



25 Years of Inspiring Philanthropy  
**community foundation**  
of anne arundel county

# INSPIRED



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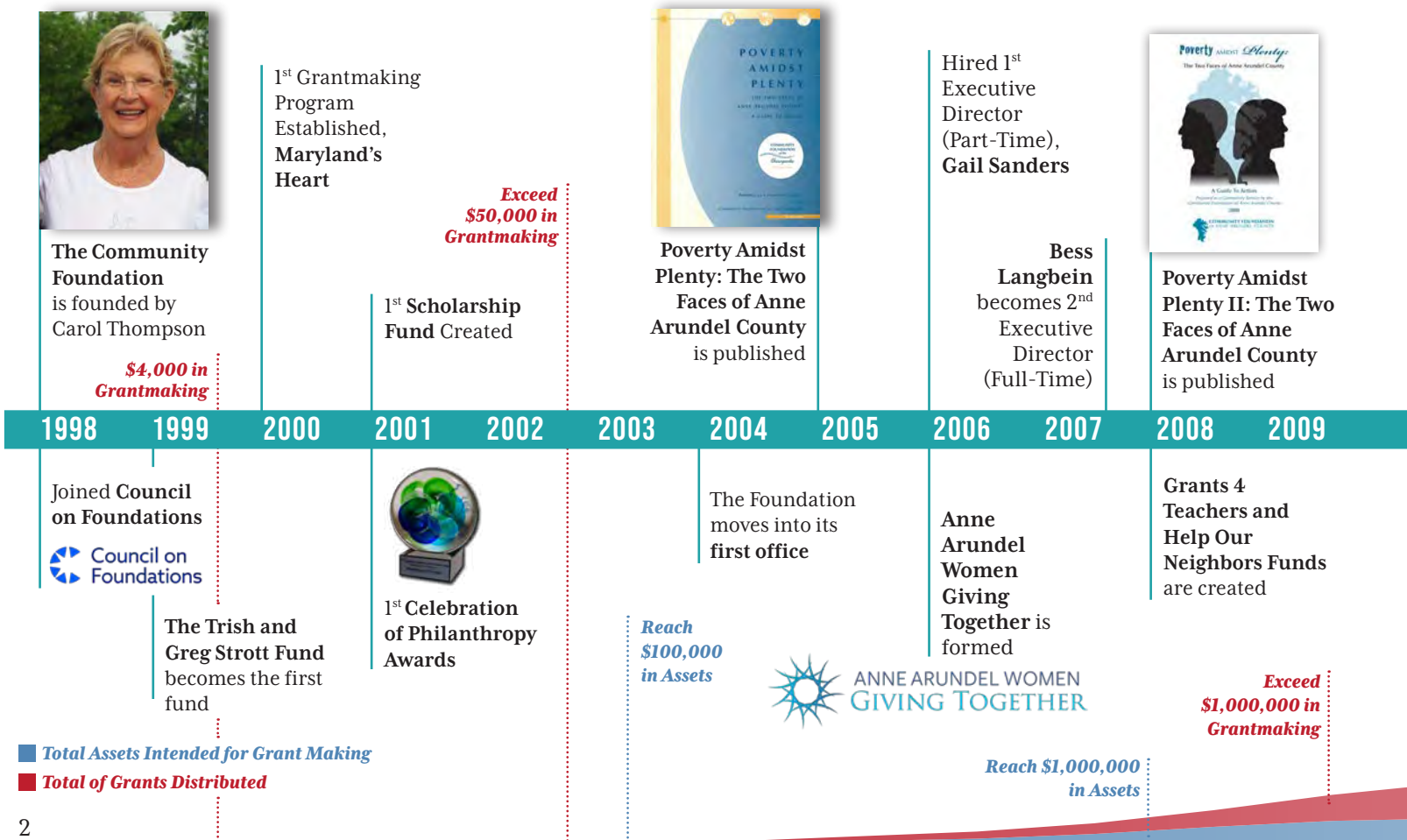
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## CFAAC 25-YEAR TIMELINE





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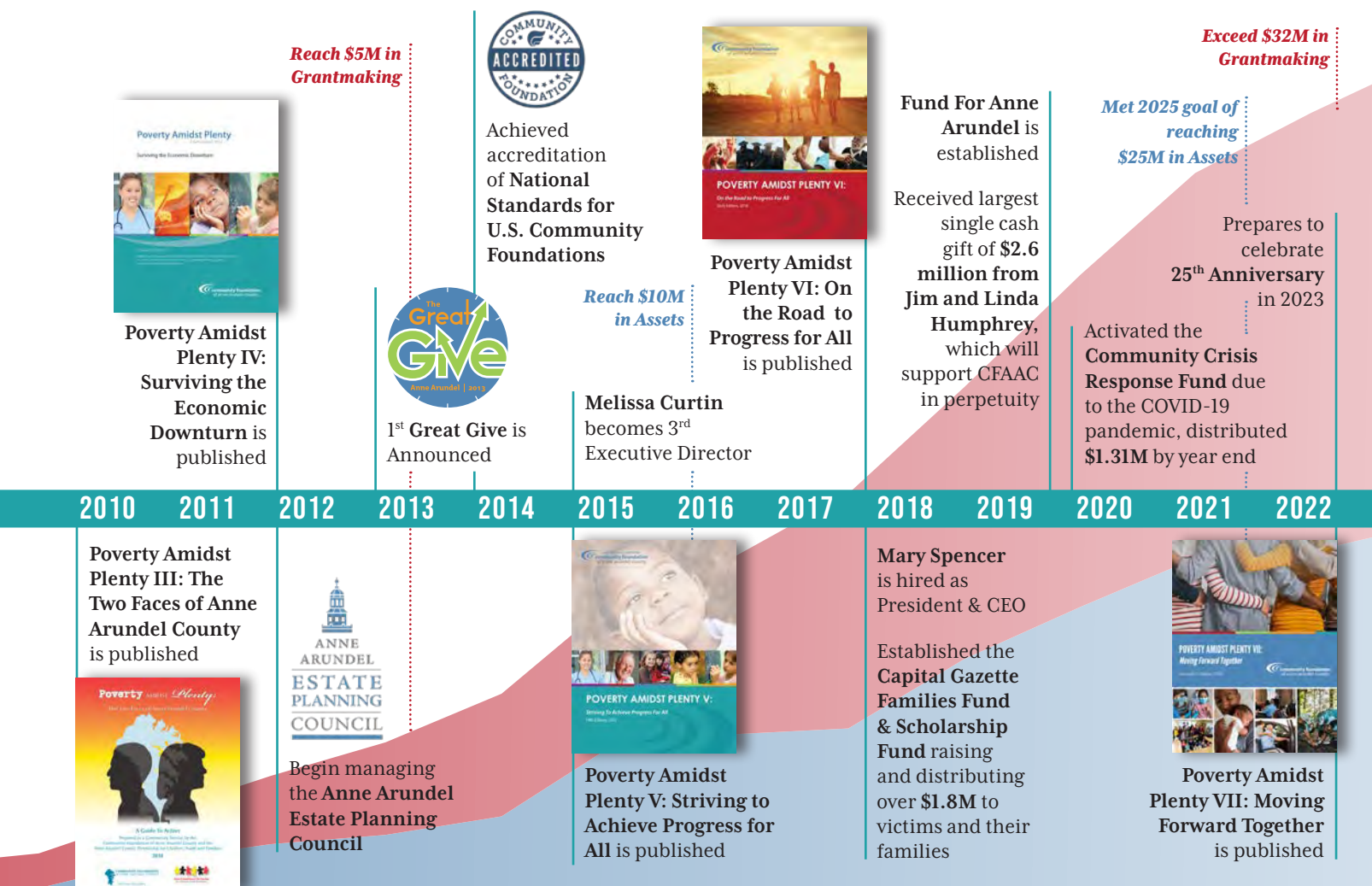
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# MESSAGE FROM CFAAC LEADERSHIP



**Jim Humphrey**  
CFAAC Board Chair

When we work together, we are able to make a tremendous impact in our community. The part the Community Foundation plays in helping to build better futures for our community members and our dedicated nonprofits is a source of pride and purpose for all of us. However, we could not do it without you. Thanks to you, in 2022, CFAAC ended the year with more than \$26 million in assets intended for grantmaking. We distributed 487 grants, including 10 scholarships, to more than 260 different organizations, totaling nearly \$4 million in funding. In addition, we established 12 new funds and 7 Legacy Fund commitments.

Throughout the year, donors continued to turn to the Community Foundation when incorporating their philanthropic goals into their estate plans. We now have confirmed more than \$75 million in assets that will come through future CFAAC Legacy Funds to support the important work of nonprofits.

This past year, CFAAC saw new milestones and changes, too. We reinforced our staff by adding a new Director of Development, Damika Baker-Wilson, in February 2022. And this year, we welcomed our new Director of Planned Giving, John Rodenhausen, a seasoned professional who is joining our team after 25 years at the Chesapeake Bay Foundation. We also welcomed back Kristen Krall, our former Grants and Scholarships Manager, who rejoined us on a part-time basis as our new Community Education Coordinator.



**Mary Spencer**  
CFAAC President & CEO

The Community Foundation welcomed four new Board of Trustee members—Daniel “Dan” Mathias, P.E.; Edward “Ed” Evans; Kate Belden Schoff; and Naeemah Staggs—we are excited and know that they bring with them enthusiasm and a diverse breadth of expertise. Saying goodbye to five dedicated retiring board members—Mary Grace Folwell, Carl Gutschick, John Magnolia, David Mitchell, and Paul Serini—is never easy. They remain an important part of CFAAC’s story and we are so grateful for their generous support, knowledge, and all that they’ve done for CFAAC.

CFAAC published the 2022 Community Needs Assessment Report: *Poverty Amidst Plenty VII: Moving Forward Together*, working with Dr. Pamela Brown, Executive Director of Anne Arundel County Partnership for Children, Youth, and Families. This report is paramount to understanding the issues and needs in the county that impact our economy and quality of life. To underline its importance and generate awareness, we invited the public to attend three needs assessment report presentations given by Dr. Brown, held at venues across the county. This year, Dr. Brown continues to hold talks online and county-wide. You can access the report on CFAAC’s website.

Throughout the year, we offered the community a wide range of webinars and in-person programs—19 in all! This included our annual Celebration of Philanthropy where we not only honored eight deserving community leaders, but also introduced our Professional Advisor Recognition Society, naming six inductees to its inaugural class. All the honorees represent our community on many levels—they are the people who drive transformational change in our county, serve as generous contributors who often work behind the scenes, and look beyond themselves to help make Anne Arundel County better for all.

This year, 2023, marks our 25th anniversary. To commemorate this anniversary, in 2022, we developed an ambitious, board-directed goal of achieving \$35 million in assets by 2025 that is aligned with our Strategic Plan. To achieve this goal, the CFAAC staff and board created a four-year, fundraising action plan, *Always Anne Arundel: Road Map to \$35 Million in Assets by 2025*. We continue to work toward these actionable goals in 2023. By leveraging our strengths—a dedicated board and staff, expert knowledge of our nonprofit and community needs, and generous donors—we are positioning ourselves to achieve great things and to navigate whatever the future brings.

As CFAAC celebrates throughout this 25th year, we are excited for the promising future that we all share, building upon CFAAC’s strong foundation to expand our impact, increase our reach, and make Anne Arundel County a great place to live, work, and play for all. Thank you for taking this journey with us.

**Mary Spencer**  
CFAAC President & CEO

**Jim Humphrey**  
2022-2023 CFAAC Board Chair

# 2023 BOARD OF TRUSTEES



**Jim Humphrey, Chair**  
Chairman & CEO  
*The Humphrey Companies*



**Larry Clark, Vice Chair**  
Community Volunteer



**Amy B. Tate, Secretary**  
Assistant General Counsel  
*Tate Automotive Companies*



**Katharine H. Caldwell, Asst. Secretary**  
Community Volunteer



**Karen M. Whaley, Treasurer**  
*Karen M. Whaley, CPA*



**Andrea Beegle, CFP®**  
Wealth Advisor  
*Compass Wealth Strategies, LLC*



**Dr. Coryse Brathwaite**  
Medical Director of Perinatal Operations  
*Anne Arundel Medical Center, Luminis Health*



**Lawrence B. Burrows**  
Independent Director and  
Chair of the Audit Committee  
*TriPointe Homes*



**Edward Evans**  
Director of DEI  
*Cordish Gaming Group*



**Anne Hamel**  
Community Trainer  
*Mental Health Association of Maryland*



**David Irving**  
Founder  
*CollegeReadyMath*



**Michael Lehr, Esq.**  
Principal  
*Sims & Campbell Estates and Trusts*



**Dan Mathias**  
Co-Founder & President  
*Absolute Fire Protection, Inc.*



**Vincent Moulden**  
Director Community Engagement  
Constituent Services  
*Anne Arundel County Executive's Office*



**Jennifer A. Pratt**  
Vice-President  
*Atapco Financial Services, Inc.*



**John A. Rosso, Jr.**  
Principal  
*Rosso Commercial Real Estate Services, LLC*



**Kate Belden Schoff**  
Senior Financial Advisor,  
Managing Director - Investments  
*Wells Fargo Advisors*



**Naeemah Staggs**  
Senior Training Specialist  
*School of Social Work, University of Maryland*



**Martha Van Woerkom**  
Community Volunteer



**Neil J. Weissman, MD, FACC, FASE**  
Chief Scientific Officer  
*MedStar Health*

**TRUSTEE EMERITI:** Becki Kurdle, Community Volunteer | Greg Strott, Community Volunteer


# CUMULATIVE GIVING

The Community Foundation of Anne Arundel County is very proud to have donors who support a variety of CFAAC priorities including the Community Leadership Fund, which strengthens our operational budget, and sponsorship in support of our Annual Celebration of Philanthropy Awards. This list includes cumulative gifts of \$1,000 or more made in 2022 to support CFAAC's operations as well as CFAAC funds that aid the organization's strategic grantmaking including: Arts and Culture Anne Arundel Fund, Community Crisis Response Fund, Environment Anne Arundel Fund, Fund for Anne Arundel, Grants 4 Teachers, Help Our Neighbors Fund, Strengthening Nonprofits Fund, and Women and Girls Fund. For the privacy of our donors, CFAAC does not list giving information about gifts made to individual funds.

