

# 2009 Annual Report



FOUNDATION FOR METROWEST

2009 was a year of change for the Foundation. In November, after much reflection and a strategic planning process, Crossroads Community Foundation officially changed its name to the Foundation for MetroWest. We believe that our new name effectively communicates our mission—that is providing services and support to our neighbors in MetroWest.

For the past fifteen years, the Foundation has been a part of the local philanthropic community. Over the past year, we have looked at our mission and strategy, and, in September of 2009, the Foundation's Board of Trustees approved a new strategic plan for the organization which will allow us to better meet the needs of MetroWest, today and in the future.

Our change from Crossroads to the Foundation for MetroWest was the first step. As we move forward under our new name, we are optimistic about our future as a philanthropic resource for the region. In an area of many riches, we are committed to preserving the quality and character of our community. This generation's legacy will be one of thoughtful planning and protection of our heritage, culture, open space, and our citizens.

We are grateful for your past investment and support, and look forward to working together in the years to come.

Sincerely,



Kenneth Vacovec

Chair, Board of Trustees



Judith Salerno

Executive Director

# Our Year in Review

- January** The Foundation begins its series of half-day seminars for members of non-profit boards. Throughout the year, we hold 5 seminars on topics such as fundraising, board recruitment, and how to better engage members.
- February** The Foundation convenes local funders to discuss our work and ways to collaborate.
- March** Members of the Youth Action Council begin visiting sites of grant applicants. This comes after five months of classes where they learned about philanthropy and how to make giving decisions.
- April** The Board of Trustees hires a consultant to begin researching the Foundation's brand. More than 50 community members, peers, and supporters are interviewed to get a better picture of how people see us.
- May** At the Foundation's Annual Meeting, members of the Youth Action Council distribute checks to their four grantees, and four local philanthropists are honored with the Woolsey S. Conover Award for Community Involvement. Later in May, the Foundation hosted an event where attorney Natalie Choate spoke to nearly 100 lawyers, financial planners and accountants about charitable giving and retirement benefits.
- June** The Board of Trustees votes to officially change our name to the Foundation for MetroWest. Foundation staff begin working on the re-branding project.
- July** On July 1st, the Distribution Committee releases its 2009 Request for Proposals. This year the Foundation is offering grants in three areas – Family Support, Environment, and Arts & Culture.
- August** Our grant application deadline, there is a 25% increase in applications from local nonprofits. After reading through applications, members of the Distribution Committee begin their site visits.
- September** The Board of Trustees approves the Foundation's strategic plan, and we come closer to formally changing our name.
- October** Our Professional Advisor Committee hosts an event with Jonathan Pond about how to survive the recession and thrive when the economy rebounds. The Foundation sponsors a convening to introduce the COMPASS Community College Collaborative program to potential partners and to discuss how together they can work to end family homelessness in MetroWest.
- November** Crossroads Community Foundation officially changes our name to the Foundation for MetroWest. We launch our new name at the beginning of Community Foundations Week. In addition, the Foundation sponsors "Marketing on a Shoestring," a seminar to help local nonprofits figure out the best way to market their organization to the community.
- December** The Foundation announces our 2009-10 Discretionary Grantees at a ceremony at the DeCordova Museum in Lincoln. We award \$160,000 to 22 different organizations.

# Funds of the Foundation (as of December 31, 2009)

## 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  
Bea and Woolsey Conover Fund  
DJ's Field Fund  
Dover Church Youth Fund  
English Family Fund  
Jacqueline Gannon Fund  
Michael Gannon Fund  
Sean Gannon Fund  
The Julia Fund  
Juniper Fund  
Kaiyana Fund  
James Jay Lavoie Memorial Fund  
Kelly McClintock and  
Bonnie Mineo Fund  
Mugford Family Fund  
Karen Owczarek Memorial Fund  
Pike Family Fund  
Poitras Memorial Fund  
James W. and Patricia T. Poitras Fund  
Louis Rosenblum Fund  
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  
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

# 2009 Donors

## Founders

### (\$5,000 and above)

Robert B. Brack and Janet Bailey  
Mr. and Mrs. Woolsey S. Conover  
The English Family Fund  
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Mr. and Mrs. Steven Lesser  
Middlesex Savings Bank  
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Mr. and Mrs. James Poitras  
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John M. McCluskey  
Mr. and Mrs. Robert D. Rands  
Mr. and Mrs. John H. Schwarz  
The Dorothy F. Thorne Foundation  
Mr. and Mrs. Kenneth J. Vacovec  
Mr. and Mrs. Kenneth Vona

