Our first 90 Years
Message from Linda J. Kelly, President

This year marks the 90th anniversary of the Hartford Foundation for Public Giving.

To kick off the year-long celebration, this issue of Conversations steps back in time to 1925 to recall the formation and early days of the Hartford Foundation.

It was the decade historians call “The Roaring Twenties,” an age of dramatic social and economic change. Prohibition was in full force. Radio was the technological wonder of the day. You could buy a Model T from Henry Ford for under $300. The nation’s wealth more than doubled that decade.

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Building Our Foundation

Headlines in the Dec. 10, 1925 issue of the Hartford Courant told readers that the weather was going to be cold, that the League of Nations was debating arms control in Geneva, and that President Calvin Coolidge had just submitted a new budget to Congress.

There was also an interesting headline tucked in a corner of Page 16:

**Two Trust Companies**
**Form Foundation**
**For Public Giving**

The seven-paragraph story was, in effect, the public announcement of the birth of the Hartford Foundation for Public Giving.

From that modest start, the Hartford Foundation in 2015 has planned events throughout the year to mark nine decades of philanthropy that has contributed to improving the quality of life in Hartford and 28 surrounding communities.

The establishment of the Hartford Foundation closely followed the birth of the public foundation concept in the United States. The idea was developed in Cleveland in 1914 by banker and lawyer Frederick H. Goff.

Goff’s vision was to pool the charitable resources of philanthropists into a single, permanent endowment for the betterment of the city. Community leaders would then forever distribute the interest generated by the trust to fund charitable purposes. It wasn’t long before the idea was duplicated in Chicago, Boston, Minneapolis and New York.

In Hartford, the idea captured the imagination of two bankers, Maynard T. Hazen of the United States Security Trust Company, and Clark T. Durant of the Hartford-Connecticut Trust Company. They persuaded the 1925 Connecticut General Assembly to include, among the approximately 700 laws it passed that year, legislation authorizing a community foundation.

The Dec. 10, 1925 news story was published only days after the two Hartford trust companies adopted an agreement outlining in detail the “administrative machinery establishing for what they have entitled...The Hartford Foundation for Public Giving.” Within weeks, each of the other 11 bank and trust companies then in Hartford adopted the same resolution.

The rest, as the saying goes, is history. But it did take time for Hartford’s new
foundation to begin to have an impact. It wasn’t until 1934 that enough bequests had been made to begin to produce income. The first gift, of $1,000, was received in 1930 from the estate of J. Warren Harper, a local dentist and world traveler. The second, $6,128, arrived in 1933 from the estate of department store merchant John F. Baker.

Finally, in 1936, the first grant was awarded—$982.52, all that was available—to the Watkinson Library, a financially-strapped research library that still exists as part of Trinity College.

The second grant—$828, again, all that was then available—was awarded to the Community Council of the Capitol Region to study population shifts following the great flood of 1936 that put large portions of Hartford under more than eight feet of water. Seven social service agencies used the study to determine where help was most needed.

The second grant also established a key precedent: the Foundation would make grants that enabled agencies to improve the delivery of important services to people in need, but the Foundation would not deliver the services itself.

Now, 90 years later, after thousands of grants totaling more than $600 million have been awarded, the Hartford Foundation remains committed, as the Dec. 10, 1925 Hartford Courant story announced, “to the effective management of funds devoted to public charitable purposes...for education, scientific research, care of children and invalids, recreation and betterment of living conditions.”

Governing Authority

A “unique provision of the resolution” establishing the Hartford Foundation, reported the Dec. 10, 1925 Hartford Courant, was the establishment of a board of prominent citizens for “the important duty of directing the distribution of the income from all gifts held in the foundation, so that the wishes of the donor may be accomplished without limitation as to time and in spite of unforeseen changes in circumstances and conditions.”

Today, appointments to the nine-member board of directors include recommendations from the Hartford Consortium for Higher Education, the Chair of the MetroHartford Alliance, the Chair of the United Way of Central and Northeastern Connecticut, the Chief Justice of the Connecticut Supreme Court, the Judge of Probate Court for the District of Hartford, and the Trustee Banks.
As part of our 90th anniversary celebration, we are collaborating with WNPR on an innovative project to collect stories of giving and receiving from the Greater Hartford region.

