

*New Canaan Community Foundation
Post Office Box 1285
New Canaan, Connecticut 06840
203-966-0231
www.newcanaancf.org*

Upcoming Event

NCCF Luncheon to benefit the
Foundation's Fund for Children and Youth.

Friday, September 30, 2005

from 11:30am to 1:30pm
at the Country Club of New Canaan.

Please call the office at 203-966-0231 for
more information or if you would like to
receive an invitation.

Annual Report 2004

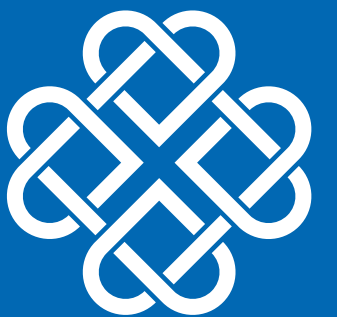
The mission of the New Canaan
Community Foundation is to
promote community philanthropy
and help donors achieve their
charitable goals.



NEW CANAAN
COMMUNITY
FOUNDATION

New Canaan Community Foundation
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New Canaan, CT 06840

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Front row, seated: Tom Turrentine, Elizabeth Ker, James B. Duffy, Sara Daniel, Cindy Charas

Back row, standing: Christopher Snyder, Jane Gamber, Robert Albus, Ann Peloquin, James E. Malling, Judy Bentley, Joseph Dionne, Julianne Grace, Dick Bond, David Kilbride, Bill Walbert

Not shown: Stuart Lovejoy, Brian Moran

NCCF thanks Congdon + Company for the generous donation of their design services for this report.

From Tom Turrentine, President and Cynthia Gorey, Executive Director

We are honored to share the New Canaan Community Foundation's report on our activities during 2004. Thanks to everyone who contributed to our Unrestricted Endowment Fund, established a component fund, or named NCCF as a beneficiary in their estate plan or memorial gifts, we will continue to be a source of support for local non-profit organizations and to work with donors to achieve their philanthropic goals.

As we work to promote community philanthropy in New Canaan, and help local donors achieve their goals, we continue to try and serve our donors and our community better. We are focusing on creating new ways to meet our community's needs by linking donors directly to agencies, encouraging pass-through grants from private foundations, and encouraging donors to establish their own philanthropic fund.

Grant Update

We shifted the deadline for non-profit organizations seeking a grant from our endowment fund, and now accept grant proposals until February 1st. This new schedule enables our Board to focus their energies on development activities in the fall, and help enable more funding of community needs. We alerted local non-profits of the change in advance of the previous grant application deadline. The Foundation makes grants from its unrestricted endowment fund for new projects and capital needs, and not for operating support, so organizations do not rely on NCCF for funding daily program essentials. Although there was no distribution cycle in 2004, we made several out-of-cycle grants, based on a compelling need for more immediate funding. These awards are detailed in the report, as are distributions from the component funds of the Foundation, and a pass-through grant.

Staff News

NCCF welcomed Debbie Simpson as our part-time Director of External Relations in April. Debbie served on the Board of Directors for 6 years, retiring in 2003. She works with the Board and our part-time Executive Director to lead the Foundation's donor services efforts.

Development Highlights

The Foundation received a generous bequest from the estate of Marshall and Prudence Montgomery, longtime residents of New Canaan. Their gift of \$50,000 was added to our unrestricted endowment as a testament to their enduring support of the Foundation. We ended the year by working with Chase and Wendy Carey to establish a Donor Advised Fund for their family. We will assist them in distributing grants from their fund to important programs in our community. Finally, we received numerous memorial gifts in honor of Frank Frederiksen. We are grateful to his family for acknowledging his love of New Canaan through gifts to the Foundation.

Investment performance

The NCCF endowment was valued at \$4.8 million at the end of 2004, representing a positive total return as measured against major market indices. Our professional investment managers are selected based on their demonstrated ability to achieve solid risk-adjusted returns over the long term. Merrill Lynch advises the Foundation in selecting equity managers for the endowment accounts.



NCCF made a grant to New Canaan Fire Company No. 1 from the Ruth T. Noble Advised Fund, for unrestricted support.



Grants from the Noble Fund have also supported New Canaan Town Players for over 20 years. This funding enables the production of exciting community theater like "Jack and the Beanstalk".

Directing Grants Where They Are Needed Most

Like all community foundations, the New Canaan Community Foundation is a tax-exempt public charity serving individuals in a community who share a common goal: to improve the quality of life for others. NCCF manages a community endowment and administers component funds set up by individuals connected to our community. Grants are made from these funds to non-profit organizations, based on the donor's recommendations or to address current needs identified by the Foundation. The growth of each fund provides an ever increasing endowment and granting capability for our community and beyond.