## \$500,000+

Larry Clark   
Deerbrook Charitable Trust


## \$25,000 - \$49,999

Andrew and Leslie Price  
Jim  and Linda Humphrey  
Jim and Linda Humphrey Foundation  
ImpactAssets  
Cindy and Tim O'Neill  
William J. & Dorothy K. O'Neill  
Foundation  
Wells Fargo Advisors



## \$10,000 - \$24,999

James and Niecy Chambers  
Chaney Enterprises Bull Roast Fund  
Madelyn Schaefer  
Schaefer Family Fund


## \$7,500 - \$9,999

Tara Balfe Clifford  
Dr. Coryse Brathwaite  and  
Dr. Edward Zebovitz, D.D.S.  
Schwab Charitable  
Carol Bolton Sisco

## \$5,000 - \$7,499

Kathy and Chauncey Brooks III  
Larry Burrows  and Dawne  
Widener-Burrows  
Larry and Dawne Burrows Fund  
Rosalind  and Paul Calvin  
Jane Campbell-Chambliss and  
Peter Chambliss  
Campbell Property Management  
Ralph and Carlotta Crosby  
Raymond and Barbara Crosby  
Crosby Foundation  
James and Sylvia Earl  
The Helena Foundation





## \$5,000 - \$7,499, CONTINUED

Barry Gossett  
Barry and Mary Gossett  
Foundation Fund  
Carl  and Anita Gutschick  
Gutschick Family Foundation  
Sabra Ladd  
Luminis Health Anne Arundel  
Medical Center  
Beverly and Stephen Marcus  
Beverly and Stephen Marcus  
Foundation  
OBXtek, Inc.  
Bruce Potter  
Kincey and Bruce Potter  
Environmental Fund  
The Honorable Beverly Sherman Nash  
Vanguard Charitable  
Greg and Susan Walker  
Greg and Susan Walker  
Family Foundation




## \$2,500 - \$4,999

Anonymous  
Benevity Community Impact Fund  
Brown Advisory  
Patty Brown and Joe Gill  
Patty Brown and Joe Gill Giving Fund  
Katharine H.  and Harry Caldwell  
Fidelity Charitable Gift Fund  
Mary Grace Folwell  and Jeff Riedle  
Edward G. Freitag and Martha Haley  
Family Foundation  
Warren and Anne Hamel   
Hamel Family Fund  
Daniel  and Tanya Mathias  
Mathias Family Foundation  
David  and Kim Mitchell  
Morgan Stanley  
Jennifer Pratt   
Raymond James Charitable

## \$2,500 - \$4,999, CONTINUED

John  and Priscilla Rosso  
Amy Beth Tate   
Bill Thompson  
United Way of Central Maryland  
Martha Van Woerkom   
Karen M. Whaley   
Robert and Ann Whitcomb  
Erin and Jonathan Williams  
Williams Family Fund

## \$1,000 - \$2,499

Steven Ames  
Anne Arundel Community College  
Foundation  
Patricia P. Baum  
Andrea  and Chris Beegle  
Beegle Family Fund  
Beer Family Fund  
Bud Billups  
Boatyard Bar & Grill  
Ken Code and Cathy Dea Code  
Dea Code Family Foundation  
Council Baradel  
Ronald E. Council  
Council Family Foundation  
Carol and David Cronin  
John and Jill DePaola  
Bo DePaola Family Foundation Fund,  
Bo's Effort  
Frederick Galloway  
Collot Guerard  
David Hankey  
David and Jan Hoffberger  
Tom and Prue Hoppin  
David  and Tove Irving  
Ron and Nan Jarashow  
Jon and Kathy Korin  
Katie Leavy  
Michael  and M. Katherine Lehr



## \$1,000 - \$2,499, CONTINUED

Richard Lerner  
Arthur Little and Barbara Tymkiw  
Mason Investment Services  
Jim and Nancy Nolan  
Joyce Olin and Christopher Nelson  
Optum Health  
Mike and Sue Pitchford  
Colleen and Lester Prosser  
Colleen Prosser Living Trust  
Shore United Bank  
John B. and Mary E. Slidell  
Mary 🧑 and Dale Spencer  
Mary and Dale Spencer Charitable Fund  
Raymond Streib  
Trish and Greg 🧑 Strott  
Trish and Greg Strott Fund  
Peter and Daphne Summers  
Sunshine Fund  
TIAA  
The U.S. Charitable Trust  
Dr. Neil Weissman 🧑  
Joseph Workman

2022 or 2023 CFAAC Board Member 🧑

2022 or 2023 CFAAC Staff Member 🧑

## 2023 CFAAC STAFF



**Mary Spencer**  
President and CEO



**Kathy Luthcke, CPA, CGMA**  
Director of Finance & Operations



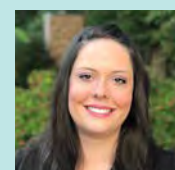
**Damika Baker-Wilson, CFRE**  
Director of Development



**John Rodenhausen**  
Director of Gift Planning



**Rosalind Calvin**  
Grants & Scholarships Manager



**Ashley Robison St. Clair**  
Marketing & Communications Coordinator



**Renee Houston Zemanski**  
Communications Specialist



**Kelli Williams**  
Philanthropic Services Coordinator



**Kristen Krall**  
Community Education Coordinator

# ANNOUNCING: ALWAYS ANNE ARUNDEL

Community foundations like the Community Foundation of Anne Arundel County, are available for local emergencies, can discover pockets of need within a community, provide high-quality philanthropic services to donors, offer expertise based on their deep understanding of local needs, and organize informative programs to strengthen nonprofits and educate the community. CFAAC is uniquely positioned to connect philanthropic dollars with local nonprofits that are working directly with communities and residents in need.

In 2022, members of the CFAAC staff and Fund Development Committee, carefully worked with CFAAC's Strategic Plan to draft a Road Map to \$35M in assets by 2025. As a result, a detailed, four-year, fundraising plan was outlined. The plan includes increasing: Immediate Impact Funding, Endowment for CFAAC, Assets for Discretionary Grantmaking Funds, and Endowment Commitments.



## WHY NOW?

In every great community, there are times when vision, leadership, and generosity come together to transform the future. This is Anne Arundel County's time. And CFAAC is leading the way.

CFAAC celebrates its 25th anniversary in 2023. This is CFAAC's defining moment; it is the time for us to not only look back at our achievements, but also move forward to new levels of success.

### How can you help?

- Open a Donor Advised or Corporate Advised Fund.
- Continue to grow your existing Donor Advised Fund or Corporate Advised Fund by adding gifts that can be put to work immediately.
- Support CFAAC's future by contributing to our Endowment.
- Leave a legacy by creating an Endowed Fund for causes that you care about or by making a planned gift to CFAAC.
- Pool your resources together with other donors by giving to one of CFAAC's Discretionary Funds.
- Add new intentions to your existing Donor Advised Fund to convert it during your lifetime to an Endowed Fund.

## ROAD MAP TO \$35M IN ASSETS BY 2025

**INCREASE  
IMMEDIATE IMPACT  
FUNDING  
\$15M - \$20M**

**INCREASE  
ENDOWMENT  
FOR CFAAC  
\$1M - \$2.5M**

**INCREASE ASSETS FOR  
DISCRETIONARY  
GRANTMAKING FUNDS  
\$2M - \$5M**

**INCREASE  
ENDOWMENT  
COMMITMENTS  
\$1M - \$2.5M**

*Road Map Goals include outright and planned gift pledges*

*Always Anne Arundel*



## ALWAYS GROWING BY...

- Opening 125 new funds including new legacy commitments
- Leveraging partnership with Anne Arundel Estate Planning Council
  - Launched the Professional Advisor Recognition Society in 2022
- Strengthening our Charitable Partners Program



## ALWAYS IMPACTFUL BY...

- Grounding our community impact work in the 2022 Community Needs Assessment findings
- Increasing accessibility to all CFAAC events, programs, and resources
- Aligning our speaker series programs with community needs



## ALWAYS SUPPORTING BY...

- Exploring new or revised Fields of Interest Funds to align with our 2022 Community Needs Assessment
- Continuing the grantmaking cycle for the Fund for Anne Arundel to strengthen and encourage innovative partnerships between large and small organizations through:
  - Partnership and capacity building
  - Mentoring for smaller organizations to grow capacity
  - Lifting up nonprofits in our community



## ALWAYS SHARING BY...

- Honoring CFAAC's history within the context of the larger world
- Communicating forward-thinking messages focused on future aspirations



## ALWAYS CELEBRATING BY...

- Visualizing CFAAC's reality at its 50th anniversary
- Celebrating in the community through:
  - Celebration of Philanthropy Awards
  - Educational Programming and Events
  - Community Awareness Events
  - Legacy Fundholder Events Gatherings
  - Planned Giving Informational Events
  - Leadership Donor Celebrations



## ALWAYS LEADING BY...

- Promoting CFAAC, our events, and initiatives
- Continuing to generate awareness of CFAAC to the community
- Remaining the board of choice, recruiting new board members to steward CFAAC's future



# 2022 YEAR IN REVIEW



Grew to **\$26.8 Million** in *Total Assets under management* intended for grantmaking



Hosted the **22nd Annual Celebration of Philanthropy Awards Luncheon**



Maintained Accreditation through *The National Standards for U.S. Community Foundations*, which ensures organizational accountability and commitment to legal compliance, philanthropic best practices, and operational excellence.



Supported 8 *Anne Arundel Estate Planning Council* Events



Hosted 15 *Community Impact Speaker Series* events



Published *Poverty Amidst Plenty VII: Moving Forward Together*, community needs assessment report



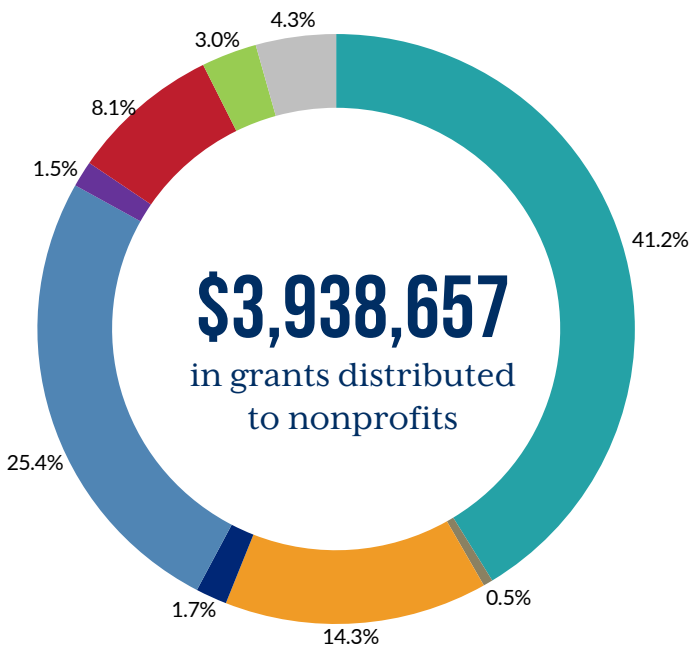
Opened **12 New Donor Advised, Corporate Advised, Agency, and Legacy Funds**



Provided **\$8,625 Endow Maryland Tax Credits** creating \$34,500 in new endowed assets through the program



**2022 Total Endowed Assets** under management: **\$6,942,173**



## 487 GRANTS AWARDED IN 2022

### FUNDS & SCHOLARSHIPS

- 365 Donor Advised Fund Grants, \$3,127,273
- 15 Designated & Program Grants, \$36,685
- 10 Scholarships, \$64,500
- 7 Nonprofit Agency Fund Grants, \$23,355

### OTHER GRANTS

- 11 Anne Arundel Women Giving Together Grants, \$159,265
- 11 Anne Arundel County Fund Grants, \$68,772
- 33 Field of Interest Fund Grants, \$184,000

### DISCRETIONARY GRANTS

- 18 Community Crisis Response Fund Grants, \$87,541
- 10 Grants 4 Teachers Grants, \$4,951
- 7 Fund for Anne Arundel Grants, \$182,315

## GRANTS BY INTEREST TYPE

Education	\$ 1,624,608	Arts & Culture	\$ 66,925	Capacity Building	\$ 320,450
Other	\$ 20,500	Human Services	\$ 999,442	Environment	\$ 118,317
Health & Wellness	\$ 561,315	Scholarship	\$ 56,100	Faith-Based	\$ 171,000



# 2022 COMMUNITY NEEDS ASSESSMENT REPORT

## POVERTY AMIDST PLENTY VII: MOVING FORWARD TOGETHER

*“The needs assessment is important because in so many ways it serves as the preamble for a playbook: A playbook for creating positive change in our community. If we can see the issues, we can find the solutions.”*

—CFAAC Board Member and Fundholder **Andrea Beegle**

The Community Association of Anne Arundel County strives to help make Anne Arundel County a wonderful place to live for all. We know that the love of our beautiful county is shared by many but also realize there are pockets of need throughout. Therefore, every three years, CFAAC publishes a needs assessment report that examines the gap that exists between the current state of our county and the desired state of our county. The needs assessment is a data-rich report intended to increase knowledge and awareness about persistent local trends and needs in Anne Arundel County.

In the fall of 2022, the report’s author, Pamela Brown, Ph.D., the Executive Director of the Anne Arundel County Partnership for Children, Youth and Families, hosted needs assessment presentations around the county including three public sessions at Maryland Hall for the Creative Arts, the Chesapeake Arts Center, and Anne Arundel Community College. The presentations were well attended and Pamela continues to host additional talks, as needed.

The 2022 Anne Arundel County Community Needs Assessment, *Poverty Amidst Plenty VII*, contains collective quantitative and qualitative data from a variety of local, state and national sources, focus groups, and more. The focus groups were comprised of diverse voices throughout the county including residents, advocates, and health care personnel and providers, representing a total of 168 participants. Their comments are threaded throughout the report. The data was reviewed until dominant themes emerged, which became the subtext of the report.

By tracking the key measures of community well-being, CFAAC can identify priority needs and possibly identify root causes that contribute to those needs. Then nonprofits, community advocates, individual philanthropists, volunteers, business leaders, elected officials, policy makers, government agencies, foundations, professional advisors, and the general population can use this report to develop and prioritize strategies and implement plans. It allows us to work together and develop a common vision for Anne Arundel County—a vision that can be the catalyst in the formula to determine real community solutions. To support these efforts, CFAAC plays an important role by building permanent philanthropic assets that are necessary to sustain our local nonprofits and the wonderful work they do.



Mary Grace Folwell, Anne Hamel, Martha Van Woerkom, Amy Tate, and Mary Spencer at the Anne Arundel Community College presentation.



Amy Tate, Kate Caldwell, Martha Van Woerkom, Andrea Beegle, Mary Spencer, Dr. Brown, and Larry Burrows at the Maryland Hall presentation.



Larry Clark, Kathy Luthcke, Rosemary Calderalo, Damika Baker-Wilson, and Rosalind Calvin at the Chesapeake Arts Center presentation.



Dr. Pamela Brown presenting at Maryland Hall.



