

Legacy *Matters*



in this issue: Summer 2021

**Smart Investment:
Diversity, Equity,
and Inclusion (DE&I)**

**Featured Fund:
Julian A. Taylor
Fund**

**Community
Investment:
Stepping Forward
in the Valley**

**Good News
About the Valley:
VCF Awards more than \$200,000
in Scholarship Funding**

Community Investment

Stepping Forward in the Valley

The COVID-19 pandemic has caused significant social and economic impacts across the Valley in terms of jobs, small businesses, healthcare, and education. In addition, it has exacerbated existing inequities and disparities that further divide our community.

In response, the Valley Community Foundation (VCF) is launching Stepping Forward in the Valley, a new three-year initiative to strengthen the weakened safety net for the Valley's most vulnerable, collectively address the social and economic impacts of COVID-19, and advance racial equity. Stepping Forward in the Valley aligns with a larger \$26 million regional Stepping Forward commitment launched in 2021 by VCF's partner in philanthropy, The Community Foundation for Greater New Haven (TCF). Recognizing that different communities have different needs, the two foundations are working together on an integrated plan to help the Valley recover from COVID-19 and to expand equitable opportunities throughout the region.

Stepping Forward in the Valley has four preliminary focus areas:

New equity strategies will be implemented by VCF. These strategies will create new processes and structures that help close existing equity gaps by being more inclusive of people of color and individuals from other under-represented groups. Plans include facilitating community conversations and listening to the voices of those impacted by the pandemic and racism, and discrimination.

VCF will continue to promote the COVID-19 Response and Recovery Fund, which was established in 2020

to address the virus's impact on nonprofits and people in the Valley. The Fund was the result of a collaboration between VCF, Valley United Way, Greater Valley Chamber of Commerce, and the Valley Council for Health & Human Services. The Fund provides flexible resources to organizations that serve the Valley region, especially those disproportionately impacted by the coronavirus.

VCF will also work to strengthen and expand the Valley Early Childhood Poverty Collective Impact Initiative. Childhood poverty is a core equity issue and, according to the 2019 Valley Community Index, more than one-quarter of Valley children ages 0-17 live in low-income households. The Initiative aims to mitigate the root causes of adverse childhood experiences and childhood poverty.

The fourth area of focused investments under Stepping Forward in the Valley involves VCF's grantmaking and capacity building offerings for nonprofits. VCF and TCF are exploring and implementing new efforts to strengthen their joint responsive grants program and to build the capacity of nonprofits so that they can adopt best practices and policies regarding equity. VCF is also looking to expand its capacity building work to more minority-led organizations and associations serving the Valley.

"There has never been a more critical time to commit resources to the Valley so that we can provide support to our region's most vulnerable and foster an inclusive community," said VCF President & CEO Sharon Closius. "We look forward to delivering much-needed resources, creating new systems for opportunity, and making a lasting impact at a local level."

\$566,000 in Multi-Year Responsive Grants for General Operating Support Awarded to Area Nonprofits

Adam Wysota Foundation - \$71,000

Derby Historical Society - \$75,000

Griffin Hospital - \$90,000

Julia Day Nursery - \$90,000

Junior Achievement of Greater Fairfield County - \$100,000

Salvation Army, Greater Valley Corps - \$90,000

Shelton Historical Society, Inc. - \$50,000



A Year of Resilience

VCF's Virtual Annual Reception was held via Zoom in June. Visit valleyfoundation.org to see the presentation, hear about a year in review, learn about the 11 new funds, and watch a special photo montage of hope in the Valley during the pandemic.



Kenya Rutland, Principal and Chief Enthusiasm Officer with KJR Consulting, facilitates the VCF retreat on diversity, equity, and inclusion (DE&I) with members of the Board, Board Advisory Council, and Staff.



As part of the retreat, VCF Board Members learn that a sense of belonging is the natural consequence of diversity, equity, and inclusion.

Smart Investment

Diversity, Equity, and Inclusion (DE&I)

In early September of last year, the Valley Community Foundation Board began a journey to focus on diversity, equity, and inclusion (DE&I) during a retreat held both virtually and outdoors. 2020 Board Chair Donald Smith, Jr. described the gathering as just the first step in a long and difficult conversation. “VCF is committed to moving the conversation forward and incorporating DE&I principles into the foundation’s work in the community.”

Board Member and Governance Chair Jen Magri said, “We took the first step at the retreat and, as a Board, committed to expanding diversity because VCF serves a diverse community. Those demographics continue to evolve over time and we need to make sure that, as a Board, we represent our community effectively.”

Kenya Rutland, Principal and Chief Enthusiasm Officer with KJR Consulting, facilitated the group discussion. “When people come to the Valley, they want to feel they belong here and that what they bring with them matters to the community. The truth is, we live in a world where some have more influence and impact than others and that’s rooted in a long history. The VCF Board had a meaningful dialogue around the question, ‘If we are going to achieve that sense of belonging, what gets in the way?’”