Community foundations monitor diverse community needs: art and culture, education, environment, health, human services, and recreation. NCCF supports high-impact opportunities that will benefit our community; helps establish new organizations to address unmet needs; and directs funds to serve changing community needs. To accomplish these philanthropic goals, the Board and staff at NCCF are well acquainted with the needs of area residents, and those organizations that are best suited to meet those needs. Since 1977, NCCF has granted \$3.2 million to qualified non-profit organizations.

NCCF's 2004 Grants

With the change in the grant calendar, there was no annual grant cycle in 2004. Several out of cycle grants were made, as well as distributions from the Ruth T. Noble Fund, a donor advised fund.

Hand-In-Hand Foundation \$15,000

Camp Hand-in-Hand is a new, community summer day camp located at the St. Mark's Church facilities. The NCCF grant was used to offset the camp's start-up costs in its inaugural summer of 2004. The camp brings together children between the ages of 5 and 8 from diverse economic, ethnic, cultural, and religious backgrounds in a supportive environment in which children join together to build friendships, learn about and accept their differences, and learn to help and care for others. A portion of this grant, \$900, is from the Fund for Children and Youth, a designated fund at NCCF.

Domestic Violence Partnership, New Canaan \$ 450

This new partnership was formed as a result of the dramatic increase in domestic violence calls to the local police department. Member agencies include the New Canaan Police Department, Departments of Human Services and Youth Services, and the Domestic Violence Crisis Center. The mission of the collaborative group is to reduce the incidence of domestic violence in Town, to facilitate the delivery of services, and to increase awareness of the problem. The NCCF grant purchased a banner that will hang in Town every October, proclaiming Domestic Violence Awareness Month.

Domestic Violence Crisis Center, Norwalk \$ 5,000

The goal of the DVCC is to break the cycle of domestic violence through counseling, advocacy, safe housing, education, and increased public awareness. Since 1980, the DVCC has served individuals and families affected by domestic violence. The pass-through grant from the Dionne Foundation funded several educational sessions in Town. Training programs were provided to the police department and town officials involved in the new Domestic Violence Partnership, High School teachers, parents, community groups, and Middle School students.

New Canaan Library has received support from NCCF's endowment fund and the Noble Fund. Keeping their technology available to all residents is a priority of both the Library and the Foundation.



Food Bank of Lower Fairfield County, Stamford \$ 1,000

The Food Bank has provided nutritious food to non-profit organizations that feed the hungry in New Canaan, Darien, Norwalk, Greenwich, Stamford and Wilton for twenty years. They obtain bulk food, store it in their warehouse, and distribute food to programs that work with our poorest neighbors. They also work to raise awareness about hunger and to combat the causes of hunger in the communities they serve. The NCCF grant was used toward the purchase of a walk-in freezer, to store turkeys for holiday dinners, as well as fresh fruits, vegetables, and other perishables.

The New Canaan Family Fourth \$ 2,200

The Family Fourth committee organizes the annual fireworks display and family celebration of the Fourth of July in Waveny Park. This event has been a community tradition for 25 years. This grant from the Fund for New Canaan Designated Fund to purchase a new speaker system will improve the range and sound quality for music and announcements.

Ruth T. Noble Fund Grants \$ 5,000

This donor advised fund makes grants to support operating expenses at non-profit organizations that were important to Ruth T. Noble, who established the fund.

Dartmouth College Alumni Fund	\$ 1,000
Nursing and Home Care	\$ 300
New Canaan Fire Company No. 1	\$ 200
New Canaan Volunteer Ambulance Corps	\$ 300
New Canaan Town Players	\$ 1,200
St. Mark's Church	\$ 1,200
United Way of New Canaan	\$ 200
New Canaan Library	\$ 200
Trickle Up Program, NYC	\$ 400

Summary of 2004 Grant Distributions

Unrestricted Endowment	\$15,550
Fund for Children and Youth	\$ 900
Dionne Foundation Pass Through	\$ 5,000
Fund for New Canaan	\$ 2,200
Ruth T. Noble Fund	\$ 5,000

TOTAL 2004 Grants \$28,650

Financial Management at NCCF

The NCCF has an established investment policy aimed at maximizing total returns while preserving capital, by making prudent investment choices and diversifying the portfolio to cushion assets against losses in value. A copy of the policy can be obtained from the Community Foundation's office. The document provides explicit guidelines for the investment portfolio that control the level of risk assumed and ensure that assets are managed in accordance with stated objectives.

Who Handles the Community Foundation's Investments?

The Finance Committee of the NCCF Board of Directors is responsible for overseeing the outside investment management firm's performance. These objectives are accomplished using a portfolio of fixed income and equity investments in a total mix which has been assigned to each manager and which the Committee feels is conducive to participating in rising markets while allowing for adequate protection in falling markets. Currently NCCF funds are managed by Merrill Lynch based on the following asset allocation targets and ranges:

Investment Category	Long Term Target	Range
Equities	60%	55% – 65%
Fixed Income	35%	30% – 40%
Cash Equivalents	5%	0% – 10%

The equity portion of the Foundation's portfolio is managed by at least three different managers with complementary styles. No one manager accounts for over 45% of the Foundation's total equity exposure. The investment policy establishes criteria to monitor and evaluate the performance results achieved by the investment managers, and make any necessary changes regarding these managers.

