

2010 Annual Report



FOUNDATION FOR METROWEST

The cities and towns of MetroWest are a magnet for families. Whether moving from Boston to take advantage of tightly-knit communities, strong school systems, and a suburban life style, or emigrating from countries abroad in search of new opportunities, MetroWest has much to offer. The region is rich in history, abundant in natural beauty, and imbued with a strong tradition of philanthropy and civic engagement on the part of its citizens. From the time of the first settlements in the 1700s, the people of MetroWest have given generously to support libraries, schools, and cultural institutions; to protect and preserve the natural environment; and to help those in need. In doing so, they have given us a great gift: wonderful communities in which to live and raise our families, where we can feel safe and at home.

It is now our responsibility to continue this tradition, and to do what we can to support our community for future generations. In a world filled with complex and challenging issues, it is easy to overlook the problems we face in our own backyard and to direct our philanthropic resources elsewhere. Indeed, as a global community, it is important that we do so. But we must not forget the challenges at home. Homelessness and hunger; rising costs for education, healthcare, and housing; and threats to our rivers, lakes, land, and wildlife are ever present and ever growing.

As the community foundation for MetroWest, the Foundation is committed to addressing these issues throughout the region. It is our responsibility to make those of us who live in these communities aware of the needs and challenges that exist among us, and to facilitate the philanthropic process for individuals and families who wish to help.

This past year has been a busy one for the Foundation. We launched a new education fund with a forum on Science, Technology, Engineering, and Math (STEM) education which featured Paul Reville, the Massachusetts Secretary of Education, granted \$575,000 to local organizations, and worked to build the capacity of organizations throughout the region by offering a series of skills trainings and board development events. Making an impact with more than just funds is not just a goal, but how we think and act each and every day.

We stand ready to assist you by connecting you to organizations working for causes you care about, by helping you to teach your children the value of civic involvement, and by guiding you through the philanthropic process as you plan your own legacy.

We are honored to be your partner in philanthropy and look forward to working together in the years to come.

Sincerely,



Kenneth Vona
Chair, Board of Trustees



Judith Salerno
Executive Director

The Needs of MetroWest

Commuting home from the City of Boston on Route 9, 90, or 93, many people believe they are leaving the troubles of an urban environment behind. Those same people are often surprised to find out that their towns are homes to food pantries, the unemployed, and underemployed – many of whom are at risk of hunger, homelessness, and domestic violence.

Poverty has no geographic boundaries in Massachusetts and recent studies by the Brookings Institution and data compiled by the Foundation for MetroWest have shown what many of us have known for some time – poverty is not just an urban issue. The challenges that families living in poverty face are an issue that the entire Commonwealth of Massachusetts must address, but suburban communities and their nonprofits are now facing a unique set of challenges.

A few statistics:

- 13,435 school-aged children in MetroWest are low-income – 12% of the total school population.
- One-in-four students in the region have a learning disability.
- While they have not increased, unemployment rates have been stagnant in the region for more than a year.
- The population of people over 60 in MetroWest is growing faster than the state average. By 2020, it is projected to be 24.6% greater than in 2000.

These are just a few findings from the Foundation's recent needs assessment. Throughout 2010, the Foundation worked with a consulting team to develop a set of indicators that measure, monitor, and express the needs existing in the region. On our website you can find the results of our work and will see information on a variety of issues including poverty, seniors, youth risk behaviors, and immigrants.

This data is just the beginning of a long-term project, which we plan to use to help better tell the story of the region to potential funders, educate board and committee members, and provide as a resource to the community. To learn more, including how you can get more involved, please contact the Foundation.

Funds of the Foundation (as of December 31, 2010)

Donor Advised Funds

Provide grants based on regular advice by the donors.