Rutland approached the group by making everyone feel comfortable as they formed a baseline discussion. “We wanted to create a starting point,” he said. “You can’t talk about equity in America without talking about race because that drives so much. We have to recognize that even when we’re not talking or consciously thinking about

race, it is driving decisions and perhaps in a way that is not effective.”

He explained his intent to avoid the trap of speaking in circles. “Our goal was to get to the real problem and identify what needs to change to really make an impact. Until we call out the discrepancies, we won’t move the needle.”

“It’s hard for people to talk about racism because, for many of us, that’s a bad word and we consider ourselves to be good people,” Rutland continued. “For the Board, we considered how we could call that out: our towns are becoming more diverse. How do we make everyone feel included, share the power, and create a space where there is equity and people feel they can make a difference?”

Rutland described recent events such as the pandemic meeting an economic crisis and social movement as a perfect storm forming to highlight a broken social contract.

“Now we’re looking to mend the social contract and change how we view others,” Rutland added. “Laws have an impact on systemic racism but, as we agree there is a social contract, we’re asking what our role is. The Board was willing to learn and engage in a serious discussion, to understand how the rules aren’t the same for everyone. When we understand the concepts and the impact of race and racism, the Board can focus on how to move the needle in the Valley. People can feel a sense of dignity and respect, living a full life here without hiding or assimilating.”

Magri pointed out that ensuring everyone has a voice at the table translates to reassurance that philanthropic dollars are directed efficiently. “VCF has partnerships

Recommended Reading:

Uncomfortable Conversations with a Black Man
by Emmanuel Acho

Beyond Ally
by Dr. Maysa Akbar

An Indigenous Peoples’ History of the United States
by Roxanne Dunbar-Ortiz

The Color of Law
by Richard Rothstein

The Inclusion Paradox
by Andrea Tapia

Making Diversity Work
by Sondra Thiederman

Smart Investment

Diversity, Equity, and Inclusion (DE&I)



Convening at Holy Ghost Park in Shelton, members of the VCF Board, Board Advisory Council, and Staff gathered outdoors and socially distanced to participate in this retreat. Several attendees also participated via Zoom. This represents a single step in a long journey for those close to VCF to establish a meaningful dialogue about race and evaluate how the Foundation can best serve all those who make up our community.

and the community index to guide our strategic plan but there are still underrepresented people and communities. We need to do a better job of outreach so they know what's available and we understand how to interact with them to provide opportunities and funding. The Board can serve as a facilitator to make sure those conversations happen.”

Characterizing the work as a journey more so than a sprint or even a marathon, Magri feels the Board will evolve over time so long as members are willing to listen and learn with an open mind. “VCF’s former Governance Chair James ‘Jim’ Hodge was instrumental in getting this work started.” Although Jim passed away in July of 2020, his legacy has had a significant influence in the Board’s DE&I work. “He inspired me to do this retreat, asking for an interactive experience that would help the Board understand history. He said, ‘Until people understand history and diversity, equity, and inclusion, they can’t know where they are going,’” Magri said.

Magri noted that race has been making the headlines but the issue

is all-encompassing. “We have to make sure we don’t forget that DE&I includes any marginalized group. We can’t overlook people who face challenges because they are disabled or because of their sexual orientation,” she said.

Chris Grizzle, a new VCF Board Member, attended the retreat via Zoom. “I served in the military for 28 years and have participated in many, many DE&I sessions. This was absolutely amazing and the best I’ve ever attended because there was no preaching.”

He thought the videos and factual information presented were thought-provoking. “Not a lot of the audience members were aware of what’s happened to African Americans in the past. Eyes were opened as they learned, yes, that really happened. The presentation made it easy to find more information and I think people did their own research after the retreat.”

Smith noted that issues such as racism will be given attention as the Valley becomes increasingly more diverse. “DE&I issues are

becoming more apparent and some of us have experience in this area,” he said. “Others are coming from a different viewpoint. As we plan future conversations, it’s critical that we know where each of us is coming from and have a common understanding. Kenya did a great job with a delicate subject, laying the groundwork and providing us with history which, frankly, isn’t taught in school.”

Magri sees her role as helping to ensure a successful first step. “I’m filling in where Jim left off to make sure the work continues. DE&I was certainly his passion and he was extremely excited about the prospects of the Board learning. Jim and I had great conversations and talked about topics such as the barriers against kids achieving success and where to start working on those barriers to make a difference. We agreed there has to be a multi-pronged approach.”

Smith agreed. “We know we have a lot more work to do. This initial conversation was just setting the table. More discussions will include community conversations as we shed light on this very important topic.”

Featured Fund

Julian A. Taylor Fund

There are some people who make an impact in the community during their lifetime that the community can't help but give back in their honor after they're gone. One such person was the Rev. Dr. Julian A. Taylor.

Dr. Taylor, who was pastor of Macedonia Baptist Church for 42 years and founder of the Naugatuck Valley branch of the National Association for the Advancement of Colored People, (NAACP), where he served as president for 33 years. At the time of his death, he was vice president at large of the National Baptist Convention of the United States, and was a former member and president of the Connecticut Baptist Missionary and the New England Baptist Training Union.

