

# SHELTER ISLAND



## EDUCATIONAL FOUNDATION, INC.

### ANNUAL REPORT · AUGUST 31, 2009

The purpose of the Shelter Island Educational Foundation is to pursue, create and provide excellent educational opportunities that enhance, inspire and broaden the horizons of our children and the community.

The Foundation seeks to go beyond the boundaries of local school district budgetary obligations and geographic isolation, augmenting the resources of individual teachers, family and community, and nourishing our unique island heritage.

## A MESSAGE FROM OUR PRESIDENT

In what has proven to be a very challenging year for not-for-profit organizations and our country as a whole, the Shelter Island Educational Foundation has continued to provide excellent educational opportunities to the children of Shelter Island. While revenues have dropped significantly, we must count ourselves fortunate that our donors continue to be willing to help us to maintain programs and expand the horizons of our students.

We are working hard to improve our fundraising efforts while searching for new and exciting programs to offer. We have created a new website, [www.shelterislandfoundation.org](http://www.shelterislandfoundation.org). On the website, to which we add new content regularly, you can now download grant applications, view photos of students participating in programs, and even make a donation.

In the past year, we have been able to continue to offer two grant cycles, one in the fall and one in the spring. This allows students to attend, an institutions to offer, programs throughout the year.

This year, individual and institutional grant awards totaled \$12,249. In addition, \$26,888 was awarded in gifts designated by their donors. In all, the Foundation distributed \$39,137 in awards this fiscal year. In these difficult times, this is a significant accomplishment on our little island.

The Foundation's assets as of August 31, 2009 are \$295,553. Of this, \$41,758 is unrestricted, \$84,898 is temporarily restricted (with \$33,735 designated towards specific projects and \$51,163 representing accumulated interest and dividends) and \$168,896 is permanently restricted.

The Harman Hawkins Educational Endowment Fund, a segregated perpetual fund, has a historical cost of \$168,896 and a fair market value of \$208,088.

Contributions, net proceeds of special events, interest and dividends for the fiscal year ending August 31, 2009 were \$45,199. General administrative expenses totaled \$8,025. Fundraising expenses, including the cost of special events, totaled \$6,209.

The Foundation has been working to provide excellent educational opportunities for twelve years. With the help of our wonderful island community we are committed to continuing this tradition and we strive to get better every year.



Phil DiOrio  
*President*

“A PARTNERSHIP OF  
CHALLENGING GOALS,  
INSPIRED LEARNERS,  
AND VISIONARY GIVING”



*A Message from*

# Sharon Clifford

## School Superintendent

The Shelter Island Educational Foundation is a valued partner in the education of our students at the Shelter Island School. Each year the Foundation provides educational opportunities for students and teachers that might not be available without the support and generosity of the community members who provide donations to the Shelter Island Educational Foundation. Last year, for example, our students were able to attend a character education program called "ROPES" and participate in a leadership conference in Washington D.C. Once again, the Educational Foundation supported the "Young Playwrights" program through Stony Brook University. In addition to the items I have highlighted, the Foundation provides individual grants to students and teachers for a variety of enriching activities.

We'd like to thank the Shelter Island Educational Foundation for their continued support. Many young people benefit from the generosity of those who support the Foundation. Their breadth of experiences is broadened, positively impacting their education. Many students come away from these programs and travel opportunities thinking about possibilities for their future.

We look forward to our continued partnership with the Shelter Island Educational Foundation in the coming years.

# SUMMARY OF 2009 GRANT AWARDS



The Foundation's individual grant awards are made to resident students of Shelter Island who wish to attend an educational program. In addition, institutional grant awards are made to institutions that offer programs that fit the guidelines of our mission.

The Foundation also has a designated gift program. Designated gifts are independently identified and supported by the commitment of generous community members.