Anson-Bass-Charron Fund
Herbert and Esther Atkinson Fund
Carls Fund
Ciesielski Fund
Cohen-Gertz Family Fund
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DJ's Field Fund
Dover Church Youth Fund
English Family Fund
Jacqueline Gannon Fund
Michael Gannon Fund
Sean Gannon Fund
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The Julia Fund
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Kaiyana Fund
James Jay Lavoie Memorial Fund
The Lillian Fund
Kelly McClintock and
Bonnie Mineo Fund
Mugford Family Fund
Karen Owczarek Memorial Fund
Pike Family Fund
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Michelle and Richard Rosmarin Fund
Sherborn Fund
Gillian Tara Shor Fund
Nathalie and John Thompson
Family Fund
The Thompson Fund
The Tower Fund
Trustees and Advisors Fund

Designated Funds

Support specified agencies and programs.

ANP Blackstone Restoration Fund
Ashland Town Emergency Fund
Concord Common Weal Fund
Forever Fund
Framingham Adult ESL PLUS Fund
Maynard Education Foundation Fund

Giving Area Funds

Support discretionary grants to organizations in named areas.

MetroWest Fund for Arts & Culture
MetroWest Fund for Education
MetroWest Fund for the Environment
MetroWest Fund for Family Support
MetroWest Fund for Youth Development

Field of Interest Funds

Support a variety of agencies and programs with the goal of addressing specific concerns.

Deborah Blumer Fund for
Civic Engagement
Foundation for MetroWest Youth in
Philanthropy Endowment Fund
Jackson Youth and Community Fund
Metrowest Watershed Preservation Fund
Nyanza Fund
Path in the Woods Fund
Ernestine and Josephine Sigmund Fund
Sudbury Sportsman's Fund
Mary J. Vrabel Fund
The Fund for Wellesley
Wilson Family Fund

Scholarship Funds

Support MetroWest students continuing their education.

Lewis Clapp Memorial Fund
Charles and Virginia Millett Gately
Scholarship Fund
Edward L. Riley Memorial
Scholarship Fund
Mary June Nylander Souza
Scholarship Fund
Technology Leadership Legacy
Scholarship Fund
Tiberio Natick High School Fund

Nonprofit Agency Funds

Support the operations and programs of specific agencies.

ACS Fund for the Future
Bridge of Central Massachusetts Fund
Charles River Center Endowment Fund
Community Therapeutic Day School
Endowment Fund
Danforth Museum of Art Fund
Discovery Museums Fund
Framingham Adult ESL Program Fund
Garden in the Woods Fund
Land's Sake Endowment Fund
Learning Center for Deaf Children Fund
Maynard Community Chest Endowment
Fund
Medway Foundation for Education Fund
MetroWest YMCA Fund
Mildred B. Turenne Framingham Civic
League Fund
United Way of Tri-County Fund

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2010 Gifts to Funds

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Ms. Margaret A. Ramsey and
Mr. John M. McCluskey
The Rands Foundation
Mr. and Mrs. Kenneth Vona

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Mr. Stan Ciesielski

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Framingham Adult ESL PLUS Fund

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Citigroup Payment Services
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Diatelevi
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1795

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Medway Foundation for Education

Medway Foundation for
Education
Patriot Real Estate Inc.

MetroWest Fund for Families

Mr. and Mrs. Tobey Choate
Mr. and Mrs. Anthony
Salerno

MetroWest Fund for Education

Mr. Richard Greene

MetroWest Fund for the Environment

Mr. and Mrs. Anthony
Salerno

Path in the Woods Fund

The Path in the Woods
Foundation

Sarah Clayes House

Col. and Mrs. Bruce D.
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The Fund for Wellesley

Ms. Marlene Allen
Ms. Angelika E. Angino
Dr. Heidi Angle and
Mr. Richard Angle
Ms. Amy Axelrod and
Mr. Jeff Struzenski
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Mr. Brian Moynihan
Mr. and Mrs. Steven Buller
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Mr. and Mrs. Arthur Eisenberg
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 Mr. and Mrs. Arthur Brisbane
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 Ms. Deb Shapiro and Ms. Lisa Weissmann
 Mr. and Mrs. Richard Vancil

Event Sponsorships

Middlesex Savings Bank
 Charitable Foundation

2010 Grants

The Foundation awards discretionary grants through an open, competitive process reviewed and selected by the Distribution Committee. Any 501(c)(3) nonprofit organization which meets the Foundation guidelines may submit a proposal. Participants in the Youth in Philanthropy program recommend the youth and community grant recipients.