SCAN OR VISIT  
[www.cfaac.org/needs-assessment.html](http://www.cfaac.org/needs-assessment.html)  
 TO DOWNLOAD A COPY



# CONNECTION. IT'S A WORD THAT HAS GREAT MEANING TO THE BURROWS.

“We have strong bonds with our families and we remain connected to them,” said Dawne. “We also enjoy being connected to our respective colleges by funding scholarships, and now are pleased to be more connected with our local community through CFAAC.”

Larry added, “We’ve been involved in philanthropy for a while, but when the pandemic hit, we wanted to be more intentional in our local giving efforts.”

Fortuitously, they ran into an acquaintance who told them about the Community Foundation; they both wanted to become involved. They dove right in: Larry became a CFAAC Board member. Dawne joined CFAAC’s giving circle, Anne Arundel Women Giving Together.

“We wanted to be more engaged locally and we had confidence that CFAAC could help us make better connections,” said Larry, who with Dawne opened a Donor Advised Fund at CFAAC in 2022. After opening the fund, the Burrows sat down with CFAAC staff and talked about their interests. They had researched local charities, but were pleased when they discovered even more nonprofits that could use their help through their conversations with the Community Foundation staff, who have a deep understanding of local nonprofits.

“We have great confidence and trust in these nonprofits because we know that CFAAC has vetted them, and because of that, have confidence that the organizations are making an important impact in our community,” said Larry.

## “GIVING GENERATES BOTH LIGHT AND HOPE.” —LARRY

Larry and Dawne take full advantage of giving through time and funds. Having been retired for over 10 years— Larry from an executive position with Weyerhaeuser, and Dawne, who founded and ran her own marketing research firm—they are not only involved with CFAAC, but also with other organizations. Larry serves as a board member with TRI Pointe Homes, Inc., and served on the Chesapeake Multicultural Resource Center board for more than 10 years. Dawne has served as a board member of the Spina Bifida Association for the past two years, and previously on the Annapolis Symphony Orchestra board. Both also currently serve on their respective college advisory boards; Larry with Rutgers and Dawne with the

University of Florida. In terms of contributing, Larry often remembers what his mentor told him long ago: “He said, ‘do well and do good.’ That still resonates with me.”

## “WITH THE COMMUNITY FOUNDATION IT’S ABOUT RELATIONSHIP PHILANTHROPY RATHER THAN TRANSACTIONAL PHILANTHROPY; WITH CFAAC YOU ALSO GET ENGAGEMENT.” —LARRY

Dawne agreed, “Everyone at CFAAC has been super supportive, very responsive, and extremely helpful. The Community Foundation is a great resource and once you open your fund, you should take advantage of all of the services offered to you; that’s been really helpful to us. And the programs they sponsor—helping to support leadership and nonprofits—are outstanding.”

Larry added, “The Community Foundation makes your decision-making easier. They have a great understanding of the community’s needs if you are looking to make an impact locally.”





# 2022 GRANTS & SCHOLARSHIPS PROGRAM VOLUNTEERS

Patti Baum  
 Andrea Beegle  
 Kathy Brooks  
 Patty Brown  
 Larry Burrows  
 Larry Clark  
 Jenny Davis Forrest  
 Ed Evans  
 Marguerite Gibbons  
 Anne Hamel  
 Jan Hoffberger  
 David Irving  
 Mike Lehr  
 John Magnolia  
 Vincent Moulden  
 Cindy O'Neill

Lisa Pellicani  
 Paul Pellicani  
 Renee Plumb  
 Bruce Potter  
 Laura Marie Robinson  
 Kate Schoff  
 Abby Sprinkel  
 Naemah Staggs  
 Michelle Szczepaniak  
 Amy Tate  
 Nancy Turner  
 Phil Turner  
 Martha Van Woerkom  
 Neil Weissman  
 Karen Whaley  
 Crystal Williams  
 Chuck Yocum



## 2022 CFAAC SCHOLARSHIP RECIPIENTS

### LCPL. ERIC HERZBERG, USMC AND LCPL. WILLIAM TAYLOR WILD, IV, USMC SCHOLARSHIP FUND

The following recipients each received \$10,000 scholarships:

**Arusa Malik**, South River High School, plans to study political science and international diplomacy at John Hopkins University.

**Lucy Nathan**, Broadneck High School, plans to study occupational therapy at Misericordia University.

In 2022, thanks to a generous contribution from an anonymous donor, the fund was able to award two additional \$5,000 scholarships to the following students:

**Adah Harding**, Arundel High School, plans to study biomedical engineering at the University of Maryland Baltimore College.

**Simon Sulonen**, Northeast High School, plans to study physics at The Citadel.

### THE OFFICER GRANT TURNER MEMORIAL SCHOLARSHIP FUND

Each recipient received a \$1,700 scholarship:

**Lauren Recktenwald**, Arundel High School, plans to study sports performance: health and fitness at Webber International University.

**Erin Tebbe**, South River High School, plans to study kinesiology at the University of Maryland-College Park.

**LEARN MORE AT: [CFAAC.ORG/SCHOLARSHIPS](https://cfaac.org/scholarships)**



# 2022 BOARD COMMITTEE MEMBERS

## EXECUTIVE COMMITTEE

Jim Humphrey, *Chair*  
 Larry Clark, *Vice Chair*  
 Amy Tate, *Secretary*  
 Katharine H. Caldwell, *Assistant Secretary*  
 Karen Whaley, *Treasurer*  
 Mary Grace Folwell, *Immediate Past Chair*  
 John Magnolia

## ASSET MANAGEMENT

Larry Clark, *Chair*  
 Martha Blaxall, *Community Volunteer*  
 Stephen Holt, *Premier Planning Group*  
 Jim Humphrey, *CFAAC Board Chair*  
 Brad Long, *Raymond James Financial Services Advisors, Inc.*  
 Greg Strott, *Trustee Emeritus*

## GOVERNANCE & NOMINATING

Anne Hamel, *Chair*  
 Larry Burrows  
 Mike Lehr  
 David Mitchell  
 Vincent Moulden  
 Martha Van Woerkom

## BUDGET & FINANCE

Karen Whaley, *Chair*  
 Carl Gutschick  
 Jim Humphrey  
 John Rosso  
 Neil Weissman

## FUND DEVELOPMENT & COMMUNICATIONS

Katharine H. Caldwell, *Chair*  
 Andrea Beegle  
 Coryse Brathwaite  
 Kathy Brooks  
 Larry Burrows  
 Larry Clark  
 David Irving  
 John Magnolia  
 Vincent Moulden  
 Cindy O'Neill  
 Jennifer Pratt  
 Paul Serini  
 Amy Tate

## AUDIT COMMITTEE

David Mitchell, *Chair*  
 Larry Clark  
 Jim Humphrey

## CFAAC FUNDS

Opening a fund at CFAAC is the first step in creating a legacy to benefit causes that matter to you. We thank you for choosing us as your philanthropic partner. As financial stewards dedicated to helping you make the most of your giving, we are honored to work with nearly 200 individuals, families, companies and nonprofits who have established funds at the Community Foundation of Anne Arundel County.

Your generosity is making a powerful impact to build up communities where everyone has an opportunity to thrive. In 2022, CFAAC welcomed the following funds; each was established to support charitable causes that align with the donor's philanthropic goals and financial strategies.

Anonymous Legacy Fund

Katherine Barnett AAWGT Lifetime Membership Fund

Lawrence Burrows and Dawne Widener-Burrows  
Charitable Fund

The Deerbrook Fund

MG and BR Gosnell Fund

The David and Tove Irving Family Fund

Trudy McFall Fund

OBXtek Charitable Foundation

Lily Openshaw AAWGT Lifetime Membership Fund

Betsy Brown Ruzzi Education Fund

Ellen Shiery AAWGT Lifetime Membership Fund

Trish Strott AAWGT Lifetime Membership Fund

## ANNE ARUNDEL COUNTY FUNDS

Anne Arundel County agencies and departments deliver critical services that improve the quality of life for all residents. CFAAC's Anne Arundel County Funds allow donors to provide direct support to county agencies, departments, programs, and projects. These funds ensure that these important agencies and services continue to aid our community.

Anne Arundel County Animal Control

Anne Arundel County Department  
of Aging

Anne Arundel County Department  
of Health

Anne Arundel County Department  
of Social Services

Anne Arundel County Fire Department

Anne Arundel County General Use

Anne Arundel County Partnership for  
Children, Youth & Families

Anne Arundel County Police  
Department

Anne Arundel County Recreation &  
Parks Department

Anne Arundel County Sheriff's Fund

## CORPORATE ADVISED FUNDS

Companies that encourage community involvement distinguish themselves from their competitors and see many benefits, including loyal customers and happy employees. Corporate Advised Funds enable companies to launch and grow a philanthropy program that aligns strategically with their financial and business goals, maximize tax benefits, and engage its employees. CFAAC works with corporations to establish Corporate Advised Funds, eliminating administrative burden so companies can focus on business while also allowing owners, managers, and employees to have a voice in philanthropic decision-making.

Baum Jackson Investment Group  
Charitable Foundation

Crosby Foundation

Gable Signs Foundation for a  
Brighter Future

Greenberg Gibbons/Reliable  
Contracting Foundation Fund

Howard Bank Fund

Insurance Force Foundation

Maryland Mortgage Bankers and  
Brokers Association (MMBBA) Fund

Maryland Realtors Charitable Fund

OBXtek Charitable Foundation

## SCHOLARSHIP FUNDS

Scholarship Funds allow the donor to help deserving students pursue their academic goals. Donors, working with CFAAC, can determine scholarship requirements including field of study, need, and education level such as high school or college. Funds can be named in memory of a loved one or to honor a family member.

William Bunn Memorial  
Scholarship Fund\*

Capital Gazette Memorial  
Scholarship Fund

Lance Corporal Eric Herzberg, USMC  
and Lance Corporal William Taylor  
Wild, IV, USMC Scholarship Fund

Officer Grant Turner Memorial  
Scholarship Fund



## DESIGNATED PURPOSE FUNDS

Designated Purpose Funds allow donors to name one or more specific organizations or agencies to benefit annually from the fund. Each gift is invested for long-term growth to provide perpetual support to the organization(s). Designated Purpose Funds are good choices for donors who want to support a charity or charities for multiple years so that distributions can be spread out over time to help with the charity's planning. The fund can be named after a designated organization, in honor of a loved one, or another name that highlights the fund's purpose.

Anonymous Fund (1)	Anna E. Greenberg Leadership Fund	Sylvia Meisenberg Shakespeare Education Fund
Anne Arundel Estate Planning Council Fund (AAEPC)	Healthy Anne Arundel	Perinatal Loss Fund
Beer Family Fund	In Your Honor Fund	John Starr Memorial Musician's Fund
Babe & Dick Chaney Memorial Endowment Fund	Langbein Family Endowment Fund	Sullivan Family Charitable Fund
Davis Family Designated Fund	Marcus Endowment Fund for Arundel Lodge	The Sunshine Fund
Karen Feldman Endowment Fund for Seeds 4 Success	Sylvia Meisenberg Adult Literacy Program at Arundel House of Hope	Carol Thompson Fund
		Tommy Yeager Endowment Fund

## DISCRETIONARY GRANTMAKING FUNDS

Discretionary grantmaking funds are unrestricted funds that provide great flexibility to the Community Foundation so it can respond to emerging or immediate needs of the community. The grants are made at the discretion of CFAAC and grant committees so they can use the funding to address important community concerns that may evolve over time. These funds may be used in times of crisis.

Community Crisis Response Fund	Grants 4 Teachers Fund	Strengthening Nonprofits Fund
Fund for Anne Arundel	Help Our Neighbors Fund	

## FIELD OF INTEREST FUNDS

Field of Interest Funds allow donors to identify and support a broad charitable purpose or category of interest, such as the arts, education, human services, or a geographic area in the county. These funds are broad in scope yet targeted to meet the needs of the community. CFAAC's grant review committees use their expertise to identify, evaluate, and award grants to organizations whose request or proposal most closely aligns with the purpose of the fund.

Arts and Culture Anne Arundel Fund	Chaney Enterprises Bull Roast Fund	South County Fund
Babe and Dick Chaney Memorial Fund	Environment Anne Arundel	Women and Girls Fund

## GIVING CIRCLE FUNDS

Giving Circles encourage members to participate in philanthropy through grantmaking, education, advocacy, and community-based activities. Anne Arundel Women Giving Together, a component fund of CFAAC, is made up of individuals who pool their donations and decide together what initiatives or causes to support. Giving Circles enable people to increase their impact, knowledge, and connectivity with the community.

Anne Arundel Women Giving Together (AAWGT) Giving Circle Grant Fund	Maryann G. Gosnell AAWGT Lifetime Membership Fund	AAWGT Lifetime Membership Fund
AAWGT Endowment Fund*	Lily Openshaw AAWGT Lifetime Membership Fund	Endowment Fund (10th Anniversary)
Katherine Barnett AAWGT Lifetime Membership Fund	Julie B. Schuelke AAWGT Lifetime Membership Fund	Tara Balfe Clifford
Helaine Frances Betnun AAWGT Lifetime Membership Fund	Ellen D. Shiery AAWGT Lifetime Member Fund	Bronwyn Belling
Lynne Davidson AAWGT Lifetime Membership Fund	Trish Strott AAWGT Lifetime Membership Fund	Martha Blaxall
Linda Eggbeer AAWGT Lifetime Membership Fund		Bev Marcus
		Angela Peterman Ponatoski
		Judy Templeton

\*Includes a Legacy Gift Component

The CFAAC Funds List does not include administrative funds.

# CFAAC FUNDS, CONTINUED

## DONOR ADVISED FUNDS

Donor Advised Funds (DAF) provide a customized approach to philanthropic giving. With a minimum gift of \$10,000, donors can establish a fund in their name or a name that highlights the fund's purpose. Donors can contribute diverse assets including cash, appreciated stock, real estate, and/or other assets, and receive the maximum allowable tax advantages. Opening or contributing to an existing DAF allows donors to make a charitable contribution at any time and receive an immediate tax deduction.