“We are trying to expand the understanding of the word ‘philanthropy’ through this project so individuals recognize better that we are all philanthropists and recipients of philanthropy—which, really, just means ‘love of humankind,’” said Linda Kelly, Hartford Foundation president. “The project seems a fitting way to mark 90 years of the Hartford Foundation’s work bringing together donors, nonprofit agencies, professional advisors and community and business leaders to improve the quality of life in the region.”

Anyone who has a story—of giving or receiving—is encouraged to visit WordsToGiveBy.org to sign up to tell it. Now through April 2, participants will share their stories in mobile recording studios in sites throughout Greater Hartford.

Twenty-nine stories will air on WNPR from April through December, 50 will be featured on WordsToGiveBy.org, and all of the stories will be archived for listening on the Hartford Foundation’s website. They all will also be archived for listening in libraries throughout the Foundation’s 29-town service area.

Linda Kelly and Jerry Franklin, president and CEO of the Connecticut Public Broadcasting Network, were proud to launch Words to Give By, a community storytelling project.
Hartford resident Maria (far left) and her three children were happy to share their acts of everyday generosity.

In this innovative collaboration, “Words to Give By” will offer stories that would otherwise go unnoticed but that illuminate the compassion and kindness that surround us—everyday generosity. To learn more about this project, visit WordsToGiveBy.org.

Share Your Story!

Anyone with a story to share is invited to sign up to be interviewed at one of our Greater Hartford area locations. Visit WordstoGiveBy.org or call 860-275-7550 to sign up.

Upcoming Words to Give By recording sessions:

**Suffield / Windsor Locks**
Saturday, March 28
Suffield Volunteer Ambulance Association

**East Windsor / South Windsor**
Tuesday, March 31
South Windsor Public Library

**Glastonbury / Marlborough**
Thursday, April 2
Welles Turner Memorial Library
Launching a Life of Philanthropy

The Peter Jung Scholarship Fund was established at the Hartford Foundation in 2014.

Peter Jung is a 20-year-old sophomore at Trinity College in Hartford. He is a native of Bellevue, Washington, where he attended a public magnet high school and earned an International Baccalaureate diploma and was an Advanced Placement Scholar with Distinction. At Trinity, he is on track for a biology/computer science double major. In his free time, he enjoys reading, traveling and cycling around the Pacific Northwest. He has also cycled in Ireland, Spain and Japan.

What motivated you to become involved in philanthropy?
The motivation was a gift from my father, who challenged me to explore the world of charitable giving. When I learned I would have money to philanthropically invest, I knew that I wanted to invest in Hartford. As part of the process of embracing my new home for the next few years, I wanted to establish a connection to the local community.

Why did you start a college scholarship fund?
Education is very important to me. I have been blessed with many first-rate educational experiences. I will concede that college is not for everyone but for many people it can open doors, expand horizons, and forge lasting relationships. Unfortunately, due to financial and academic pressures, it is also harder for people to get into college than ever before. I believe we will see a massive overhaul of the American collegiate system in the next decade that will further democratize the process. Until then however, I want to do my part to ensure that a sizable population of young men and women are not overlooked.

Why did you choose the Hartford Foundation?
When it comes to Hartford, the men and women at the Hartford Foundation for Public Giving are simply the best at what they do. They have great pride in the beauty and rich history of the Hartford area and exhibit a deep understanding of the great challenges the city and the region faces. In the arena of public giving it is often difficult to determine who to trust and who will use your money most effectively and honestly. With the Hartford Foundation I know I am in sure hands.

How will you proceed with your philanthropy?
I would like to base my charitable work on two precepts: optimization and personal growth. Optimization means I will focus on organizations and causes with a narrow scope where I can make the greatest impact. Personal growth means that I want to be involved in the causes that I sponsor. Rather than simply writing a check, I hope to meet and learn from the people who will benefit from my donations.
Why would you encourage other young people to be philanthropic?

Philanthropy can endow a person with knowledge and skills that are not limited to the world of charitable giving. You learn about what challenges exist in the world and what people are trying to do to confront them. At a time where the wealth gap is greater than it was in the Gilded Age of Rockefeller and Carnegie, there is also an unfortunate lack of people who are informed about the issues we face as a nation and as citizens of the world. It seems that there is always a lot of noise but rarely any real action. It is a shame but it is also not too late. With the technology and methods of global communication available to my generation, we have the capacity to better the world faster and smarter than ever before. Only time will tell if we are able to rise to the challenge.