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### (\$1,000 to \$4,900)

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Laurie Krigman and Nate Weinsaft  
Saul Pannell and Sally Currier  
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Kathan Tracy  
Stephen Van R. Winthrop and  
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## Supporters

### (\$250 To \$999)

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Mr. and Mrs. John B. Steiger  
Ms. Sandy Swartz  
Mr. and Mrs. John E. Thomas  
Mr. and Mrs. John L. Thompson  
Mr. Andrew Troop and  
Ms. Andrea Sussman  
Mr. and Ms. Thomas S. Ward  
Mr. and Mrs. Holyoke L. Whitney

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### (up To \$249)

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Barbara Fay and Dale Edmunds  
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Nancy Simpson-Banker  
Caroline D. Standley  
Mr. and Mrs. Brian D. Stewart  
Rick Stockwood  
Julian Web  
Mr. and Mrs. John Rodman Wright

# 2009 Gifts to Funds

## Deborah Blumer Fund for Civic Engagement

J. Michael Dineen

## Capacity Building Campaign

The Rands Foundation

Mr. and Mrs. Kenneth Vona

## Concord Common Weal Fund-Concord Academy YIP

Students of Concord Academy

## Concord Common Weal Fund-Concord-Carlisle YIP

Nicole Burkel and Tony Allison

Frederick Burnham and Mary Sterling

Students of Concord-Carlisle High School

Devra Feshbach-Meriney

Rebecca Hitchner

Carolynn Luby

Hugh Wedge

## Concord Common Weal Fund-Fenn School YIP Fund

Students of The Fenn School

## Concord Common Weal Fund-Middlesex School YIP

Students of Middlesex School

## Ciesielski Fund

Mr. Stan Ciesielski

## DJ's Field Fund

Modern Plumbing Supply, Inc.

## The English Family Fund

Mr. and Mrs. Ted English

## ESL Framingham Adult ESL PLUS Fund

Nancy Amstutz

Mr. and Mrs. James R. Baltimore

Michael Barry

Carney Management Co.

Ms. Anita Davis

Kevin Dunn

Eastern Bank

Martin Estner

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Leanne Friedman

Mr. and Mrs. Richard C. Flathers

Framingham Co-operative Bank Charitable Foundation

Gate House Media Massachusetts, Inc.

Jo-An Gladstone

Gray, Gray & Gray, LLP

The Hemenway, Inc.

The Highland Street Foundation

Information Marketing Group, Inc.

L & S Food Sales Corp.

Landry's

Law Firm of Michael P. Healy & Associates

Massbay Foundation

The John J. McArdle III & Joan Creamer McArdle Foundation

Metro Credit Union

MetroWest Chamber of Commerce

Middlesex Savings Bank

Mirick O'Connell

Leo Model Foundation

John Moran

Megan Quinlan

R. L. Goldman Company, Inc.

Stein & Company

TJX Companies, Inc.

W. A. Wilde Company

Theodore Welte

Whitney Place at Natick

Constance S. Wright

## Juniper Fund

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Leo Boyle

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Mr. Shawn Cryan

Mr Albert DeFranzo

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Northeast Investment & Development LLC

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Maura Robertson

Mr. and Mrs. Michael E. Ryan

Mr. and Mrs. Paul Siskind

Mary Skinner

Christopher S. Socha

Andrew Stone

Christopher Torri

Jacob Vincent

## Medway Foundation for Education

Medway Foundation for Education

## MetroWest Fund for Arts & Culture

Michele Levy

## MetroWest Fund for Families

Virginia Ferko and Mark Cohen

## Karen Owczarek Memorial Fund

Mr. and Mrs. Robert E. Hefferman

## Poitras Memorial Fund

Mr. and Mrs. James Poitras

## Sherborn Fund

Sherborn Fund

**Thompson Family Fund**

Mr. and Mrs. John L.  
Thompson

**Nathalie and John  
Thompson Family Fund**

Thompson Family Fund

**The Fund for Wellesley**

Ms. Marlene Allen

Ms. Angelika E. Angino

Mr. and Mrs. Richard L.  
Angle

Ms. Katherine L. Babson Jr.