Anonymous Fund (1)  
Batzold Chien Charitable Fund  
Beauty for Ashes\*  
Beegle Family Fund  
Big J's Fund  
Blaxall Fund for Economic Growth  
Blessings Fund  
Bradshaw Family Fund\*  
Brooks Family Fund  
Patty Brown and Joe Gill Giving Fund\*  
Lawrence Burrows and Dawne  
Widener-Burrows Charitable Fund  
Carbaugh Family Foundation  
Margaret Sander Chaires Foundation  
Babe and Dick Chaney Memorial Fund  
Frank and Susan Chaney Foundation  
Chaney Impact Fund  
L.C. Cohen Fund  
Council Family Foundation  
Cron dall Fund  
Danny's Fund  
Louis A. D'Camera Memorial Fund  
Deems Digital Foundation\*  
The Deerbrook Fund  
Bo DePaola Family Foundation Fund,  
Bo's Effort  
Agnes Dixon Fund  
Coach John Dockstader Fund  
The EWE Spirit Fund  
FEDE Fund  
Frank's Fund  
Franyo Foundation Fund

Galen's Gift  
MG and BR Gosnell Fund  
Barry and Mary Gossett Foundation  
Gutschick Family Foundation\*  
Haller Family Foundation  
Hamel Family Fund  
HannaPolis Fund  
Jim and Linda Humphrey Foundation  
Carroll H. Hynson Foundation  
Invictus Fund  
The David and Tove Irving Family Fund  
Julia A. King & Raymond J.  
Cannetti Fund  
Andrew Kiracofe Memorial Fund  
Kurdle Family Fund  
Dr. Michael J. Kurtz Foundation  
Dr. Michael J. Kurtz Legacy Fund  
Dick and Sabra Ladd Charitable Fund  
Neal Lehner Family Fund  
Lewis Family Fund  
Lowery Homes Fund  
Magnolia Family Foundation  
Beverly and Stephen Marcus  
Foundation  
Marston Family Foundation  
Mathias Family Foundation  
Trudy McFall Fund  
Jessica and Bruce Morgenstern Local  
Community Impact Fund\*  
Peterman Ponatoski Family Foundation  
Pomfret Family Charitable Foundation  
Kincey and Bruce Potter  
Environmental Fund

Mark and Lynne Powell Family  
Foundation  
Colleen and Lester Prosser Fund  
RK Family Fund  
Rosso Family Fund  
Betsy Brown Ruzzi Education Fund  
Lester M. and Lynda B. Salamon  
Charitable Fund  
Schaefer Family Fund  
Laurie Sharp Memorial Fund  
John B. and Mary E. Slidell Family  
Charitable Fund  
Mary and Dale Spencer Charitable Fund  
Trish and Greg Strott Fund\*  
Victor A. Sulin Charitable Fund  
Sonja Swygert Family Fund  
Creston G. and Betty Jane Tate Fund  
Thornton Family Fund  
Three Cones Fund  
Ronald and Jeanne Uhl Family Donor  
Advised Fund  
Walk the Walk Community Fund  
Greg & Susan Walker Family Foundation  
Neil J. Weissman Fund  
Williams Family Fund  
The Wisteria Fund  
Zoe Quinn Francis Fund

\*Includes a Legacy Gift Component



From Donor Advised Funds to Field of Interest Funds and more, starting a charitable fund at CFAAC can make philanthropic giving impactful, easy, and meaningful.

To get started, contact us at 410.280.1102 or visit [cfaac.org/FundTypes](http://cfaac.org/FundTypes)

## NONPROFIT AGENCY ENDOWMENT FUNDS

Endowments have many benefits for both donors and charitable organizations—they can help create a lasting legacy while supporting charitable causes or community needs as well as provide an assurance that the programs or causes donors care about will be supported in perpetuity. An Agency Endowment Fund at CFAAC helps ensure donors that they are contributing to a stable, growing organization, and to a purpose that will endure forever.

Annapolis Maritime Museum  
Endowment Fund

Anne Arundel Conflict Resolution  
Center Endowment Fund

Anne Arundel County Public Library  
Foundation Endowment Fund

Boy Scouts of Anne Arundel County  
Center of Help Endowment Fund\*

Charting Careers Endowment Fund

Chesapeake Bay Foundation Fund  
Chrysalis House Endowment Fund

Colonial Players Roland E. Riley  
Endowment for the Arts

Community Leadership Fund  
for CFAAC

Londontowne Symphony Orchestra  
Endowment Fund

Opportunity Builders Inc.

Partners In Care Maryland  
Endowment Fund

Pregnancy Clinic Endowment Fund

Scenic Rivers Land Trust  
Stewardship Reserve

Teach 4 Anne Arundel Fund

## LEGACY SOCIETY

There are many ways to leave a legacy and impact future generations at the Community Foundation of Anne Arundel County. Planned gifts, when realized, can range from establishing a new fund or giving direct gifts to nonprofits to supporting CFAAC's work. CFAAC can also arrange for a charitable gift annuity to benefit loved ones, providing for their lifetime income while leaving a gift to charity after their lifetime.

CFAAC works with your professional advisors to ensure that you realize your philanthropic goals. We can answer your questions, assist you in identifying giving options, and support your goals to leave a lasting impact.

Members of CFAAC's Legacy Society understand that CFAAC is well-positioned to serve as their stewards to impact and improve our community now and in the future. Partner with the Community Foundation and discover how you can create a legacy and contribute to the vision of the world that you carry in your heart.

Anonymous Donors (7)

Cornelius G. Aben, Jr.

Steven R. Ames

Helaine Frances Betnun

Patricia Brown and Joe Gill

Katharine H. Caldwell

Jane Campbell-Chambliss and  
Peter Chambliss

Mary Middleton Calhoun Carbaugh  
Charitable Lead Trust

Prudence Clendenning

Linda C. Cohen

Michaele Cohen

Billie and Erma Collins

James M. and Susan D. Cox

Louis and Charlotte D'Camera

Gene Deems

Louise E. DeJesu

Jib and Katherine Edwards

Robert and Kim Elling

Brian Guarino

Carl and Anita Gutschick

Barbara Hoffstein

Marsha S. Jackson

Julia A. King and Raymond J. Cannetti

Tatiana and Richard Klein

John and Jan Magnolia

Trudy McFall

Bruce and Jessica Morgenstern

Eugene Paul Nepa Trust

Cindy and Tim O'Neill

Rita E. Ormasa

Bruce Potter

Mary S. Powell

Russell K. and Alexandra C. Robinson

Madelyn Schaefer

Patricia E. Schellman

John and Mary Slidell

Colleen Stauffer

Greg and Trish Strott

Melanie M. and Michael D. Teems

William Thompson

The Honorable Cathleen M. Vitale and  
Mark Muckelbauer

Catherine Weber

Neil J. Weissman, MD

Karen M. Whaley

**\*Includes a Legacy Gift Component**

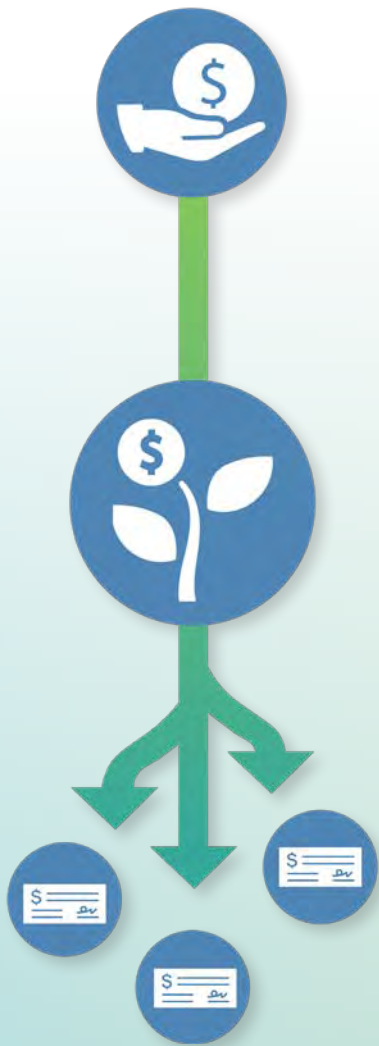
*The CFAAC Funds List does not include administrative funds.*



# DONOR ADVISED FUNDS: A SMART WAY TO GIVE

Donor Advised Funds are one of the fastest-growing financial tools on the market – and for good reason—they help donors simplify, secure, and grow their charitable dollars. Selecting the right partner in your giving comes down to what you value the most.

Deciding to establish a Donor Advised Fund at the Community Foundation of Anne Arundel County means that you have big plans for your charitable giving and you want to make an impact.



## 1. GIVE

A donor makes an irrevocable contribution to a Donor Advised Fund and **will immediately receive the charitable tax benefit.**

*CFAAC staff can help you support the organizations you love, now or over time.*

## 2. GROW

The donor may advise the investment allocation of the donated assets – **any investment growth is tax-free.**

*CFAAC offers a variety of expertly managed investment pools to help meet your short and long term charitable goals.*

## 3. GRANT

The donor may **recommend grants** to qualified public charities of their choice.

*CFAAC provides personalized engagement and funding opportunities including philanthropic and financial giving guidance, research, and educational events.*

*Grantmaking is accurate, efficient, and flexible through CFAAC's online donor portal.*

## HOW DO YOU KNOW IF A DONOR ADVISED FUND IS RIGHT FOR YOU?

Contact a member of CFAAC's staff team who will work with you to customize your giving options. Call us at 410-280-1102.

# COMMITMENT. MICHAEL'S AND CHERIE'S GIFTS OF LOVE AND LEGACY.

*The late Michael Kurtz and his late wife, Cherie Loustaunau, were partners in life and philanthropy. Michael passed away in December of 2022, just days shy of Christmas, but before he left us, he was able to share his compassionate story about Cherie.*

When Michael spoke about his late wife, Cherie, tears welled up in his eyes as he shared a vivid and loving memory of her. “As she was preparing to go to the hospital for the final time, I remember her sitting at her desk writing out the last batch of checks to go out to her designated [charity] organizations. She was that dedicated,” he said. “It was a painful moment but it is illustrative of who she was.”

Cherie, who retired after 44 years at the U.S. Department of Commerce, made time for the causes closest to her heart, routinely donating and serving on nonprofit boards and committees. So, when Michael decided to contact the Community Foundation to open an additional legacy fund in Cherie’s name, he didn’t think twice. He knew exactly where her heart was during her life. “I want to keep her name alive; that’s my motivation,” said Michael, who set up a Donor Advised Fund and two legacy estate gifts through CFAAC, including the Cherie Loustaunau Memorial Fund for the benefit of the Anne Arundel Women Giving Together (AAWGT), an endowed fund supported through his IRA that will impact the community in perpetuity. Cherie was a life member of AAWGT.

“Cherie’s whole approach to philanthropy was as it was in everything in life,” said Michael. “She did her research and made her decisions. She was very disciplined about getting money to the organizations, and she stayed in contact with them.”

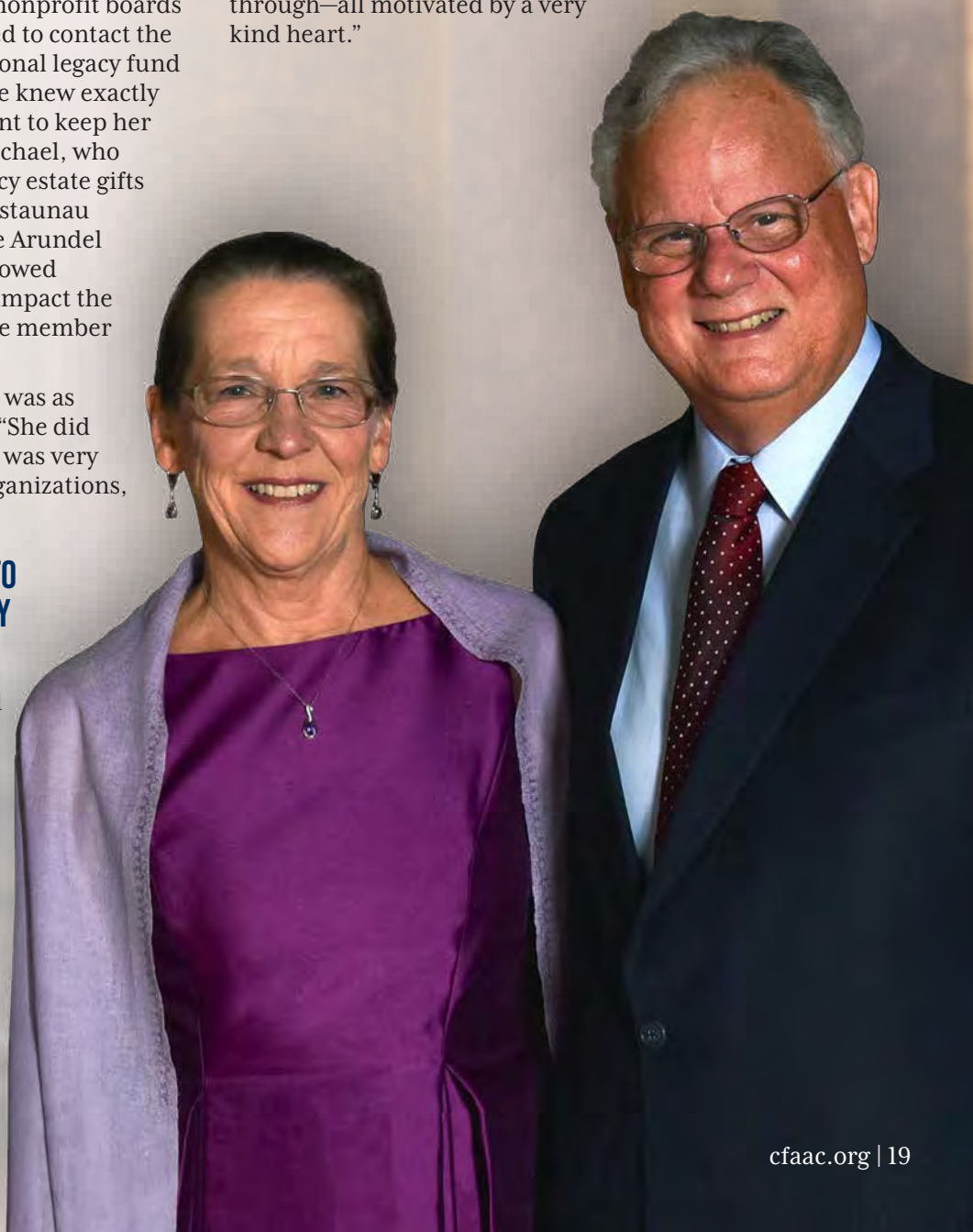
## MICHAEL BELIEVED IT WAS IMPORTANT TO HAVE AN ESTATE PLAN, AND IN IT, LEGACY INTENTIONS

So, in 2018, he established the Dr. Michael J. Kurtz Fund, a Donor Advised Fund, and named a successor advisor to continue his donations after his death. Michael also thought strategically about how he could expand his charitable giving after his lifetime and donated a life insurance policy to CFAAC to fund the Dr. Michael J. Kurtz Legacy Fund, making additional annual gifts to the Community Foundation to pay the premiums on the policy. Throughout the years, Michael communicated with the CFAAC staff about the charities he wished to benefit

from the policy as his interests changed, and in 2021, updated his fund agreement to support the Wellness House of Annapolis.

