to those seeking financial assistance to meet their higher education goals during the 2007–2008 academic year.  
Application deadline is March 31, 2007.

## Community Foundation Scholars Pursue Goals

9% are pursuing an Associate's Degree or Certification  
78% are pursuing a Bachelor's Degree  
13% are in graduate or post-graduate programs (doctorate or JD)

## 2006–2007 Community Foundation Scholars

740 recipients  
\$2.2 million awarded  
1150 awards  
95 funds

## Community Foundation Scholars are Local Students

55% from Hampden County  
17% from Hampshire County  
14% from Franklin County  
14% from other areas

## Over Half Community Foundation Scholars Attend Local Schools

University of Massachusetts – 18%  
Westfield State College – 5%  
Holyoke Community College – 5%  
Western New England College – 4%  
Springfield Technical Community – 4%  
Elms College – 4%  
American International College – 3%  
University of Connecticut – 3%  
Bay Path College – 2%  
Smith College – 2%  
Springfield College – 2%  
Mount Holyoke – 2%

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Recognized throughout  
the region, the young  
fiddlehead fern  
represents both new  
growth and permanence.  
With thousands of  
thriving species, it  
reflects both the  
diversity and strength  
of our community.