Through the generosity of donors like Peter Jung, last year, the Hartford Foundation awarded more than $1.3 million in scholarships to residents of our community attending two-year and four-year colleges and universities.
Hartford Foundation: Over the Years

In **1936**, the inaugural grantmaking year — $982.82 awarded to 1 grantee.

In **1942**, the first scholarship fund was established at the Foundation. There are currently 133 scholarship funds at the Foundation, which annually awards over $1 million in scholarships.

In **1980**, the Foundation officially expanded its service area. The Foundation currently serves 29 towns in Greater Hartford.

The Foundation at **30 (1955)**:
Grantmaking: $287,789
Endowment: $7,556,043

The Foundation at **60 (1985)**:
Grantmaking: $6,577,634
Endowment: $89,810,723

The Foundation at **90 (2015)**:
Grantmaking*: $33,009,897
Endowment*: $934,212,141

*As of Dec. 31, 2014 (unaudited)

To date, the Foundation has awarded $634.2 million to 2,046 grantees.
New Funds and Planned Gifts

JULY 1 THROUGH DECEMBER 31, 2014

Mary Gay Creedon Fund, an unrestricted fund established through the estate of Mrs. Mary Gay Creedon to provide broad support to the Greater Hartford community.

John David Creedon Fund, a field of interest fund established through the estate of Mr. John David Creedon to support basic human needs.

The Walter S. Kapala Scholarship Trust, a scholarship fund established through the estate of Walter S. Kapala to support students who have graduated from high schools in West Hartford and Hartford.

Beverly Beach Eaton and Edward C. Eaton, Ill Fund, an unrestricted fund established from a charitable trust to support the existing needs of the Greater Hartford community.

Janice and Kerry Foster, Sr. Scholarship Fund, a scholarship fund established to support students who have graduated from a high school in the Greater Hartford region who are pursuing an undergraduate degree on a full-time basis.

Frederick L. Mitchell Fund, an unrestricted fund established to provide general support and address the immediate needs of the Greater Hartford community.

Mary A. Huber Fund, an unrestricted fund established through the estate of Mary A. Huber for the benefit of the Greater Hartford region.

June Miller Rosenblatt Community College Scholarship Fund, a scholarship fund established to support the Community College Scholarship Endowment Program.

June Miller Rosenblatt Scholarship Fund, a scholarship fund established to support the General Scholarship Endowment Fund Program with a preference to students who express or demonstrate an interest in pursuing a career in teaching or education.

Henrietta T. Shaw Fund, an unrestricted fund established through the estate of Henrietta T. Shaw that will help address the most pressing needs in the Greater Hartford region.

Anthony S. and Evelyn L. Hulme Charitable Fund, a donor-advised fund established under the trust of Joan S. Matthews.

Bartlett Family Scholarship Fund, a scholarship fund established to support students who have graduated from a high school in the Greater Hartford region and have been or are current participants in a Big Brothers Big Sisters program.

Fechtor Family Foundation Fund, a donor-advised fund established upon the termination of the Fechter Family Foundation.

Stanley D. and Hinda N. Fisher Scholarship Fund, a scholarship fund established upon the termination of the Fisher Foundation, Inc. to support students in the General Scholarship Endowment Fund Program.

Stanley D. Fisher Scholarship Fund, a scholarship fund established upon the termination of the Fisher Foundation, Inc. to support graduating seniors from the William H. Hall High School.

Stanley D. and Hinda N. Fisher Fund, a donor-advised fund established upon the termination of the Fisher Foundation, Inc.

Reba and Arthur Nassau Fund, a build-up fund established to provide unrestricted broad support to the Greater Hartford community.

Tom and Margah Lips Fund, a donor-advised fund created by Tom and Margah Lips to provide support to the Greater Hartford community.

Westley V. Thompson and Rosemarie E. Thompson Fund, a donor-advised fund established through a Charitable Lead Annuity Trust to support the Greater Hartford community.

Planned Gifts

An anonymous couple established two individual charitable gift annuities, which will provide a fixed source of income during their lives. Thereafter, 85 percent will be added to the Carol Childs Memorial Fund, an unrestricted fund that provides broad support to the Greater Hartford community with a preference for educational needs in the Hartford School system and charitable projects in the Town of Suffield, and 15 percent will be used to establish the Carol Alcorn Fund, a fund that provides broad support to the Greater Hartford community.