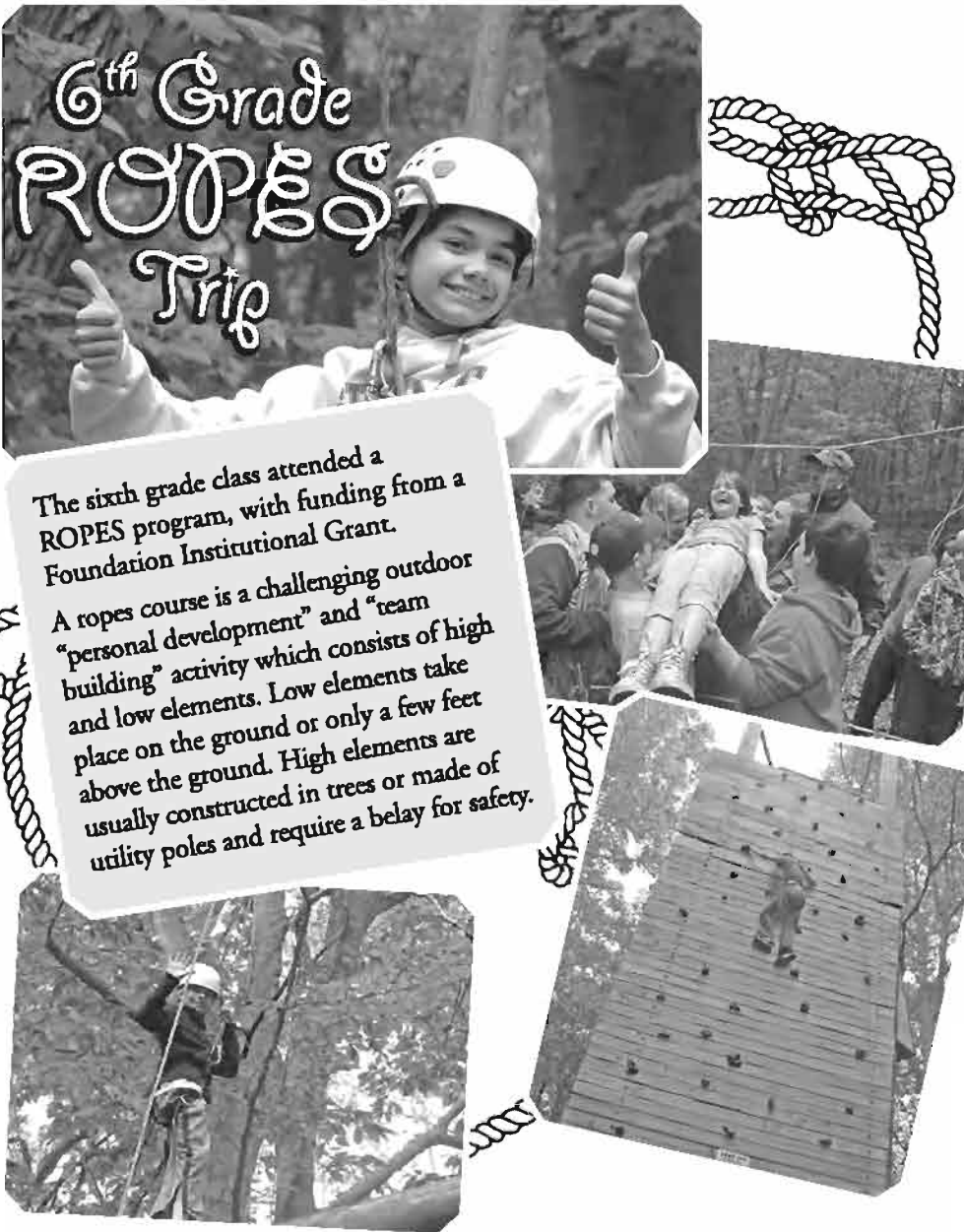
Highlights of this year's two grant cycles, through which over \$12,000 was awarded, are as follows:

## INDIVIDUAL AWARDS

- Awards to two students to attend leadership forums in Washington, D.C.
- Award to one student to attend a World Student Ambassadors' Forum "Iconic European Capitals" in Europe
- Award to one student to attend a Biotechnology Summer Camp at Stony Brook University

## INSTITUTIONAL AWARDS

- **The Retreat** for violence prevention/education programs at the Shelter Island School
- **Shelter Island Library** for the Intergenerational Literacy Program 2Rs4fun! and a series of summer workshops dedicated to art education for children
- **Shelter Island School** for a 4th and 5th grade trip to Old Bethpage Village for the History Alive program, and a trip for the 6th grade to participate in a ROPES program
- **Communities That Care of Shelter Island** to support education and mentoring for community drug prevention programs
- **Shelter Island Brownies, Junior Girl Scouts and Cadets** to participate in a trip to visit historical landmarks in New York City.