Mr. and Mrs. Karl M.  
Baumann

Committee to Re-Elect  
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**Youth & Community  
Grant Making**

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**Youth in Philanthropy  
Operating Fund**

Anonymous

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Mr. Rob Vigoda

**Youth in Philanthropy  
Endowment Fund**

David and Nancy Aubrey

Colin and Diane Bailey

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Ms. Catherine L. Bunting

Laurance and Anne Clark

Mr. and Mrs. Leonard  
Gemma

Mr. and Mrs. Paul M.  
Margolis

The Ramsey McCluskey  
Family Foundation

**Event Sponsors**

Mass Mutual Financial  
Group

Windward Investment  
Management

# 2009 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

In 2009, the Foundation awarded \$100,000 in grants. They are:

**Advocates, Inc., \$10,000** *To provide services to individuals and families at risk for homelessness.*

**Employment Options, Inc. \$10,000** *To run and build the capacity of Furnishing Options.*

**Framingham Court Mediation Services, \$10,000** *To enable the organization to continue to offer free mediations in local courts by recruiting, training and supervising volunteer mediators.*

**Jewish Family Services of MetroWest, \$10,000** *To provide Woodrow Wilson Elementary School families with a Community Resources Specialist who provides links to employment, medical, housing, heating, nutrition and transportation programs.*

**MetroWest Outreach Connection Inc., \$10,000** *To prevent homelessness and to assist those who have lost their housing to obtain permanent housing.*

**Minuteman Senior Services, \$5,000** *To help keep older people safe from abuse, neglect and financial exploitation, through large group trainings and support groups.*

**Parenting Resources, Inc., \$10,000** *To help plan and launch COMPASS Community College Collaborative programming at Mass Bay Community College.*

**REACH Beyond Domestic Violence, \$7,500** *To educate communities about domestic violence and identifies resources to help survivors.*

**Second Step, Inc., \$5,000** *To provide legal assistance, advocacy, attorneys, and resource referrals to victims of domestic violence.*

**Springwell, Inc. \$5,000** *To fund trainings, presentations, and outreach materials to educate people about elder abuse and neglect.*

**WATCH, Inc. \$10,000** *To provide participants with community English classes, group discussions, and speakers on topics relevant to immigrant mothers.*

**Wayside Youth and Family Support Network, \$7,500** *To provide a liaison to manage the educational needs of middle to high school-aged boys and girls designated homeless by the state who are living at Wayside.*

## Arts & Culture Grants

In 2009, the Foundation awarded \$30,000 in grants. They are:

**Amazing Things Art Center, \$7,000** *To match a \$218,000 challenge grant from the Mass Cultural Council to pay for Phase II of their Art Center Construction Project.*

**Commonwealth Ballet, \$3,000** *To support their "Nightingale" performance, incorporating Western orchestration and traditional Chinese instrumentation.*

**DeCordova Museum & Sculpture Gardens, \$5,000**  
*To support Free Friday Nights, welcoming visitors with free admission to all special exhibitions and interactive galleries.*

**The Discovery Museums, \$5,000** *To give teens employees the opportunity to explore connections between the arts and sciences, the inner workings of a museum, and potential careers in science and education.*

**Framingham History Center, \$5,000** *To hire a part-time educator to create curricula, exhibitions, walking tours, pod casts, publications, to look at Framingham's history and its role in the Civil War.*

**Reagle Players, \$5,000** *To support "A Little Bit of Ireland"– one of the 2010 original revues.*

## Environmental Grants

In 2009, the Foundation awarded \$29,500 in grants. They are:

**New England Wildflower Society, \$10,000** *To support developing two electronic and web-based educational tours that reflect the visible seasonal differences in the Garden.*

**Massachusetts Audubon Association \$5,500** *To conduct an ecological evaluation for a proposed all-person accessible trail.*

**Orion Grassroots Network, \$500** *In support of their work in the region.*

**Southborough Open Land Project, \$7,000** *To hire a consultant to run the first year of their Stewardship and Outreach Program.*

**Waltham Land Trust \$7,000** *To improve the Shady Pond Conservation Area's existing trails and create education kiosks around the area.*

## Youth & Community Grants

In 2009, the Foundation for MetroWest awarded the following grants through our Youth in Philanthropy program:

**Acton/Boxborough/Littleton Community Partnership for Children**  
*To help low income working families pay for the high cost of quality early education for preschool children.*