In addition, the Finance Committee has the specific responsibility to review the investment policy and guidelines at least annually and make recommendations to the Board on revisions as appropriate. It evaluates investment results in the context of predetermined performance standards at least twice a year and recommends corrective action as needed, and monitors adherence to policy guidelines.

A copy of our audited financial statements is available from the NCCF office by request.

Donors 2004

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ING Community Matching Gifts Program
Pfizer Foundation
Towers Perrin Matching Gifts Program
Verizon Foundation
Wachovia Foundation Matching Gifts Program

* Gift designated to Fund for Children and Youth
† Established Carey Children's Fund, new donor advised fund
° Memorial gift in honor of Frank Frederiksen



A grant from the NCCF endowment fund helped establish Camp Hand-In-Hand, a new summer day camp. The camp brings together children of diverse backgrounds.

Options for Donors

NCCF offers several options to assist donors in reaching their philanthropic goals. Some donors choose to contribute to NCCF's Unrestricted Endowment Fund from which annual grants are distributed to worthy non-profit organizations serving our community. Donors to this fund express their desire to have their contribution, regardless of size, make as significant an impact as possible in the community. NCCF's annual grants from this fund have meaningful influence in our area.

Contributions may also be directed to NCCF's Fund for Children and Youth which was established in 1993 by an anonymous donor. This fund is for donors who are interested in directing their contributions to support programs and initiatives designed to further the educational, social and recreational needs of New Canaan children and youth.

Other donors prefer to create a component fund at NCCF. Separate fund options include the popular Donor Advised Fund which enables donors to stay involved in the uses of their fund by making recommendations for grants from their fund. Other choices available are Field of Interest or Designated Funds. NCCF also offers donors the flexibility of creating a grant making fund over time with the Acorn Fund option. The NCCF Board and staff are available to assist any donor in determining which fund will best suit their philanthropic interests.

NCCF also works with donors who would prefer to name NCCF as a beneficiary in their estate plans. Bequests or charitable trusts can be used to make an unrestricted contribution or establish a component fund. NCCF welcomes the opportunity to work with a donor's professional advisor regarding these plans.

Private Foundations have the opportunity to work with NCCF with the option of pass through grants. Contributions from a private foundation are "passed through" NCCF to worthy non-profit organizations. This alliance is one example of how NCCF works to connect donors to important community projects that need funding.

Contributions of any size are most welcome and may be in the form of cash, publicly traded securities, closely held stock, real estate, or retirement accounts or life insurance with the Foundation as beneficiary.

For more information or to discuss fund options, please contact NCCF's Executive Director, Cynthia Gorey, at 203-966-0231.

Guidelines for grant applicants seeking funds from the NCCF Unrestricted Endowment Fund

The Community Foundation makes grants from our endowment fund that enable tax-exempt organizations to begin new projects or programs that meet the needs of the New Canaan community. NCCF also supports capital projects with significant and lasting impact on the Town. Grants are not given to maintain current programs, to support operating budgets, to upgrade existing technology, or to fund endowments or expenses already incurred. The Foundation supports innovative proposals and provides seed money for creative approaches to improving our community.

The Foundation accepts grant proposals until February 1st. Grant awards are made at the Foundation's distributions meeting in May. Under special circumstances, and at the discretion of the Board of Directors, an application may be reviewed outside the annual cycle.

Grant Applicant Information

About the Proposed Project or Program: Please give us a general description of the proposed activities. Tell us the amount of the grant request with a detailed program budget, who will benefit, and who will assume responsibility for carrying out the project. If the proposed project involves more than one organization, written evidence of collaboration must be submitted with the application.

Some Background Information about the Organization: Explain the stated purpose of the organization and give us a brief history. Provide a list of management personnel and board members with home towns, and a copy of your IRS tax-exemption letter. Tell us how you use volunteers.

Financial Information: Provide one copy of the organization's current operating budget and financial statements. Tell us about planned sources of continued project funding beyond the NCCF grant. Describe other sources of support and how any previous NCCF grants have been used.

Grant Application Format

The narrative portion of requests should not exceed 5 pages; pages must be 8.5 x 11", 3-hole punched, with no staples. Please send 20 copies of the completed application narrative and the grant proposal cover sheet, including the program budget.

Additional Information and Reporting

Applications are reviewed by the Foundation's entire Board of Directors. To do a thorough investigation of the grant request, the Foundation will schedule a site visit to the organization, and may request that you make a presentation to the Board. If a grant is made to your organization, you are required to provide a photograph related to the funded activity and submit a grant follow up report.