“I would say that most of us do not think about our legacies and if we do, we think about what we are giving to our children and our grandchildren; often not beyond,” he explained. “My feeling is that if we don’t leave something to the community that we care about, then society as a whole and the society in which our children and grandchildren live in becomes poorer.”

Most importantly, Michael made it clear that Cherie’s legacy was more than the financial gifts she gave. “She was a woman who had a strong social conscious, a strong sense of responsibility, and the discipline and desire to follow through—all motivated by a very kind heart.”



# COMMUNITY LEADERSHIP CIRCLE

The Community Leadership Circle is made up of generous donors who have committed gifts to support CFAAC's operational budget to ensure long-term sustainability. These investments make a real difference as we continue to provide high-quality philanthropic services to our donors, and serve the community as a thought partner, an advocate for local nonprofits, and a catalyst for new ideas and community problem-solving.


## \$35,000 TO \$50,000

Larry Clark   
ImpactAssets


## \$15,000 TO \$25,000

Chaney Enterprises Bull Roast Fund  
Cindy and Tim O'Neill  
William J. & Dorothy K. O'Neill  
Foundation

## \$10,000 TO \$14,999

Niecy and James Chambers  
Deerbrook Charitable Trust  
Jim  and Linda Humphrey  
Jim and Linda Humphrey Foundation




## \$5,000 TO \$9,999

Kathy and Chauncey Brooks III  
Larry  and Dawne Burrows Fund  
Larry Burrows and Dawne  
Widener-Burrows  
Rosalind  and Paul Calvin  
Jane Campbell-Chambliss and Peter  
Chambliss  
Campbell Property Management  
Ralph and Carlotta Crosby  
Ray and Barbara Crosby  
Crosby Foundation  
James and Sylvia Earl  
The Helena Foundation  
Barry Gossett  
Barry and Mary Gossett  
Foundation Fund  
Carl  and Anita Gutschick  
Gutschick Family Foundation  
Sabra Ladd  
Bev and Steven Marcus  
Beverly and Stephen Marcus  
Foundation  
Bruce Potter  
Kincey and Bruce Potter  
Environmental Fund  
Schwab Charitable  
Vanguard Charitable  
Greg and Susan Walker  
Greg and Susan Walker Family  
Foundation








## \$2,500 TO \$4,999

Anonymous  
Benevity Community Impact Fund  
Dr. Coryse Brathwaite  and  
Dr. Edward Zebovitz, D.D.S.  
Patty Brown and Joe Gill  
Patty Brown and Joe Gill Giving Fund  
Fidelity Charitable Gift Fund  
Mary Grace Folwell  and Jeff Riedle  
Daniel  and Tanya Mathias  
Mathias Family Foundation  
Morgan Stanley  
Jennifer Pratt   
Andrew and Leslie Price  
Raymond James Charitable  
Amy Beth Tate   
Bill Thompson  
United Way of Central Maryland  
Martha Van Woerkom   
Wells Fargo Advisors  
Robert and Ann Whitcomb

## \$1,000 TO \$2,499

Anonymous  
Steven Ames  
Patricia P. Baum  
Andrea  and Christopher Beegle  
Beegle Family Fund  
Beer Family Fund  
Katharine H.  and Harry Caldwell  
Ron Council  
Council Family Foundation  
Carol and David Cronin  
Frederick Galloway  
Collot Guerard  
Anne  and Warren Hamel  
Hamel Family Fund  
David Hankey  
David and Jan Hoffberger  
Tom and Prue Hoppin  
David and Tove Irving  
Ron and Nan Jarashow  
Jon and Kathy Korin  
Katie Leavy

## \$1,000 TO \$2,499, CONTINUED

Michael  and M. Katherine Lehr  
Richard Lerner  
Arthur Little and Barbara Tymkiw  
David  and Kim Mitchell  
Jim and Nancy Nolan  
Joyce Olin and Christopher Nelson  
Optum Health  
Mike and Sue Pitchford  
John  and Priscilla Rosso  
John B. and Mary E. Slidell  
Mary  and Dale Spencer  
Mary and Dale Spencer Charitable  
Fund  
Raymond Streib  
Trish and Greg  Strott  
Trish and Greg Strott Fund  
The U.S. Charitable Trust  
UBS Financial Services  
Dr. Neil Weissman   
Karen Whaley 

## \$500 TO \$999

Anonymous  
Tara Balfe Clifford  
Tillie & William Blumstein Family  
Foundation  
Gene Deems  
Deems Digital Foundation  
Thelma DeLaGrange  
Steve and Carolyn Derby  
Koch Family Foundation, Inc.  
Becki Kurdle   
Katie McDermott  
Vincent Moulden   
RBC Wealth Management  
Carol Bolton Sisco  
Lisa Smith  
Frederick C. Sussman, Esq.  
Sally Vavrek

## UP TO \$499

Anonymous (12)  
Marty Adelman  
Anne Agee



## UP TO \$499, CONTINUED

Mark Alexander  
Rebecca Allyn  
Randi Altschuler  
AmazonSmile Foundation  
John Andryszak  
Glenn and Shannon Bachman  
Damika Baker-Wilson 🍷  
Ball Corporation  
Barlow Research Associates  
Sandy Bartlett  
Jamie and Laura Baxter  
Anthony Bent  
Sigval Berg  
Georgie and Ted Berkinshaw  
Bowen Billups  
Sharon Boettinger  
Bruce and Janice Bolten  
Arlene Bowes  
BrandHoot, LLC  
Karene Brodie  
Florence Calvert  
The Calvert Real Estate Group  
Charles, S. & Marilyn D. Carey  
Living Trust  
Maria Carrasquilla  
Vanessa Carter  
Catalent Pharma Solutions  
Betsy and Arthur Chotin  
Rosemary and William Claire  
Ruth Anderson Coggeshall  
Jeanne Cooper  
Georgianna Crosby  
Danielle and Gary Cruttenden  
Dorothy A. Darrah  
Facebook  
Richard and Carole Falk  
James Fitzpatrick  
Patricia Ann Frese  
Paul Gabriel-Tucci and Janice  
Gabriel-Tucci  
Gary and Trish Gallant  
Gallant Government & Law Group, LLC  
Teresa Galligan  
Anthony Gamboa  
Doug and Laurie Garey  
Give Lively Foundation  
John Gloss  
Susan Haesaert  
Barbara Haight  
Sabra and Peter Hill

Hillman Family Charitable Trust  
Richard and Lisa Hillman  
Pamela Holland  
Gwen and Jerry Hoyt  
Veronica James  
Keith Jamison  
James Kaper  
Elizabeth Knupp  
Jennifer Lagrotterai  
Bess and Eric Langbein  
Langbein Family Endowment Fund  
Marty Liggett  
Brad and JoAnne Long  
Kathy 🍷 and Scott Luthcke  
LynnCo LLC  
Joanne Main  
Joy Mathisen Ambrogio  
Debbie Mayer  
Townsend McNitt  
Vollie and Maggie Melson  
Taylor and Mike Milbradt  
Jennifer Moll  
Moms for Mental Health  
Network for Good  
OBXtek Inc.  
Susan Okula  
Joanne Olson  
Kimberly Ross Page  
Alecia Parker  
Leigh A. Penfield  
Anna Petto  
Lara Phippen  
Barbara and Richard Pleva  
Providence Center  
Tracey Pryce  
R J Sullivan LLC  
Traci Ramsey  
RBC Capital Markets, LLC  
Elaine Reed  
Philip Reynolds  
Sue Ann Ricciardi  
Samara Richardson  
Ashley Robison St. Clair 🍷 and  
Wesley St. Clair  
Michael L. Sanders  
Jane Seiss  
Chantel N. Sanford Smith  
Cristina Smith  
Lisa Snowden  
Carolyn Sonnen  
The Sparer Family Trust

Marjorie Sparer  
T. Rowe Price Program for  
Charitable Giving  
Judy Templeton  
Leslie Tilghman  
Dr. Richard Tompkins  
David Troy  
Karen Lee Clark Revocable Trust  
United Health Group  
Lisa VanBuskirk  
Kay Welti  
Susan Williamson  
Yumei Winebrenner  
Anna Wood  
Bill and Joan Woodward  
Richard T. and Marcia Wright  
YourCause, LLC  
Renee Houston Zemanski 🍷 and  
Greg Zemanski

2022 or 2023 CFAAC Board Member 🍷

2022 or 2023 CFAAC Staff Member 🍷



# FUND FOR ANNE ARUNDEL



Every child deserves a happy, healthy future. That's why over the past four years the grants from CFAAC's Fund for Anne Arundel (FFAA) were directed to nonprofits that prioritize the physical, mental, and behavioral health of children and families. Since the FFAA's inception, CFAAC has raised \$1,349,771 to support it, half of which was placed into the fund's endowment to ensure its grantmaking power will continue. The FFAA is growing in its impact as interested community members continue to pool together their resources to support it. In 2022, CFAAC distributed seven grants to nonprofits totaling \$182,315 through the Fund for Anne Arundel.

In 2022, FFAA grant recipients included CASA of Anne Arundel County, Seeds 4 Success, Start the Adventure in Reading (STAIR) – Annapolis, Inc., Girls on the Run of the Greater Chesapeake, Severna Park Community Center, Superior Future, Inc., and The Complete Player Charity.

## FUND FOR ANNE ARUNDEL 2022 GIFTS

### \$500,000+

Larry Clark  
Deerbrook Charitable Trust

### \$5,000+

Madelyn Schaefer  
Schaefer Family Fund

### \$1000+

Schwab Charitable  
Peter and Daphne Summers  
Jonathan and Erin Williams  
Williams Family Fund

### UP TO \$500

Kimberly Broadie  
Bryan T. Fishback  
Frank and Laura Gagliardi  
Michelle Johnston Smith  
Mr. and Mrs. David Stern

## DID YOU KNOW?

Since its inaugural grantmaking in 2020, the Fund For Anne Arundel has made 18 grants totaling \$536,565.

To learn more about the Fund For Anne Arundel, visit: [cfaac.org/fund-anne-arundel.html](http://cfaac.org/fund-anne-arundel.html)



# GRATITUDE. IT'S WHAT KEEPS DAVID IRVING GOING EVERY DAY. WELL, THAT AND MATH.



“I try to base everything on gratitude. I am truly grateful because I am so blessed and have been given so much; and I am grateful to give some of that back, whether it’s time or money. I try to do it with a smile. I have specific areas of focus and it’s all tied back to education.”

More than 20 years ago, David immersed himself in the education field, learning through his jobs at The Association for Supervision and Curriculum Development and Delta Education. Then, David founded HigherSchool Publishing Company and published *The Parent’s Guide to Better Grades, 7 Steps to Improve Your Child’s Academic Performance*. After that, David started HigherSchool Tutoring and then, created HigherSchool Instructional Services. He launched CollegeReadyMath in 2016 and subsequently retained ownership of it after selling HigherSchool in 2020. CollegeReadyMath focuses on algebra and getting students ready for college, which David believes to be his life’s mission. “I really love what I do and feel that what we do will eventually make a huge difference in the lives of a lot of students.”

## DAVID’S VENTURE IN MATH STARTED IN A SURPRISING WAY...

Successful in financial sales and working for a Chicago investment firm, David was invited to volunteer at an inner city Chicago school to be “Principal for the Day.” It changed him, and he ended up going back to that same school every year for six years.

“It was a real eye opener to see a school that’s over 100 years old ... with missing windows in the dead of winter and kids who came to school with the same clothes they had on the day before. Most of them weren’t even getting a quality education because of the high teacher turnover in the school, which ultimately contributed to inconsistent instructional quality.”

After that experience and more than 25 years in financial sales and trading, he made the decision to commit the remainder of his career to improving the academic opportunities available to economically disadvantaged students.

**“I THINK IT’S IMPORTANT TO BE A PART OF THE COMMUNITY YOU ARE IN AND GIVE BACK TO THOSE WHO ARE LESS FORTUNATE IN THAT COMMUNITY ... THE COMMUNITY FOUNDATION ALLOWS ME TO DO THAT.”**

David joined CFAAC’s board in 2022 and opened a Donor Advised Fund soon after. While he admits there’s still a lot for him to learn, he knows that he can count on CFAAC to help him identify where his funds can best be applied. “There are so many areas of need that you have to prioritize; you have to set your focus as to what those needs are and then stick to that. The Community Foundation can help me do that. They provide support and they help keep donors’ assets safe.”



# Celebration of PHILANTHROPY

Every year at our Celebration of Philanthropy we honor extraordinary community members and organizations who not only change lives, but also inspire others to make an impact. To date, we have honored 110 community members and organizations who give back in ways both large and small – investing in education, gathering donations, mentoring children, helping the homeless, and making our community a better place for all.