Blair Childs established a charitable gift annuity, which will provide a source of guaranteed income and create a legacy for the community. At the end of the annuity, 85 percent will be added to the Carol Childs Memorial Fund, an unrestricted fund that provides broad support to the Greater Hartford community with a preference for educational needs in the Hartford School system and charitable projects in the Town of Suffield, and 15 percent will be used to establish the Carol Alcorn Fund, a fund that provides broad support to the Greater Hartford community.

Richard “Dick” and Jane Thompson established a charitable gift annuity, which will provide a source of guaranteed income and create a legacy for the community. At the end of the annuity, 85 percent will be added to the Richard E. and Jane B. Thompson Fund, a designated fund to provide support to the Manchester Area Conference of Churches, and 15 percent will be added to the Hartford Foundation’s unrestricted endowment.

South Windsor Historical Society Endowment Fund, an organizational endowment fund established by Mary B. Shepard to be used to further the Historical Society’s mission of preserving the history of the Town of South Windsor.
Area superintendents discussed their work to promote educational equity at the Foundation’s Celebration of Giving. Pictured are (left to right): Linda Kelly; Nathan Quesnel, East Hartford Public Schools superintendent; Susan Bell, Windsor Locks Public Schools superintendent; James Thompson, Bloomfield Public Schools superintendent; Yvette Meléndez, Hartford Foundation board chair; and Sara Sneed, Hartford Foundation director of education investments.

Hartford Foundation board member Thea Montañéz (right) poses with Eileen Kaplan. Eileen attended a recording session at Hartford Public Library to share her story of everyday generosity for Words to Give By.

Richard Sussman, director of early childhood investments, offered testimony before the Connecticut General Assembly’s Human Services Committee in favor of legislation intended to provide parents with better access to affordable, high-quality job training; adult education; childcare and other supports to allow them to better care for their children.

Sarah Durham, president of communications firm Big Duck, addresses a crowd of local nonprofit staff and board members at “Brandraising: How Nonprofits Can Raise Visibility and Money through Smart Communications.” The workshop was presented by the Foundation’s Nonprofit Support Program.
Board Update

Thea Montañez has been appointed to the board of directors by the members of the board. Thea is the founder and managing director of Montañez Consulting, LLC.

Yvette Meléndez has been re-elected chair of the board. Bonnie J. Malley was re-elected vice chair, and Robert B. Goldfarb was re-elected treasurer.

Staff Update

Elizabeth “Liz” Delton has joined the Foundation as grants database specialist. Liz previously served as associate director at YMCA Camp Mohawk, where she spent time on the opposite side of the grants table as financial development director, in conjunction with office management.

Virginia Li has been hired as strategy assistant. Virginia comes to us most recently from People’s United Bank, where she was employed as a Senior Customer Service Associate. She holds a B.A. in economics from the University of Connecticut and a Master of Science in human services from Albertus Magnus College.

Erika Frank has been promoted to program manager.

Coming this Spring... Metro Hartford Progress Points 2015!

The Hartford Foundation is working with eight regional partners to develop the second edition of Metro Hartford Progress Points, the community indicators report for Greater Hartford. The 10-page regional report provides a framework to reflect on the key challenges and opportunities for Greater Hartford.

Progress Points:

- Shares easily understandable objective data in one central report, on an annual basis.
- Fosters opportunities for civic engagement, collaborations and further analysis to effect change and/or celebrate successes.
- Catalyzes community leaders and institutions—including the Progress Points partners—to focus resources where they can accomplish the most good.

Partners:

- Capitol Region Council of Governments
- Capital Workforce Partners
- City of Hartford
- Hartford Foundation for Public Giving
- Hispanic Health Council
- Metro Hartford Alliance
- Trinity College Center for Urban and Global Studies
- United Way of Central and Northeastern Connecticut
- Urban League of Greater Hartford

Follow us on Twitter, Facebook and YouTube.
But, in contrast, the Hartford Foundation did not roar into existence. Nor did its wealth immediately double. In fine, conservative New England fashion, our steps were carefully planned. Our founders had the long term in mind. Eleven years after our founding—during the Great Depression that wiped out much of the wealth of the 1920s—enough income was generated to award our first grant. It was the 1940s before the endowment topped $100,000.

We have been able to serve this region over the past 90 years, due largely to the passion, commitment and generosity of our donors. What motivates our donors? The reasons are different for each donor. One of them, Peter Jung, a student at Trinity College, offers his story in this issue.

Every anniversary is a cause for celebration. Find out how you can celebrate with us with Words to Give By.