The sixth grade class attended a ROPES program, with funding from a Foundation Institutional Grant.

A ropes course is a challenging outdoor "personal development" and "team building" activity which consists of high and low elements. Low elements take place on the ground or only a few feet above the ground. High elements are usually constructed in trees or made of utility poles and require a belay for safety.

## Peconic Bay Science Program

In its second year, the Peconic Bay Science Program welcomed 10 students in 4th-6th grade for a week of summer learning. The program is an interactive marine ecology, local maritime history and boating safety course. The program, designed by science teacher Robert Jester and Captain David Berson, is offered by the East End Maritime Institute.

Students participated in maritime exercises, learning about the use of a compass and nautical charts. They took samples for water testing, checking the health of the bays around us. They also used a plankton net to collect microorganisms from the bay. With the use of magnifying boxes, they identified the types of plankton they netted.

The Foundation is proud to be involved with a program that combines scientific learning with practical, local applications that create an appreciation for the beautiful ecosystem in which we live.

## Summer Fest

This summer, the Shelter Island community once again came together to help raise money for the programs the Foundation funds. Summerfest began with dinners hosted by the Ram's Head Inn, Darrin and Susan Binder, Sam and Stephanie Lebowitz, and Chris Mulligan and Sarah Sherwood.

After dinner, the revelers attended a barn party at the home of Joe Lauro and Karen Edwards. There was dancing to the Moondogs and desserts provided by the members of the Foundation Board of Directors. Joanne Calabro put together a wonderful array of prizes for the raffle. This event raised close to \$7,000 this year.

The Foundation wishes to thank those who hosted dinners and the barn party, as well as those who attended, for making this a special night.

# THE OCEAN CLASSROOM

Along with 7th graders from Fisher's Island and Block Island, 31 Shelter Island students boarded the schooners Harvey Gamage and the Spirit of Massachusetts for the annual "Island Kids" program. This continues to be an outstanding educational experience for all involved.

Students are responsible for keeping the boats shipshape, hauling sails and maintaining night watches. They learn what is required to sail a schooner and all the teamwork and responsibility that are involved. They also learn what life is like for the kids from the other islands.

This trip continues to challenge kids to push their limits, building confidence and self-esteem along the way. The Foundation is proud to partner with the school and parents to provide this exciting trip.



*Photo above: Ocean Classroom kids*



Thanks to the generosity of the Shelter Island Yacht Club and many of its members, the Shelter Island School has its first sailing club. Yacht Club members made designated gifts to the Foundation to support the start-up costs of this program, and the Yacht Club provided the boats and the facilities needed to make this long time dream a reality.

The sailing club races in the spring and fall, with meets taking place up and down the eastern seaboard.

The Foundation would like to thank the Yacht Club and its membership for making this program happen. The Yacht Club and its members have supported the Foundation and many of its programs since its inception.



## *Career Conversations*

This program, founded by Emeritus Board member Linda Kofmehl, continued to provide opportunities to students wanting to learn more about specific professions they might be interested in pursuing. This fiscal year we were able to provide two Career Conversations.

The first was in graphic art and design. Local professionals talked with interested students about the many ways a career in graphic arts and design can be realized.

The second involved careers in the maritime/marine industry. Professional captains with decades of experience discussed with students the possibilities of a career on the water.

We are looking forward to this program continuing and growing as we help students become aware of the incredibly successful human resources we have here on Shelter Island.