Our 22nd Annual Celebration of Philanthropy Awards Luncheon was a sold-out event, held on November 4th at The Graduate Hotel in Annapolis. Learn more about each recipient and find information for the 2023 Celebration of Philanthropy Awards Luncheon at [www.cfaac.org/celebration-philanthropy.html](http://www.cfaac.org/celebration-philanthropy.html)



SCAN TO WATCH  
EVENT HIGHLIGHTS



**CAROL SISCO**  
*Philanthropist  
of the Year*

*Pictured: Mary Grace Folwell,  
Carol Sisco, and Mary Spencer*



**TATIANA KLEIN**  
*Volunteer  
of the Year*

*Pictured: Vincent Moulden,  
Tatiana Klein, and Mary Spencer*



**ELLA EDWARDS**  
*Young Volunteer  
of the Year*

*Pictured: Dr. Coryse Brathwaite,  
Ella Edwards, and Mary Spencer*



**LIVE! CASINO HOTEL MARYLAND**  
*Corporate Philanthropist  
of the Year*

*Pictured: John Rosso Jr.,  
Ryan Eller, and Mary Spencer*



**LEO ZERHUSEN**  
*Carol Thompson Lifetime  
Achievement Award*

*Pictured: Larry Burrows,  
Leo Zerhusen, and Mary Spencer*



**CALANDRA DIXON LAYNE**  
*Carroll H. Hynson, Jr. Award for  
Diversity, Equity, and Inclusion in  
Philanthropy*

*Pictured: Andrea Beegle, Calandra  
Dixon Layne, and Mary Spencer*



**BRUCE MORGENSTERN**  
*Boots on the  
Ground Award*

*Pictured: Dr. Neil Weissman,  
Bruce Morgenstern, and  
Mary Spencer*



**THE ESTATE OF DONALD AND  
EMILY SHEETS**  
*Legacy Award for Planned Giving*

*Pictured: Katherine H. Caldwell  
accepting the award on behalf of the  
late Donald and Emily Sheets*





1. 2022 Philanthropist of the Year, Carol Sisco, Dick Franyo, and Michelle Eichhorn
2. 2022 CFAAC Staff Members: Renee Houston Zemanski, Rosalind Calvin, Ashley Robison St. Clair, Mary Spencer, Kathy Luthcke, Damika Baker-Wilson, Kelli Williams, and Rosemary Calderalo
3. Peter Chambliss and Jane Campbell-Chambliss
4. CFAAC Board Chair, Jim Humphrey welcoming guests at the 2022 Celebration of Philanthropy Awards Luncheon
5. 2022 Young Philanthropist of the Year, Ella Edwards
6. Del. Shaneka Henson, Kris Valerio Shock, Kalah Zeigler, County Exec. Stuart Pittman, Dr. Coryse Brathwaite, and Beryl Downs
7. Anna E. Greenberg, Mary Spencer, and Larry Burrows
8. 2022 Carol Thompson Lifetime Achievement Awardee, Leo Zerhusen (left), speaking with Bill Thompson, husband of the late Carol Thompson



# 2022 CELEBRATION OF PHILANTHROPY SPONSORS

<b>PLATINUM</b>		<p>THE JIM &amp; LINDA HUMPHREY FOUNDATION</p>			
<b>GOLD</b>	<p><i>Tara</i> BALFE CLIFFORD</p>	<p>Anne Arundel Medical Center Foundation Luminis Health.</p>  <p><i>Carol B. Sisco</i></p>			
<b>SILVER</b>				 <p>THE MASON COMPANIES</p>	
<b>BRONZE</b>	<p>AACC Foundation Boatyard Bar &amp; Grill Larry Burrows &amp; Dawne Widener-Burrows Carl &amp; Anita Gutschick Mr. &amp; Mrs. David Mitchell</p>		<p>Rosso Commercial Real Estate Services Shore United Bank Bill Thompson Martha Van Woerkom</p>		
<b>FRIENDS OF PHILANTHROPY</b>	<p>Annapolis Maritime Museum Harry &amp; Kate Caldwell Mary Grace Folwell &amp; Jeff Riedle Hague Quality Water of Maryland</p>	<p>Warren &amp; Anne Hamel The Junior League of Annapolis, Inc. Monarch Cybersecurity LLC John Olson, CFP, RICP, MBA</p>	<p>Mary &amp; Dale Spencer Greg &amp; Trish Strott Dr. Neil J. Weissman Karen M. Whaley, CPA</p>		
<b>MEDIA PARTNER</b>	<p><b>WHAT'S UP? MEDIA</b></p>				



# PROFESSIONAL ADVISOR RECOGNITION SOCIETY

The Community Foundation of Anne Arundel County launched its Professional Advisor Recognition Society at the 2022 Celebration of Philanthropy, naming six inductees to its inaugural class. The Community Foundation of Anne Arundel County created the Professional Advisor Recognition Society to acknowledge professional advisors for their commitment to the community and their work to support philanthropy and encourage charitable giving across Anne Arundel County. You can learn more about each of these dedicated members at [cfaac.org/PARS](http://cfaac.org/PARS).

Pictured below, from left to right, are the 2022 inductees:  
**Richard T. Wright of The Wright Firm**  
**Karen M. Whaley of Karen M. Whaley, CPA**  
**Chadwick (Chad) Watson of Charter Financial Group**  
**Michael E. Lehr of Sims & Campbell**  
**Christine W. Hubbard of the Law Offices of Christine W. Hubbard, LLC**  
**Frank Campbell of Sims & Campbell**



## DID YOU KNOW?

When transferred directly from your IRA to CFAAC, Qualified Charitable Distributions (QCDs) up to \$100,000, will be excluded from your taxable income, even if you don't itemize.

To learn more, contact your financial advisor or John Rodenhausen, CFAAC's Director of Gift Planning, at 410.280-1102 x103



# **INSIGHT.** A TRIP AND A BABY SEA LION CHANGED ANDREA BEEGLE'S LIFE PERSPECTIVE.

Before she attended University of California, Berkley, to pursue a lacrosse scholarship, Andrea hadn't traveled much out of her close-knit Anne Arundel County neighborhood. In fact, her family and friends were wondering how long she would last in California. She made it, graduating cum laude in Mass Communications. After graduation, Andrea and her friends set out to "save the world," backpacking in parts of South America including the unique and pristine Galapagos Islands.

"I was sitting on a rock [in the Galapagos] and a baby sea lion came all the way up and jumped on my lap and began snuggling and kissing me. I thought, 'what just happened? This is what life is when you don't live in fear. This is harmony.' That moment really changed my perspective and actually inspired my career path; I knew I wanted to foster life-changing opportunities for more people."

## **ANDREA DESCRIBES HERSELF AS "A FINANCIAL ADVISOR WITH A NONPROFIT HEART."**

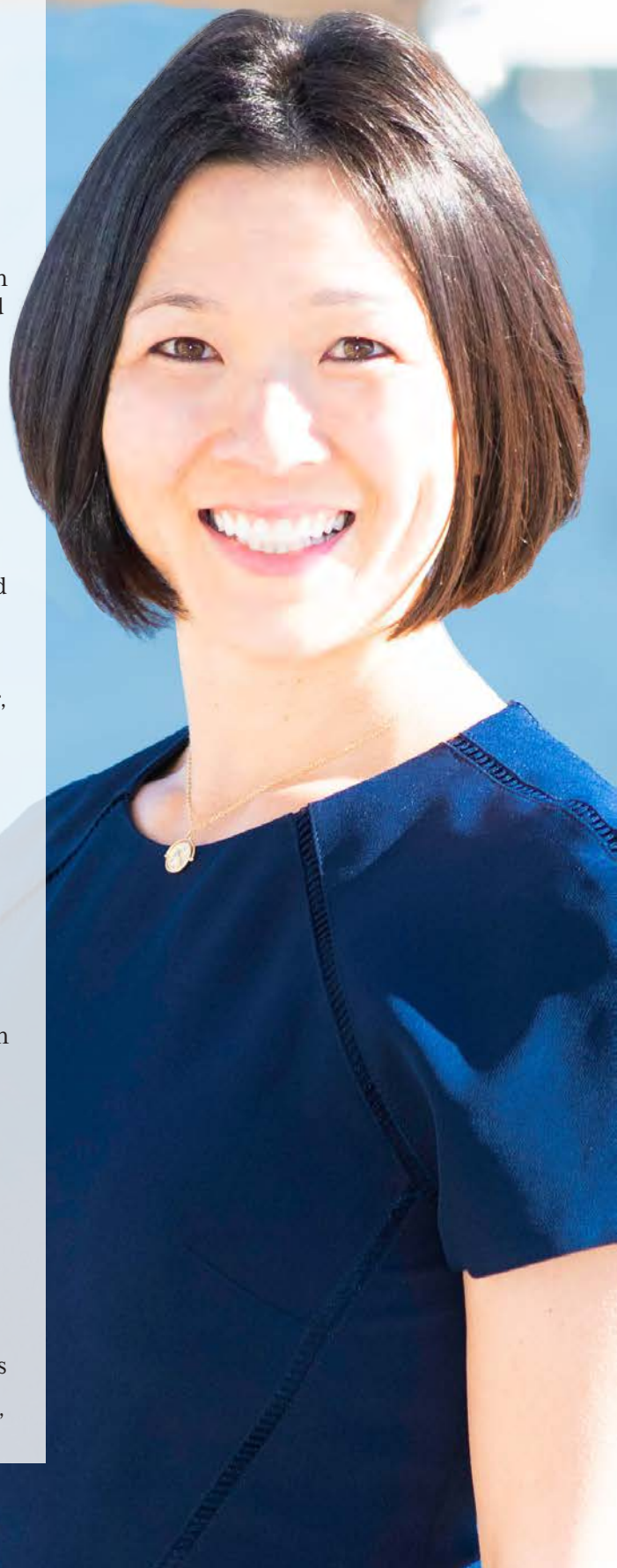
Andrea returned east and launched a 15-year career in nonprofit management, working at National Geographic, the United Nations Foundation, the Global Alliance for Improved Nutrition, and ultimately starting a 501c3 focused on maternal and early childhood nutrition. She has raised millions for causes; mobilized hundreds of thousands of supporters around issues of health, sustainable development, and social justice; and managed partnerships with celebrities, media, Fortune 500s, governments, and more. However, she always had a dream to work with her life-long mentor and father. In 2019, that dream came true. Andrea is working as a financial advisor beside him at Compass Wealth Strategies.

## **A GOOGLE SEARCH BROUGHT ANDREA TO THE COMMUNITY FOUNDATION. AFTER THAT, IT WAS LOVE AT FIRST SIGHT.**

"There are so many issues and causes that it's hard to pick just one. So, when I was looking to get involved in my community and where to spend my time and resources, I wanted to find an organization that was at the heart of them all. I found the Community Foundation. I literally sent a cold-call email and was delighted when that email was answered with a warm response and invitation to learn more and get involved."

Andrea got involved immediately with the Celebration of Philanthropy, subsequently joining the CFAAC board. "The Community Foundation has broadened and deepened my sense of community. I feel more aware, more committed, more engaged. Really, I want to thank the Community Foundation for giving me a way to be a better neighbor."

In 2021, Andrea, her husband, and their three young kids opened a Donor Advised Fund. "The issues facing our community are interconnected, so it makes sense to invest in an organization that is at the intersection of them all. When your head and your heart are in the same place, that's how you know that you are on a good path."



# FINANCIAL SUMMARY

## COMBINED STATEMENT OF FINANCIAL POSITION

	12/31/2022*	12/31/2021
<b>Assets</b>		
Cash and Cash Equivalents	\$ 1,518,717	\$ 1,196,737
Contributions and Other Receivables	\$ 233,597	\$ 234,596
Investments	\$ 22,418,105	\$ 22,394,226
Other Assets	\$ 2,976,331	\$ 2,847,533
<b>Total Assets</b>	<b>\$ 27,146,750</b>	<b>\$ 26,673,092</b>
<b>Liabilities and Net Assets</b>		
Liabilities	\$ 1,968,474	\$ 424,628
Agency Funds	\$ 1,358,497	\$ 1,506,090
Net Assets	\$ 23,819,779	\$ 24,742,374
<b>Total Liabilities and Net Assets</b>	<b>\$ 27,146,750</b>	<b>\$ 26,673,092</b>

## COMBINED STATEMENT OF ACTIVITIES

### Support and Revenue

Contributions	\$ 6,318,863	\$ 4,867,048
Special Events	\$ 0	\$ 239,000
Other Income	\$ 4,629	\$ 14,872
<b>Total Support and Revenue before Investment Returns</b>	<b>\$ 6,323,492</b>	<b>\$ 5,120,920</b>
Investment Income or (Loss)	\$ (2,621,721)	\$ 2,569,916
<b>Total Support and Revenue</b>	<b>\$ 3,701,771</b>	<b>\$ 7,690,836</b>

### Grants and Expenses

Grants and Charitable Expenditures	\$ 4,138,366	\$ 4,014,865
Operating Expenses	\$ 486,000	\$ 450,433
<b>Total Grants and Expenses</b>	<b>\$ 4,624,366</b>	<b>\$ 4,465,298</b>
Change in Net Assets	\$ (922,595)	\$ 3,225,538
Beginning Net Assets	\$ 24,742,374	\$ 21,516,836
<b>Ending Net Assets</b>	<b>\$ 23,819,779</b>	<b>\$ 24,742,374</b>

\*Unaudited Figures. Audited Financial Summary available upon request when completed.

## FUND BALANCES INTENDED FOR GRANTMAKING

(Endowed and Non-Endowed Funds)

Discretionary	\$ 1,529,976
Designated Purpose	\$ 1,293,721
Nonprofit Endowment	\$ 1,389,884
Corporate Advised	\$ 1,369,226
Donor Advised	\$ 14,840,799
Field of Interest	\$ 206,727
Giving Circle	\$ 558,251
Scholarship	\$ 555,060
Pledges	\$ 3,271,844



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

Contact us at  
410.280.1102.



# GIFTS MADE IN HONOR OR MEMORY

The contributions listed below honor the memory of a loved one, pay tribute to a friend, or commemorate an anniversary, graduation, milestone, or special occasion. Contributions can be directed to a previously established fund at the Community Foundation or, in some cases, directed to new funds established in honor of that person or event. These gifts create a lasting legacy with the potential to positively impact the community for years to come.