Family Support Grants

- Advocates, Inc., \$5,000** *To fund the Advocacy, Benefits, & Legal Services staff person at their Outpatient Clinic in Marlborough, MA.*
- A Place to Turn, \$5,000** *To support the "Eat Fresh" initiative which provides nutrition-rich food in the emergency food pantry*
- Communities for Restorative Justice, \$5,000** *To prepare and present a protocol to respond to cyber-bullying in middle and high schools.*
- Cooperative Elder Services, Inc., \$5,000** *To provide temporary financial assistance to elders in need of immediate health care services.*
- Employment Options, Inc., \$5,000** *To fund a Parent Peer Specialist to provide support and services for parents with mental illness.*
- Framingham Adult ESL Program Fund, \$4,500** *To fund an evening Citizenship Preparation class.*
- Framingham Court Mediation Services, \$2,000** *To provide trained volunteer mediators for all small claims sessions in MetroWest courts.*
- Greater Waltham Arc, \$5,000** *For a community-based pilot program providing respite time for families and caregivers of individuals with disabilities.*
- Household Goods Recycling of Massachusetts, \$5,000** *To procure a consistent supply of mattresses/box springs and dining tables from regional warehouses.*
- MetroWest Outreach Connection Inc., \$2,500** *To assist low-income families and individuals at risk of losing their homes and those seeking permanent housing.*
- Natick Service Council, Inc., \$5,000** *To provide behavioral health evaluation and treatment to low-income residents who exhibit symptoms of untreated depression, anxiety, and alcohol disorders.*
- REACH Beyond Domestic Violence, \$5,000** *For their work preventing domestic violence through REACH's Community Based Prevention and Advocacy Program.*
- WATCH, Inc., \$5,000** *For the Breaking Barriers program offering English classes and tutoring, resource connection, and leadership development to low-income immigrants.*

continued next page

Wayside Youth & Family Support Network, \$2,000 *To fund the position of a part-time Career Specialist at the Tempo Young Adult Resource Center.*

Arts & Culture Grants

Commonwealth Ballet Company, Inc., \$2,500 *To aid in funding performances of a dance concert entitled "A Small Thing, Lost."*

Danforth Museum of Art, \$2,500 *To fund "First Sunday Drop into Art" events providing free admission, gallery activities, and creative studio workshops.*

The Discovery Museums, \$3,000 *To fund collaborations with the Deaf and Hard of Hearing Program at Children's Hospital in Waltham and the Autism Alliance of MetroWest.*

Drinking Gourd Project, \$2,000 *To install and engrave stone benches in Walden Woods to mark the location of the home sites of former slaves.*

Enter Stage Left Theater, \$5,200 *To support the first year of a part-time administrative assistant.*

Framingham History Center, \$2,500 *To support a Leadership Challenge grant.*

Hudson Area Arts Alliance, \$4,000 *To support the development and implementation of a strategic plan.*

Reagle Players, \$2,500 *To support their "It's Christmas Time" show.*

The Center for Arts in Natick, \$3,000 *To expand programming to include presentations of feature, family, and independent films from local and national filmmakers.*

Environmental Grants

Gore Place Society, \$5,000 *To create self-guided, multi-media outdoor tours at Gore Place.*

Land's Sake, \$5,000 *To convene MetroWest organizations and individuals to build relationships and develop specific programs to engage youth in environmental education.*

Massachusetts Audubon Society, \$3,100 *To fund the ALLIES program at Stapleton Elementary School in Framingham.*

Organization for the Assabet River, \$5,000 *To engage new communities and rebrand OAR to reflect the addition of the Sudbury and Concord rivers to OAR's mission.*

Youth & Community Grants

Big Brothers Big Sisters of MetroWest, \$2,500 *To support mentoring programs for MetroWest youth.*

Birthday Wishes, Inc, \$1,500 *To fund birthday parties for homeless children in shelters.*

Boys and Girls Clubs of Metrowest, Inc, \$2,000 *To expand the Torch and Keystone Clubs - teen leadership programs.*