## YOUNG PLAYWRIGHTS PROGRAM

The Young Playwrights program continues to be one of the most beloved programs we sponsor. This year, the program moved to the SUNY Stony Brook Southampton campus, but remained under the direction of Emma Walton and Will Chandler.

Thirty-five students from the seventh grade were taught the creative process of writing a one scene play, going from ideas that began as small sparks to a finished product with many revisions along the way.

Upon completion, the plays were judged and two plays from the Shelter Island School were chosen for production at the Southampton campus. The plays chosen were *Violet in Greece*, by Tom Fay and *Big Decisions*, by Samantha Capello.

*Violet in Greece* was directed by Tom Fay, assisted by Taylor Sherman. It starred \_\_\_\_\_ and Matthew Murphy.

*Big Decisions* was directed by Samantha Capello, assisted by \_\_\_\_\_. It starred Drew Garrison and Rowan Hausman.

Shelter Island students also had the opportunity to work backstage in all aspects of production.

The Foundation is pleased to continue sponsorship of this program which stimulates the creative mind and promotes teamwork in a collaborative learning process.

## THE NUTCRACKER TRIP

Through the continued generosity of Barbara Horgan and Linda Kofmehl, the 8th grade class from the Shelter Island School was once again able to attend a performance of Tchaikovsky's *The Nutcracker Suite* at Lincoln Center. Every year students watch in awe as they see how the choreography, set design and costumes come together to create what is truly a wonderful holiday spectacle. This trip combines education and culture, with students learning what it takes to put on a production of this quality. The Foundation is happy to continue offering this wonderful opportunity.

## PHANTOM OF THE OPERA ON BROADWAY

Each year, through a designated gift, students who have given their all in music by participating in the North Fork Music Festival and the Suffolk County Music Educators Concerts have had the opportunity to attend a Broadway musical. This year the students were able to attend the classic *Phantom of the Opera*. This is a wonderful way for the students to see their efforts rewarded and be exposed to musical theater at its highest level.



## 2Rs4fun!

This exciting new program, an Intergenerational Literacy Program, was funded, with other sponsors, twice during the past year, once through a designated gift and once through an institutional grant award.

This program pairs adult mentors with professional writing experience one-on-one with students in order to help promote and develop literacy and creative writing skills outside the classroom environment.

There were no rules or boundaries on how young

writers could exercise their writing abilities, whether in prose or poetry, fact or fiction, reality or imagination.

We would like to thank Mary Dwyer for creating this program and for her dedication to seeing her vision come to fruition. Programs that pair adult community members and students help bridge the gap between generations and expose kids to role models they might never encounter otherwise.

The Foundation is very happy to be a part of this new program.

# D O N O R S

SEPTEMBER 1, 2008 – AUGUST 31, 2009

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## Major \$1,000 to \$4,999

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## Ways to Give

Gifts to the Foundation can be made in a variety of ways that offer personal financial planning advantages; including income tax charitable deductions; reduction in capital gains taxes and estate tax benefits.

**Gifts of Cash:** contributions are tax-deductible and may qualify for corporate matching gifts.

**Gifts of Securities:** the Foundation maintains a brokerage account to accept gifts of securities held either in the owner's name or in: "street name".

**Planned Gifts or Bequests:** The Foundation can be included in a will (or other estate planning instrument) either at the time the will is drawn up or as a later codicil or amendment.

**Life Insurance:** the Foundation can be named beneficiary on most types of life insurance policies.

**In Memoriam:** gifts may be made to offer sympathy or pay tribute to a deceased individual.

**In Recognition:** contributions to honor a former teacher, administrator, alumni class, friend or family member.

**Designated Gift:** a gift may be given for a specific project, with Foundation approval.

## Matching Gifts

Many companies support educational institutions through matching gift programs. You are encouraged to investigate your employer's policy on matching funds.

*Copies of the Shelter Island Educational Foundation, Inc. financial statements are available by request to the Foundation at: PO Box 1950, Shelter Island, NY 11964-1950.*



SHELTER ISLAND EDUCATIONAL FOUNDATION, INC.  
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