## ANDREW KIRACOFÉ MEMORIAL FUND

### *In memory of Andrew Kiracofé*

Sarah Brown  
Fidelity Charitable Gift Fund  
Scott Kaspick and Susan Termohlen  
Kaspick/Termohlen Family Fund  
Kate, Matt, and Maezie Jane  
Phil and Lindsay Kiracofé  
Alice Leich  
Christopher Leich  
Christine Nicolov  
Emily Parkhurst  
Silicon Valley Community Foundation  
Wilson Perumal & Company  
Harriet Yaffe

## ANNA E. GREENBERG LEADERSHIP FUND

### *In honor of Anna Greenberg*

Larry Burrows and Mrs. Dawne  
Widener-Burrows  
Larry and Dawne Burrows Fund  
Vanguard Charitable  
National Philanthropic Trust  
David and Lily Openshaw  
Ron and Joan Pinsky

## ANNE ARUNDEL COUNTY ANIMAL CONTROL FUND

### *In memory of Buddy*

Jurick, Robert, and Penelope

### *In memory of Bentley and Fatty Celtis*

Jacqueline Wilkotsz

### *In memory of Wayne and Elizabeth DeBow*

Sharon and Jackie Moffatt

### *In honor of Mary Ellen*

Mary Weigand

### *In memory of Feather*

Marlise Mason

### *In memory of Maura Jewett*

Leslie Jewett

Jade Klinger

### *In memory of Shelley Mick*

Jill Caravan

Caren Cramer and Family

Greg and Mary Fries

Patt Howell

Lucinda Soltys

### *In honor of Kitten Adoptees: Pedro Jones and*

### *Carrie May*

Carol McNitt

### *In honor of Camille and Bob Privette*

Michael Spurlock

### *In memory of George H. Ruggles*

Nancy Mullen

### *In Memory of Ellen Shiery's cat, Maggie*

Ashley Robison St. Clair

### *In honor and memory of Betty White*

Melissa Badger  
Marcia Brown  
Alison Cherowitzo  
Rebecca Daniels  
Sue Dunaway  
Joan Duryee  
Brittany Eyring  
Janice Elizabeth Fliggins  
Neil Leo Fluhr  
Lauren Garber  
Donna C. Gardner  
John Halmi  
Barbara Halpern  
Denise Harbaugh  
Lawrence C. Herzig  
Joanna Hopkinson  
Cassandra E. King  
Janea Lakis  
Zoe C. Larbig  
Ruth Lopez  
Margaret M. Mardiros  
Shannon Mavica  
Frances McMahon  
Casey Merolla  
Julie Nauroth  
Christie Ann Petrovich  
Chad S. Phillips  
Sophia Phillips  
Erin Rauth  
Stacy Robinson  
Jim Rosenthal  
Angela Tipton  
Denise Tolbert  
D. Edward Vogel  
Debbie Warman  
Joan Wright  
Patti Wulff

### *In memory of Mike Williams*

Richard Williams

### *In honor of Isla Zink*

Addie K/Isla Z

## ANNE ARUNDEL COUNTY FIRE DEPARTMENT FUND

### *In memory of Wayne Brown*

Judy Mahoney

### *In memory of David Oplinger*

Debbie and Mike Barrett

Marianne Oplinger

Wendy Wilson

### *In memory of Geneva Smith*

Maria and Art Cederakis

Lindsay Morris

Beverly Anne Petrucco

George Petrucco

## ANNE ARUNDEL COUNTY POLICE DEPARTMENT FUND

### *In memory of Terry January*

Cathi Forbes

Eric Colvin

FOP Lodge 70

Raab, Matt, and Heather

## ANNE ARUNDEL COUNTY WOMEN GIVING TOGETHER GRANT FUND

### *In honor of Bronwyn Belling*

Rosemary Claire

### *In memory of Andrew Kiracofé*

Emily Parkhurst

### *In honor of Marion Kryza*

Kathleen Kryza

Schwab Charitable

### *In memory of Emily Schindler*

Jane Schindler

## BATZOLD CHIEN CHARITABLE FUND

### *In memory of Fred Batzold*

Bank of America Charitable Foundation

Mark and Judith Chien

Nadine Chien

## BETSY BROWN RUZZI EDUCATION FUND

### *In honor and memory of Betsy Brown Ruzzi*

Anonymous (3)

Jane Abitanta and David Paul

Katherine Armendt and Ross Sorci

Bank of America Charitable Foundation

James R. Banks and Claire M. Stackhouse

Cathy Barclay

Tim and Sue Barnicle

Dave and Joan Barram

Sandra Bhyrne

Scott Bourdeau

Paul and Paula Chaney

Charles E. Taylor

Charles Corey

Dennis and Ellen O'Brien

Fidelity Charitable Gift Fund

Gina and Brian Flood

Gretchen R. Cheney

Jeff Hahn

Susan and Charles Hahn, Betsy's Parents

Rachel Hise

Susan and Keith Jacobs

Joss Family Fund

Robert Joss

Jacqueline Kraemer

David and Diane Mandel

Rodney Marshburn

Allister Nelson

Wilke and Karen Nelson

Ralph and Jill Nigro

*In honor and memory of Betsy Brown Ruzzi,  
continued*

Emily Nissan  
OM and Saraswati Bahethi Foundation USA, Inc  
Ina Rosenthal  
Schwab Charitable  
Bob Schwartz and Nancy Hoffman  
Susan Sclafani  
Doug Smith  
Vivien Stewart  
Susan Sullivan  
Marc Tucker and Kathy Bonk  
Matt Tucker  
Bill and Jeanne Worrall  
Harold Zahn

**BO DEPAOLA FAMILY FOUNDATION FUND,  
BO'S EFFORT**

*In memory of Bo DePaola*

The Ann & Frank Cahouet Foundation  
Bo's Effort  
Crossfire 321, LLC  
John and Jill DePaola  
Fidelity Charitable Gift Fund  
Izzo Family Foundation  
Marlene Long  
Vance and Sherri Mitzner  
Network for Good  
Toyota of Bowie  
Sandra Tylor

**CAPITAL GAZETTE MEMORIAL  
SCHOLARSHIP FUND**

*In memory of Mary Grace Scoggins*

Katharine Moore

**CAROL THOMPSON FUND**

*In memory of Carol Thompson*

Brenda and David Brown  
Bill Thompson

**COMMUNITY CRISIS RESPONSE FUND**

*In honor of Anne Hamel*

Alison Gilbert

**COMMUNITY LEADERSHIP FUND**

*In honor of Rebecca Allyn*

Rebecca Allyn

*In honor of Bud Billups*

Bowen Billups

*In memory of Tillie & William Blumstein*

Tillie & William Blumstein Family Foundation

*In honor and memory of Helen Eileen Clapsadle*

Anonymous  
Catalent Pharma Solutions

*In memory of Ernest Clayton, Jr.*

Marty Liggett

*In memory of Thomas Michalowicz*

Marty Adelman

*In memory of Edward Muller, III*

Mark Zablotny

*In memory of Jerry Sparer*

Marj Sparer  
The Sparer Family Trust

*In honor of Greg Strott*

Bowen Billups

*In memory of Paul Vlasakder*

Dr. Richard Tompkins

**DANNY'S FUND**

*In memory of Danny Gerety*

Margie Kosmerl  
Live Give Run Foundation, Inc

**EWE SPIRIT FUND**

*In memory of Geoff Ewenson*

Christina Mudd  
Mark Wheeler

**GALEN'S GIFT**

*In memory of Galen Meehan*

Sheila Meehan

**JOHN STARR MEMORIAL MUSICIAN'S FUND**

*In memory of John Starr*

Marie Brockhurst  
Brad Feldman  
Ashley Newman  
Richard and Barbara Pleva  
Nicholas Sharp  
Mary and Dale Spencer  
Mary and Dale Spencer Charitable Fund

**KAREN FELDMAN ENDOWMENT FUND FOR  
SEEDS 4 SUCCESS**

*In honor of Victoria Dundics*

Gabrielle Campbell

*In memory of Karen Feldeman*

Anonymous (2)  
Matthew Martelli  
Cynthia McKee  
Angela and Edward Ponatoski  
Thomas Streiff  
Les Ward  
Everett and Tsili Wolf

**PERINATAL LOSS FUND**

*In memory of Chandler John Norton*

James and Elizabeth Norton

**TRUDY MCFALL FUND**

*In honor of Trudy McFall*

Homes for America

**WOMEN AND GIRLS FUND**

*In memory of Paul E. Taylor, Jr.*

Margaret Taylor



**SPECIAL PEOPLE DESERVE  
SPECIAL RECOGNITION**

**A truly thoughtful way to  
remember others.**

CFAAC offers many opportunities to help you recognize special people who have made a difference in your life and in the life of the community. We accept donations made as a tribute or memorial to an individual, family, or organization. Special funds can also be created to handle specific tributes and memorials.

Contact us to learn more:  
410.280.1102 or visit  
[cfaac.org/Legacy](http://cfaac.org/Legacy)



# DISCRETIONARY FUND GRANT PROGRAMS

CFAAC distributed nearly \$4 million dollars in community grants last year to a variety of nonprofit organizations. The following focused community grant programs help to fund programs or initiatives that make Anne Arundel County a great place to live for all.



## ARTS AND CULTURE ANNE ARUNDEL FUND

This fund was created to enhance the vibrancy and creativity of Anne Arundel County. Grants are used to provide access and opportunities for economically challenged individuals and families to experience and/or participate in visual, fine, decorative, and folk arts as well as literature and language programs.



## COMMUNITY CRISIS RESPONSE FUND

This fund provides flexible financial assistance to Anne Arundel County nonprofits immediately following a violent incident, natural disaster, or other crisis in our community. In 2022, grants were awarded to nonprofits that provided human services and emergency assistance, as well as health, mental health and educational resources.



## ENVIRONMENT ANNE ARUNDEL FUND

The fund supports Anne Arundel County nonprofits working to protect and improve the environment in the County and the Chesapeake Bay. Grants support projects that improve and green communities, address environmental issues such as stormwater, and/or increase student awareness and involvement in the restoration and protection of the Chesapeake Bay, local streams and rivers, and other natural areas.



## FUND FOR ANNE ARUNDEL

This fund was created to strategically align CFAAC's grantmaking with the findings of its Community Needs Assessment Report: *Poverty Amidst Plenty VI*. This fund supports nonprofits doing vital work to address the most pressing needs of Anne Arundel County residents now and in the future. Read more about the FFAA on page 22.



## GRANTS 4 TEACHERS FUND

This fund supports highly creative ideas that would otherwise be impossible due to school system funding constraints. Grants support teachers' imaginative ideas to stimulate and inspire Anne Arundel County Public School students' learning such as allowing teachers to help students find and follow their passions.



## HELP OUR NEIGHBORS FUND

This fund provides grants to local nonprofits that assist individuals and families in need by providing emergency assistance, such as covering immediate living expenses like paying rent to prevent eviction, utilities to prevent shutoff, fees for transportation to work or car repair, or for essential medication and medical care to return to or maintain their health.





## STRENGTHENING NONPROFITS FUND

The fund provides support for local nonprofits through *Community Impact Speaker Series* training programs, and events that assist Anne Arundel County nonprofits to develop organizational capacity around fundraising, nonprofit management, board development, marketing and communications as well as other capacity-building opportunities.



## WOMEN AND GIRLS FUND

Grants from this fund are used to support nonprofits that help women and girls pursue positive, productive lives by helping remove barriers for women and girls, increase their economic security, enhance their well-being and safety, and empower them to make positive life decisions for themselves and their families.

**LEARN MORE ABOUT HOW CFAAC HELPS  
BUILD AND STRENGTHEN OUR COMMUNITY  
AT [WWW.CFAAC.ORG/GRANTS.HTML](http://WWW.CFAAC.ORG/GRANTS.HTML)**

## CFAAC'S DISCRETIONARY FUNDS DONORS

CFAAC's Discretionary Grant Funds allow us to respond to emerging needs in our community. These funds are targeted to a field of interest and are broad in scope, allowing us the flexibility to use the funds where they can have the greatest impact. *Fund for Anne Arundel donors are listed on page 22.*

### \$10,000+

#### *Strengthening Nonprofits Fund*

Andrew and Leslie Price

### \$5,000 TO \$7,499

#### *Help Our Neighbors Fund*

The Honorable Beverly Sherman Nash

### \$1,000 TO \$2,499

#### *Grants 4 Teachers Fund*

Bud Billups

Madelyn Schaefer

Schaefer Family Fund

The Sunshine Fund

#### *Strengthening Nonprofits Fund*

John and Jill DePaola

Bo DePaola Family Foundation Fund, Bo's Effort

### \$500 TO \$999

#### *Environment Anne Arundel*

Dr. Tyson Bross

#### *Help Our Neighbors Fund*

Thomas Croghan

The Vineyards at Dodon

Mike and Lisa Pellittiere

### UP TO \$250

#### *Grants 4 Teachers Fund*

Fidelity Brokerage Services LLC

Frank & Laura Gagliardi

Barbara & Richard Pleva

Barnett and Francine Rattner

#### *Help Our Neighbors Fund*

Fidelity Charitable Gift Fund

The Light House Homeless Prevention Center

Alecia Parker

David Southwick

#### *Women and Girls Fund*

David and Jan Hoffberger

Sharon Lanasa

Barbara & Richard Pleva

Ashley Robison St. Clair

Margaret Taylor

# 2022 CFAAC GRANTEES

Alliance for the Chesapeake Bay  
 American Bird Conservancy  
 American Cancer Society  
 American Civil Liberties Union  
 Foundation of Maryland, Inc.  
 American Diabetes Association  
 American Heart Association Greater  
 Washington Region  
 American Pediatric Surgical Association  
 Foundation  
 American Red Cross - National Capital  
 & Greater Chesapeake Region  
 American Red Cross - Southern  
 Maryland Chapter  
 Americares  
 Annapolis Film Festival, Inc.  
 Annapolis Green  
 Annapolis High School  
 Annapolis Immigration Justice Network  
 Annapolis Maritime Museum & Park  
 Annapolis Opera  
 Annapolis Summer Garden Theatre  
 Annapolis Symphony Orchestra  
 Annapolis Yacht Club Foundation  
 Anne Arundel - Annapolis Community  
 Emergency Response Team  
 Anne Arundel Community College  
 Foundation  
 Anne Arundel Conflict Resolution  
 Center  
 Anne Arundel County Animal Control  
 Anne Arundel County Department of  
 Aging  
 Anne Arundel County Department of  
 Social Services  
 Anne Arundel County Fire Department  
 Anne Arundel County Food Bank  
 Anne Arundel County Partnership for  
 Children, Youth and Families  
 Anne Arundel County Police  
 Department  
 Anne Arundel County Public Library  
 Foundation  
 Anne Arundel County Recreation &  
 Parks Department  
 Anne Arundel County Watershed  
 Stewards Academy, Inc.  
 Anne Arundel Women Giving Together  
 Arts Council of Anne Arundel County  
 Arundel Christian Church  
 Arundel House of Hope  
 Arundel Lodge, Inc.  
 Arundel Rivers Federation  
 Arundel Volunteer Fire Department

Asbury Church Assistance Network  
 Assistance League of the Chesapeake  
 Banneker-Douglass Museum  
 Foundation, Inc.  
 Bay Journal Media  
 Bello Machre, Inc.  
 Bemorecaring, Inc.  
 BirdsCaribbean  
 Bishop McNamara High School  
 Bkind, Inc.  
 Blessed in Tech Ministries Incorporated  
 Boy Scouts of America, B.A.C.  
 Boys & Girls Clubs of Annapolis & Anne  
 Arundel County Inc.  
 Boys & Girls Clubs of Metro Richmond  
 Boys & Girls Clubs of Southeast Virginia  
 Bridges to Housing Stability  
 Buzzards Bay Coalition, Inc.  
 By Their Side  
 Calvary United Methodist Church  
 The Calverton School  
 Camp St Charles  
 CARE  
 Caring Cupboard LLC  
 CASA of Anne Arundel County  
 Center for Science in the Public Interest  
 Center of Help, Inc.  
 Central Union Mission  
 Charting Careers, Inc.  
 Chesapeake Arts Center  
 Chesapeake Bay Foundation  
 Chesapeake Bay Trust  
 Chesapeake Cares Food Pantry  
 Chesapeake Charities  
 Chesapeake Legal Alliance  
 Chesapeake Region Accessible Boating  
 (C.R.A.B.)  
 Chesapeake Shakespeare Company  
 Theater  
 Child Builders  
 Child's Play  
 Christ Child Society of Annapolis  
 Christian Community Service Center  
 Christmas in April - Calvert County,  
 Inc.  
 Chrysalis House Inc.  
 The Citadel  
 Clemmons Food Pantry  
 Coastal Conservation Association of  
 Maryland  
 Colonial Players, Inc.  
 Columbia Festival of the Arts