Chesterbrook Community Foundation, \$5,000 *For operating and capacity building expenses.*

Children's Charter, \$1,750 *To train new foster families to help behaviorally challenging children.*

Decibels Foundation, \$1,000 *To fund the development and implementation of a workshop on "Unilateral Hearing Loss in Children."*

Easter Seals Massachusetts, \$3,000 *To support a summer camp leadership program which integrates youth with and without disabilities.*

Esperanza Academy, \$1,000 *To further develop and implement the theater program to give all girls the opportunity to participate.*

Gaining Ground, Inc, \$500 *To purchase equipment and supplies for the maple syrup 'finishing' process in the new Sugar House.*

Greater Waltham ARC, \$2,500 *For the School to Work Transitions Program for middle and high school students with developmental disabilities.*

Greyhound Friends, \$500 *To help with medical expenses for incoming greyhounds that are rescued from racing.*

Growing Places Garden Project, \$1,500 *To enroll families in the raised bed garden program.*

John Andrew Mazie Memorial Foundation, \$1,750 *To support a greater number of students participating in the program.*

Minute Man ARC for Human Services, \$2,500 *To support programs that help people with developmental and intellectual disabilities.*

More Than Words, \$5,000 *To support the Transitions Program.*

National Center on Family Homelessness, \$2,000 *To support shelters in the MetroWest area.*

Open Table, Inc., \$500 *To fund the 'Kid's Bags' program providing families with healthy, nutritious food items school lunch.*

Operation Outreach – USA, \$1,000 *To provide literacy and character education program to students at Avery Elementary school in Dedham.*

Parmenter VNA & Community Care, \$1,100 *To support the Heart Play Program.*

Partners in Health, \$2,000 *For Haitian Earthquake Relief*

Resiliency for Life, \$7,000 *To support their Academic Intervention program.*

Samaritans Inc., \$3,000 *To allow youth leaders to deliver 24-hour Befriending services and train MetroWest community members to identify and intervene with young people at risk for suicide.*

SquashBusters, \$1,500 *To support the summer component of their educational after-school program.*

The Community School, Inc, \$3,000 *To help defray the costs of preschool care for several children in need at the school.*

The Michael Carter Lisnow Respite Center, \$3,500 To support a scholarship fund for respite care for low income children with significant disabilities.

Grants from Donor Advised Funds

A Place to Turn
Acton Food Pantry
Adolescent Consultation Services
Advocates, Inc.
Ashland Emergency Fund
Assabet Valley Little League
Babson College
Bear Creek Elementary School
Boston Harbor Island Alliance
Boston University - WBUR 90.9
Celebration International Church Food Pantry
Chabad Center of Natick, Inc.
Chapel Hill - Chauncy Hall School
Charles River ARC
Charles River Watershed Association
City of Marlborough Emergency Support
Community Therapeutic Day School
Congregation Dorshei Tzedek
Cornerstone Forum of the Pilgrim Church
Daily Bread Food Pantry
Danforth Museum of Art
Dedham Food Pantry
First Parish Wayland
Foundation for MetroWest
Framingham Adult ESL Program Fund
Framingham High School
Friends of the Milford Upper Charles Trail
Gaining Ground, Inc.
Grandma's Pantry
Grassroot Soccer
Greyhound Friends
Heifer Project International, Inc.
Holliston Pantry Shelf
HOPE Worldwide New England, Inc.
Hudson Food Pantry
Impact on Education
J.F. & C.S. Family Table
Jewish Family Service of Metrowest
Land's Sake
Lexington Food Pantry
Loaves & Fishes
Lucy & Joe's Food Pantry for Frail Elders
Lucy MacKenzie Humane Society
Marlborough Community Services, Inc.
Maynard Food Pantry
Medfield Food Cupboard
Medway Food Pantry / Medway Housing Authority
Medway Village Food Pantry
MetroWest Interfaith Hospitality Network