**Agape International** *To partially fund the food bill for children at an AIDS orphanage in India.*

**Autism Alliance of MetroWest** *To provide general operating support.*

**Big Brothers Big Sisters of MetroWest** *To provide mentoring services to children and youth in MetroWest.*

**Boys & Girls Club of Metrowest** *To support the Torch and Keystone programs at the new Framingham Clubhouse.*

**Bright Futures Adoption Center** *To provide split-living assistance and general operating support.*

**BU Academy** *To support the Haley Morrill Fund.*

**Camp Starfish** *For tuition assistance support for needy families so that a young child with severe psychological and learning problems can attend Camp Starfish.*

**Discovery Museums** *To provide general operating support.*

**Easter Seals Massachusetts** *To support the Easter Seals Summer Camp and Youth Leadership Programs*

**Epiphany School** *To fund health and social services for students who attend Epiphany School.*

**Esperanza Academy** *To fund transportation costs and lunch for fifth grade students to attend Nashoba Brooks Summer Center.*

**Families for Depression Awareness** *To develop guides, forums, and clubs about teen depression and suicide prevention, at MetroWest schools.*

**Home for Little Wanderers** *To support a group home for GLBTQ youth that assists and enables them to develop the skills necessary to return to living in a family environment.*

**Household Good Recycling of Massachusetts** *To collect and transport furniture to families who are getting their first apartment but cannot afford household items.*

**Kartwheels-In-Motion** *To support recreational programs that provide special needs children with opportunities to participate in activities, such as an adapted gym and pool sessions.*

**The Learning Center for the Deaf** *To support two Walden School students to participate in Outward Bound experience on Hurricane Island.*

**MetroWest YMCA** *To support High Flight, an adventure-based program designed to develop self-confidence and social skills in at risk teenagers.*

**More Than Words** *To provide holistic services that allow court-involved and foster-care youth to transition to jobs and college.*

**New Repertory Theatre** *To partially fund a free educational performance of Othello to Waltham High School.*

**Operation Outreach** *To provide literacy and character education to students at Avery Elementary in Dedham.*

**Resiliency for Life** *To help at risk students from Framingham High School complete school and gain admission to college.*

**Shriners Hospital Boston** *To support their gift bag program.*

**Sudbury Valley Trustees** *To support the Youth Conservation Steward Program.*

**Waltham Boys & Girls Club** *To fund the technology program.*

## Grants from Donor Advised Funds

A Place to Turn  
Acton Food Pantry  
Adolescent Consultation Services  
Advocates, Inc.  
ALS "We Have Faith Fund"  
ARC of Greater Boston  
Ashland Emergency Fund – Food Pantry  
Assabet Valley Little League  
Bear Creek Elementary School Arts Education  
Belmont Day School Capital Campaign  
Beth El Temple Center  
Bethany Hill School  
Big Brothers Big Sisters of MetroWest  
Boys & Girls Club of MetroWest  
Bristol Lodge  
Cambridge School of Weston  
Celebration International Church – Food Pantry  
Chabad Center of Natick  
Chapel Hill-Chauncy Hall  
City of Marlborough – Gately Scholarship  
Colorado Shakespeare Festival  
Communities United  
Community Supper, Inc.  
Community Therapeutic Day School  
Congregation Dorshei Tzedek  
Cornell University  
Cornerstone Foundation of the Pilgrim Church  
Dedham Food Pantry  
East Coast Greenway Alliance  
Family-to-Family Project  
First Parish Church in Wayland  
Framingham ESL Plus Fund  
Framingham High School  
Friends of Sudbury Park and Recreation, Inc.  
Friends of the Milford Upper Charles Trail  
Friends of the Norris Cotton Cancer Center  
Gaining Ground  
Grandma's Food Pantry  
Growing Places Garden Project  
Holliston Pantry Shelf  
Home for Little Wanderers  
Hope Worldwide New England  
Household Goods Recycling  
Hudson Food Pantry  
Impact on Education  
Jewish Family Services of MetroWest  
JF & CS Family Table  
Lafayette Elementary School  
Lexington Food Pantry  
Loaves & Fishes Food Pantry