VCF Board Member, Diane Stroman, grew up in Dr. Taylor's church. "We called him a scholar, teacher, civil rights leader, community activist, politician, and mentor to young people," she said. "He was the type of person who could have a conversation with anyone, but he probably spent most of his time counseling students in Ansonia, encouraging them to set their sights on acquiring as much education as possible."

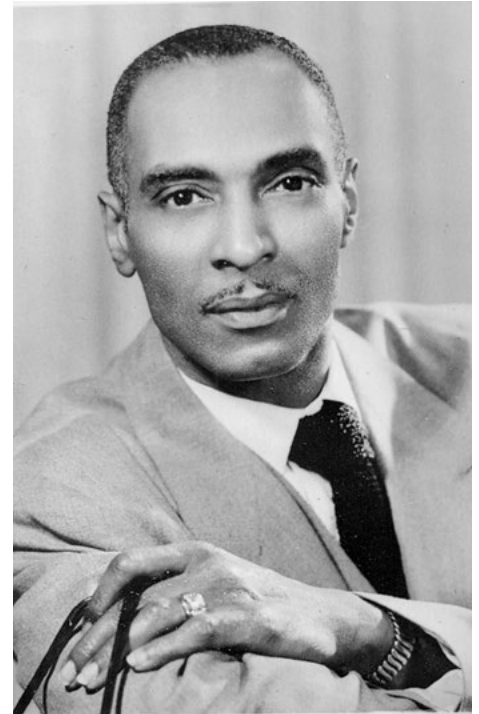
After his passing in 1981, his family reached out to the community to

pull together the funds that would offer an annual \$1,000 scholarship to the highest-ranking African American student from Ansonia High School with grade B or better, going to four-year college or university.

In 2005, given the strong ties to the community and impact of the scholarship, the committee worked with VCF to secure the future of the scholarship and established the Julian A. Taylor Fund. Today, the fund committee distributes a \$5,000 scholarship each year. Then in addition, the JAT Scholars program, which started in 1988, awards \$100 to the highest-ranking students in grades 3 to 11, to encourage them to do their best and maybe the recipient of the college scholarship.

Diane currently chairs the committee that has taken on the work of continuing the scholarship fund after the Reverend's family moved away from the area. "We're the workers but it's really the community that makes this happen by preserving his memory and his mission to help kids."

Many past scholarship recipients contribute to the fund annually and one has committed time to the committee. Diane noted, "Six children from one family became JAT Scholars and went on to become nurses and lawyers.



Rev. Dr. Julian A. Taylor

We see them when they participate in the annual awards dinner."

Diane remembers Dr. Taylor as a distinguished and debonair gentleman - born in North Carolina and educated in Washington D.C. with degrees from Howard University and Columbia University - and someone who inspired her. "When you have an individual who takes time to do things for you as you grow up, you turn around and give back that back to your community. I think education is the key to anyone's success and I want to see our students succeed."

Planned Giving

VCF welcomes Dayne & Dawn Bachmann, Twan & Karen Bentlage, Patricia Dziuba, Joseph Pagliario Jr., and Jack Walsh to the Gates Society, the Foundation's planned giving community.

Your planned gift will impact the charities you're passionate about forever, regardless of the amount. Call us at 203-751-9162 or learn more at valleyfoundation.org





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Good News About the Valley

Valley Community Foundation Awards more than \$200,000 in Scholarship Funding to Support Educational Pursuits of Local Students

With the 2020-2021 school year complete, VCF is pleased to announce that it has distributed \$202,595 in the form of 96 awards from 79 scholarship funds to students pursuing higher education. While many of these students are entering their first year of higher education this fall, some awards provide renewable tuition assistance for up to four years.

“As we regain some semblance of normalcy following the pandemic and most students return to universities in full capacity this fall, many young adults will receive much-needed support to offset the increasing costs of tuition,” said Sharon Closius, VCF President & CEO. “Whether it’s participation on a sports team, preserving family history, or memorializing lifetime friendships that were made, establishing a scholarship fund at VCF to benefit graduating high school seniors in the region is an investment in our community’s future and reflects the importance of higher education.”

VCF has worked with the Valley’s high schools over the past several years to manage and administer scholarship funds. Rather than a high school holding the scholarship money in a CD or savings account, scholarships are established, managed, and invested with VCF. The high school continues to select the

recipients of various scholarships, but the school staff saves time and resources by not administering individual savings accounts. Additionally, the money is invested in a large investment pool with VCF’s partner in philanthropy, The Community Foundation for Greater New Haven, which has historically yielded better returns and increased the size of the fund and the distributable amount over time.

Scholarship funds are most often created in memory or in honor of someone special. In addition, organizations and alums will set up scholarships as a gift to support the youth and the future of the community. Donors can define eligibility requirements for the scholarship such as the student’s field of study, academic achievements, extracurricular activities, financial need, background, or geography. Some scholarships give a single award to support a graduating senior pursuing higher education while others can be renewable throughout college.

If you are interested in establishing a scholarship fund that can benefit a local graduating senior each year, contact Sharon Closius, Valley Community Foundation President & CEO, for more information at 203-751-9162 or visit www.valleyfoundation.org.