Community Alliance of South County  
 Community Ecology Institute  
 Community Family Life Services  
 Community Foundation of Bloomington  
 and Monroe City, Inc.  
 Community Foundation of Howard  
 County  
 Compass Rose Theatre  
 The Complete Player Charity  
 Connecticut College  
 Convoy of Hope  
 Co-op Arundel, Inc.  
 Cornell Lab of Ornithology  
 Creating Communities  
 Creighton University  
 Cystic Fibrosis Foundation  
 Death with Dignity National Center  
 DeCesaris/Prout Cancer Foundation  
 Doctors Without Borders USA  
 Drink at the Well  
 Eastport United Methodist Church  
 Education Foundation of Anne Arundel  
 County Public Schools  
 Elmira College  
 Farming 4 Hunger  
 Feeding America  
 Ferndale Early Education Center  
 The Fletcher School  
 Foundation 4 Heroes  
 Fourth Presbyterian Church  
 Friends of the Jefferson Patterson Park  
 and Museum  
 Frostburg State University Foundation  
 Fund for Anne Arundel Endowment  
 George Cromwell Elementary School  
 Gesu School  
 Ginger Cove Foundation  
 Girls on the Run of the Greater  
 Chesapeake  
 Growth Action Network of Anne  
 Arundel County  
 Habitat for Humanity Metro Maryland  
 Habitat for Humanity of South  
 Hampton Roads  
 Habitat for Humanity of the Chesapeake  
 Habitat for Humanity of Wicomico  
 County  
 Habitat for Humanity Peninsula and  
 Greater Williamsburg  
 Harvest Resources in Anne Arundel Co.  
 Healing Art Missions  
 HeartSmart - The Cliff R.Roop Cardiac  
 Support and Education Foundation



Hellenic College Holy Cross Greek Orthodox School of Theology  
 Helping Up Mission  
 HELPS International  
 High Country News  
 Homes for America  
 HOPE For All  
 Hope House  
 Hospice Cup  
 Hospice of the Chesapeake  
 Howard Community College Educational Foundation, Inc.  
 Humane Society of the United States  
 Indian Creek School  
 International Chapter P.E.O. Sisterhood  
 International Rescue Committee, Inc.  
 International Society for Third-Sector Research  
 Jacob's Ladder Youth Foundation, Inc  
 Johns Hopkins University  
 Joy Reigns Lutheran Church  
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 The Leukemia & Lymphoma Society - Mid Atlantic  
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 Lighthouse ArtCenter  
 Limb Kind Foundation  
 Luminis Health Anne Arundel Medical Center  
 Luminis Health Anne Arundel Medical Center Foundation  
 Luminis Health Doctors Community Medical Center Foundation  
 MacArthur Middle School  
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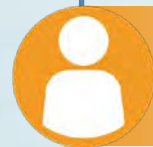
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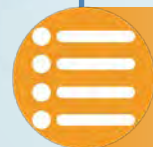
## Donate Through CFAAC



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See a List of Funds at [cfaac.org/funds](http://cfaac.org/funds)



Unrestricted



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Scholarship Fund



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Distribution Options



Endowed Funds

Gifts are invested and grants are distributed annually, supporting the cause in perpetuity.



Non-Endowed Funds

Grants are distributed at the donor's discretion.

**CONTACT OUR DEVELOPMENT TEAM AT 410.280.1102 FOR MORE INFORMATION ON HOW TO MAXIMIZE YOUR CHARITABLE GIVING.**



# INCLUSION. TOUGH TIMES DURING THE PANDEMIC HELPED OBI REEVALUATE AND EXPAND THEIR REACH.

When Marsha Legg became Chief Executive Officer of Opportunity Builders, Inc. (OBI), it was in the middle of the pandemic.

Tasked with not only keeping the doors open at the nonprofit that is dedicated to engaging individuals with disabilities in new opportunities, she also needed to make sure programming for OBI's clients remained on track so they could get back to work when the time came.

"It was a tough time," said Marsha. "We had to cross train people and transform practically every aspect of our operations. And, after Covid, we had to rely heavily on grants and generous donations to reopen the doors of our 41,000 square foot building."

OBI survived and even thrived after the pandemic. In fact, in 2021, the organization decided to revise their mission to expand their reach in the community, "to support youth and adults with disabilities to experience full inclusion in their communities as they learn, work, and pursue their paths to personal success."

Marsha explained, "We updated our mission as we recovered from Covid to serve youth—specifically high school students—as well as adults. We also expanded it to include all disabilities, not only developmental and intellectual, but also behavioral health, mental health, and physical disabilities."

Being new to the organization and to Anne Arundel County, Marsha relied on the Community Foundation's Community Needs Assessment: *Poverty Amongst Plenty, VII*, to inform her and the organization's leaders about the needs in the community.

"One of the most useful things for us is the Community Needs Assessment report," said Marsha. "It's a powerful document. The data has helped us to understand what people need in different neighborhoods. I can't tell you how nice it is to have something consolidated in that format."

## HOWEVER, CFAAC'S RELATIONSHIP WITH OBI GOES BEYOND THE USEFULNESS OF THE DATA-PACKED COMMUNITY NEEDS ASSESSMENT REPORT.

The nonprofit had opened an Agency Endowment Fund with the Community Foundation in 2019 to ensure the organization's sustainability and broaden OBI's awareness in the community.

OBI Board President Bill Kuethe recalled, "Many of us on OBI's board were aware of the Community Foundation since its inception. So, when Vicki Callahan [OBI's CEO at the time] approached us about opening an endowment fund at the Community Foundation, we liked the idea and thought that it was an opportunity for more exposure in the community."

"And of course, the Community Foundation is such a well-respected organization, we like having the partnership," he added. "We knew the fund would be well-managed by a professional organization with a great reputation in the community. We thought it would deliver additional exposure for us as well as provide us assistance in managing an endowment fund."



Photo courtesy of OBI





# SPEAKER SERIES EVENTS

Every year, CFAAC provides the community with events that cover a wide-range of topics to connect others with ideas and skills to strengthen our county.

## COMMUNITY IMPACT SPEAKER SERIES

### **Understanding the Urgency for—and Hope around—Restorative Practices in Anne Arundel County Public Schools**

**Presenter:** Kathryn B. Rockefeller, J.D., Anne Arundel County Public School Climate Specialist

### **Meet Our County’s Equity, Diversity, and Inclusion Team and Learn How to Apply the Equity Lens at Your Workplace**

**Presenters:** Pete Hill, Anne Arundel County Director of Equity, Diversity, and Inclusion, and Asha Smith, Anne Arundel County’s Equal Opportunity and Human Relations Officer

### **Strategic Leadership for Nonprofit Leaders**

**Presenter:** Joann Vaughan, Former Executive Director at Maryland Federation of Art

*Co-hosted with the Junior League of Annapolis, Inc.*

### **Fundraising: How to Make the Ask and Why You Should**

**Presenter:** Liz Farr, Senior V.P. & Independent Schools Practice Leader, Grenzebach Glier and Associates

*Co-hosted with the Junior League of Annapolis, Inc.*

### **Back to School with Trauma in Mind: A Community Conversation**

**Presenter:** Pamela Brown, Ph.D., Executive Director, Anne Arundel County Partnership for Children, Youth and Families

### **Diversity, Equity, Inclusion, and Belonging 101: A Career and Life Primer**

**Presenter:** Karen Bond, Director Of Strategic Partnerships, University of Maryland, The Judge Alexander Williams Policy Center

*Co-hosted with the Junior League of Annapolis, Inc.*

### **brainSHIFT for Women Leaders: Brain Science of Beating Burnout**

**Presenter:** Dr. Romila “Romie” Mushtaq, M.D., Neurologist and Chief Wellness Officer of Evolution Hospitality

*Co-hosted with the Junior League of Annapolis, Inc.*

### **Girls on the Brink—Raising Emotionally Healthy Girls: An Evening of Conversation with Author Donna Jackson-Nakazawa**

**Presenter:** Donna Jackson-Nakazawa, Author

**Interviewer:** Dr. Faith Hackett, Severna Park Pediatrician





## ANNA E. GREENBERG BOARD LEADERSHIP EVENT

### The Board's Role in Organizational Resilience

**Presenters:** Eliot Pfanstiehl, Retired Founder and CEO Emeritus of Strathmore Hall Foundation, Inc., and Monica Jeffries Hazangeles, President and CEO of the Strathmore Hall Foundation



## PLANNED GIVING SPEAKER SERIES

### LGBTQ Estate Planning Webinar

**Presenter:** Lee Carpenter, Attorney with Niles, Barton & Wilmer

### Make a Will Seminar

**Presenter:** Rosemary Calderalo, 21/64 Certified Advisor

### Women's Edition: How to Go From Overwhelmed to Empowered Through Estate Planning

**Presenter:** Attorney Elsa W. Smith, Founder and Principal of the Law Offices of Elsa W. Smith, LLC



## COMMUNITY NEEDS ASSESSMENT PRESENTATION OF *POVERTY AMIDST PLENTY VII: MOVING FORWARD TOGETHER*

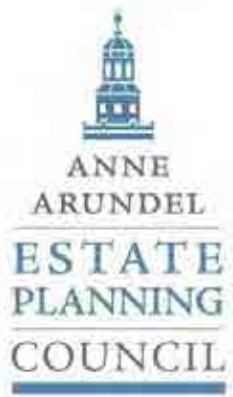
Learn more about the Community Needs Assessment Report on page 11.

**Presenter:** Pamela Brown, Ph.D., Poverty Amidst Plenty VII Author and Executive Director, Anne Arundel County Partnership for Children, Youth and Families



**LEARN MORE ABOUT OUR  
2023 SPEAKER SERIES EVENTS AT  
[WWW.CFAAC.ORG/EVENTS-CALENDAR.HTML](http://WWW.CFAAC.ORG/EVENTS-CALENDAR.HTML)**





## 2022 ANNE ARUNDEL ESTATE PLANNING COUNCIL

The mission of the Anne Arundel Estate Planning Council (AAEPC) is to provide opportunities for wealth planning professionals from various disciplines to interact, share ideas, and build relationships that will allow them to better serve their clients and the community. The Council provides quarterly education programs and networking events for professional advisors. The AAEPC continues to grow with the financial support of its members and sponsors.

To learn more about AAEPC visit: [www.aestateplanning.org](http://www.aestateplanning.org).

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CFAAC assists donors in achieving their philanthropic goals through the creation of new funds and through increased contributions to existing funds; reflecting our goal of connecting people who care to contribute to causes that matter. Donors have the ability to make gifts to CFAAC using a variety of assets including cash, appreciated stock, and life insurance, and receive the maximum allowable tax advantage.

### CHECK

Please make your check payable to the Community Foundation of Anne Arundel County, and include the name of the fund to which you are donating on the memo line.

**Mail your check to:**

Community Foundation of Anne Arundel County  
900 Bestgate Road, Suite 400, Annapolis, MD 21401

### CREDIT CARD

You can make a single or recurring gift to any of CFAAC's funds by making a secure credit card donation online at [cfaac.org](http://cfaac.org) or calling CFAAC at 410.280.1102.

### WIRE TRANSFER

To make a wire transfer, please contact our Director of Finance and Operations, Kathy Luthcke, at [kathy@cfaac.org](mailto:kathy@cfaac.org) or call 410.280.1102 ext. 105.

### DONATE STOCK

Donating appreciated stock can reduce donors' capital gains while supporting the causes that matter to them. To make a donation of stock, please contact our Director of Finance and Operations, Kathy Luthcke, at [kathy@cfaac.org](mailto:kathy@cfaac.org) or call 410.280.1102 ext. 105.

### IRA CHARITABLE ROLLOVER

If you are 70 ½ or older, the Charitable IRA Rollover provides a unique opportunity to use retirement plan assets to make a meaningful gift to a qualified nonprofit organization without receiving taxable income on the withdrawal. Contact our Director of Planned Giving, John Rodenhausen, at [john@cfaac.org](mailto:john@cfaac.org) or call 410.280.1102, ext. 103.



## LEAVE A LEGACY

Partnering with CFAAC will ensure the causes that matter to you will be supported for future generations. There are many ways to make a planned gift to CFAAC: Bequests, Charitable Remainder Trusts, Charitable Lead Trusts, Life Insurance, Retirement Plans, and more. Contact our Director of Planned Giving, John Rodenhause, at [john@cfaac.org](mailto:john@cfaac.org) or call 410.280.1102, ext. 103.

## ENDOW MARYLAND

A Maryland state tax credit called “Endow Maryland” rewards donors who help build permanent charitable funds for local communities across the state and in Anne Arundel County. Endow Maryland allows donors to establish or add to an existing endowed fund at CFAAC and qualify for a 25% state tax credit. CFAAC has a limited number of tax credits available, so donate today. Contact our Director of Finance and Operations, Kathy Luthcke, at [kathy@cfaac.org](mailto:kathy@cfaac.org) or call 410.280.1102 ext. 105.

## CHARITABLE PARTNERS PROGRAM

CFAAC recognizes that the pooling of invested assets reduces administrative and investment-related expenses, allowing more money to go toward benefiting the social sector. A donor may wish to recommend that their contributed assets be invested outside of our pooled investments. For this reason, we have established certain guidelines, called the Charitable Partners Program (formerly the Medallion Program), for when a donor wishes to recommend a specific investment manager or management firm to manage their donated assets. Contact our Director of Finance and Operations, Kathy Luthcke, at [kathy@cfaac.org](mailto:kathy@cfaac.org) or call 410.280.1102 ext. 105 for more information.

## OPEN A FUND

Opening a fund at CFAAC is like having your own private foundation, only without the hassle and expense. CFAAC staff researches each nonprofit you'd like to support to ensure it is in good standing and then issues the check from your fund. For more information on opening a fund contact our Director of Development, Damika Baker-Wilson, at [damika@cfaac.org](mailto:damika@cfaac.org) or 410.280.1102 ext. 102.





## ABOUT CFAAC

At CFAAC we know that every ONE of us makes a difference. That is why we are focused on growing philanthropy one person, one family, one business at a time. The more of us who give, the more good we can do for our community, together.

## OUR VISION

We envision a vibrant and generous community that comes together to enhance the quality of life for all.

## OUR MISSION

Our mission is to inspire and promote giving in Anne Arundel County by connecting people who care with causes that matter.

## OUR ROLE

CFAAC's role is to promote philanthropy, help to identify critical needs in Anne Arundel County, partner with donors to help them meet their philanthropic and financial goals, and promote collaboration to help strengthen local nonprofits.

Community Foundation of Anne Arundel County

900 Bestgate Road, Suite 400

Annapolis, MD 21401

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