Lucy & Joe's Food Pantry for Frail Elders  
Marlborough Community Services  
Mass College of Art  
Maynard Community Chest  
Maynard Food Pantry  
Medfield Food Cupboard  
Medway Food Pantry  
Medway Village Food Pantry  
MetroWest Harvest  
Milford Food Pantry  
Minute Man ARC  
Museum of Printing  
Natick High School – Tiberio Scholarship  
Natick Service Council Food Pantry  
Natick Visiting Nurse Association  
Needham Community Council Food Pantry  
New Arts Center  
New England Forestry Foundation  
Nurturing Minds  
Open Table – Concord  
Open Table – Maynard  
Orion Grassroots Network  
Pan Mass Challenge  
Programs for People  
Project Just Because  
REACH Beyond Domestic Violence  
Sacred Heart Church Food Pantry  
Salvation Army Framingham – Food Pantry  
Salvation Army Waltham – Food Pantry  
Salvation Army Worship and Service Center  
School of the Museum of Fine Arts  
St. Bridget's Food Pantry  
St. Mary's Parish Center  
Stow Food Pantry  
Sudbury Community Food Pantry  
Temple University – Edward J Riley Scholarship  
The Bridge of Central Massachusetts, Inc.  
The Center for the Arts in Natick  
The Elephant Sanctuary  
Thompson School PTO  
United Parishes of Southborough Food Pantry  
University of Massachusetts – Edward J. Riley Scholarship  
Walker School  
Walpole Community Food Pantry  
Waltham Fields Community Farm  
WATCH, Inc.  
Wellesley Council on Aging  
Wellesley Health Department  
Westborough Food Pantry  
Westwood Council on Aging

# 2009 Financial Statements

## Statement of Financial Position

	2009	2008
ASSETS:		
Cash and cash equivalents	\$ 797,531	\$ 1,629,428
Investments	7,976,250	6,563,300
Unconditional promises to give	103,187	172,818
Property and equipment – net	30,318	37,630
Prepaid expenses and other assets	7,894	7,415
TOTAL ASSETS	<u>\$ 8,915,180</u>	<u>\$ 8,410,591</u>
LIABILITIES:		
Accounts payable and accrued expenses	\$ 13,454	\$ 12,665
Grants payable	1,000	5,000
Fiscal sponsorship funds	4,404	176,390
Agency endowment funds	528,231	503,339
TOTAL LIABILITIES	<u>\$ 547,089</u>	<u>\$ 697,394</u>
NET ASSETS:		
Unrestricted	\$ 3,500,318	\$ 2,977,136
Temporarily restricted	2,755,840	2,624,186
Permanently restricted	2,111,933	2,111,875
TOTAL NET ASSETS	<u>8,368,091</u>	<u>7,713,197</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 8,915,180</u>	<u>\$ 8,410,591</u>

## Statement of Activities

	2009	2008
SUPPORT AND REVENUE:		
Contributions, grants and gifts	\$ 690,766	\$ 697,785
Investment income (loss)	1,116,028	(1,660,131)
Program fees	81,664	84,989
Special events	–	8,950
Loss on disposal of property and equipment	–	(1,228)
Net assets released from restriction	–	–
TOTAL SUPPORT AND REVENUE	<u>\$ 204,691</u>	<u>\$ (869,635)</u>
EXPENSES:		
Grantmaking and other program expenses	818,357	1,310,410
Management and general	220,720	196,975
Fundraising and development	194,487	20,199
TOTAL EXPENSES	<u>\$ 1,233,564</u>	<u>\$ 1,527,584</u>
CHANGE IN NET ASSETS	654,894	(2,397,219)
ASSETS AT BEGINNING OF YEAR	<u>\$ 7,713,197</u>	<u>\$ 10,110,416</u>
ASSETS AT END OF YEAR	<u>\$ 8,368,091</u>	<u>\$ 7,713,197</u>

## Board of Trustees

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*Wealth Planning Resources*

Kathan Tracy  
*Broad Institute*

Kenneth Vona, Vice Chair\*  
*Ken Vona Construction, Inc.*

\* *Executive Committee Member*

## Board of Advisors

*Our Board of Advisors is made up of professionals from a wide variety of disciplines. Each sits on a committee that best reflects their area expertise.*

### **Audit Committee**

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Garry Holmes

Paul McKeon

Kenneth Vacovec

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Robert Brack

Helene Carter

Julie Dobrow

Barbara Fay

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Marylynn Gentry

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Leah Flanigan, *Director of Development*

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Jennifer Ubaldino, *Youth in Philanthropy Coordinator*

Mary Crowley, *Office Administrator*

## 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.



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