MetroWest YMCA Hopkinton Branch
Middlesex Human Service Agency, Inc.
Millis Ecumenical Food Pantry
Minute Man ARC for Human Services
Natick High School
Natick Service Council, Inc.
Needham Community Council
New England Forestry Foundation
New England Wild Flower Society
Open Table, Inc.
Pan-Massachusetts Challenge
Partners in Health
Programs for People
Project Bread - Walk for Hunger
Project Just Because, Inc.
Rennie Center for Education Research & Policy
Rocky Mountain Center for the Musical Arts
Rural Land Foundation
Sacred Heart Church Food Pantry / Waltham
Salvation Army - Waltham Corps
Salvation Army/Framingham Food Pantry
School of the Museum of Fine Arts
Sherborn Community Center Foundation
SMOC Elderly Nutrition Program
SOAR 55
St. Anne Parish
St. Bridget's Food Pantry
St. Mary's Parish Center
St. Mary's Women and Children's Center
Stow Food Pantry
Sudbury Community Food Pantry
The Bates Fund
The Center for Arts in Natick
The Discovery Museums
The Jimmy Fund
The Learning Center for the Deaf
The Pilgrim Church
The Rivers School
Thompson Island Outward Bound Education Center
Thompson School PTO
United Parishes of Southborough Food Pantry
United Way of Tri-County
University of Massachusetts - Amherst
Walpole Community Food Pantry
Waltham Fields Community Farm
Wayside Youth & Family Support Network
Wellesley A Better Chance Program, Inc.
Wellesley Food Pantry
Wellesley Hills Junior Woman's Club, Inc.
Westborough Food Pantry
Westfield State College
Westwood Council on Aging
Women of Means

2010 Financial Statements

Statement of Financial Position

	2010	2009
ASSETS:		
Cash and cash equivalents	\$ 378,055	\$ 797,531
Investments	8,619,095	7,976,250
Unconditional promises to give	217,505	103,187
Property and equipment – net	37,891	30,318
Prepaid expenses and other assets	10,128	7,894
TOTAL ASSETS	<u>\$ 9,262,674</u>	<u>\$ 8,915,180</u>
LIABILITIES:		
Accounts payable and accrued expenses	\$ 18,018	\$ 13,454
Grants payable	32,430	1,000
Fiscal sponsorship funds	4,254	4,404
Capital lease	14,680	–
Agency endowment funds	568,224	528,231
TOTAL LIABILITIES	<u>\$ 637,606</u>	<u>\$ 547,089</u>
NET ASSETS:		
Unrestricted	\$ 3,780,633	\$ 3,613,435
Temporarily restricted	2,730,727	2,642,723
Permanently restricted	2,113,708	2,111,933
TOTAL NET ASSETS	<u>8,625,068</u>	<u>8,368,091</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 9,262,674</u>	<u>\$ 8,915,180</u>

Statement of Activities

	2010	2009
SUPPORT AND REVENUE:		
Contributions, grants and gifts	\$ 759,235	\$ 690,766
Investment income (loss)	713,215	1,116,028
Program fees	87,179	81,664
Loss on disposal of property and equipment	(1,783)	–
Net assets released from restriction	–	–
TOTAL SUPPORT AND REVENUE	<u>\$ 1,557,846</u>	<u>\$ 1,888,458</u>
EXPENSES:		
Grantmaking and other program expenses	\$ 956,942	\$ 818,357
Management and general	201,947	220,720
Fundraising and development	141,980	194,487
TOTAL EXPENSES	<u>\$ 1,300,869</u>	<u>\$ 1,233,564</u>
CHANGE IN NET ASSETS	\$ 256,977	\$ 654,894
ASSETS AT BEGINNING OF YEAR	<u>\$ 8,368,091</u>	<u>\$ 7,713,197</u>
ASSETS AT END OF YEAR	<u>\$ 8,625,068</u>	<u>\$ 8,368,091</u>

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Our Mission

The Foundation for MetroWest connects philanthropic opportunity with demonstrated need in Metrowest. We promote philanthropy in the region, help donors maximize the impact of their local giving, serve as a resource for local nonprofit organizations and enhance the quality of life for all of our citizens.



FOUNDATION FOR METROWEST

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