

# 2012 Annual Report



FOUNDATION FOR METROWEST

The past year was one of continued growth for Foundation for MetroWest in its dedication to increasing philanthropy to positively impact our communities. In May, we moved to new offices, which has allowed us many unique opportunities to convene members of the MetroWest community, bring visibility to the challenges facing the communities in which we live and work, and engage our partners in improving the quality of life for all of our residents.


Philanthropic support is more important than ever as the needs of our most vulnerable residents continue to increase throughout the region. At the same time, municipal, state and federal budgets continue to decrease, widening the gap between needs and available funding. Recognizing the need to make a greater impact in our communities, we saw much success in 2012 in our campaign to grow the MetroWest Fund for Families, which was created to build a permanent source of funding to strengthen families and our region. We expect to complete this \$2.5 million initiative in 2013.

In the fall, the Foundation hosted its first corporate philanthropy event titled, *Business Leaders and Community Philanthropy: An Important Partnership*. Our debut event – filled to capacity with local business and community leaders – exceeded our expectations. We were honored to have President Len Schlesinger of Babson College as our keynote speaker discuss the importance of incorporating community philanthropy into a successful business model. Len’s powerful message, that corporate philanthropy is not only an “obligation” but a “huge opportunity”, is pertinent to our work and provided an opportunity to begin the discussion with local business leaders on their corporate philanthropy and our collective roles in sustaining the region together.

We are pleased that in raising the level of visibility of the needs in our region and in helping donors and fundholders support the causes that are important to them, the Foundation distributed over \$1.1 million in charitable grants over the year.

Your continued generosity to our work in the region positively impacts the lives of individuals and also enhances the quality of life in MetroWest. 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

# Our Work in the Community

Throughout the 33 diverse cities and towns of our region, Foundation for MetroWest serves as a leader in understanding the unique challenges of our region and catalyst to address those needs. Our grantmaking, nonprofit programming and philanthropy education strengthen and enhance the quality of life in our area. Collaboration with our donors, fundholders, partners and friends allows us to build collective support to maximize our impact in the region. This spirit of collaboration has informed many of our initiatives – all of which are designed to steward resources to create, strong vibrant communities.

**MetroWest Hunger Relief Fund** During our 2012 discretionary grant cycle, we saw a dramatic increase in requests for food support over the prior year. Understanding the prevalence of food insecurity in our communities, the Foundation established the MetroWest Hunger Relief Fund with the purpose of directing more resources to our local food pantries and food support organizations. Inspired by a generous challenge from a Foundation fundholder, our donors and fundholders came together to award \$85,500 to local food pantries and food support organizations in 26 different MetroWest communities. This collective effort significantly supported hundreds of MetroWest families. We will continue to monitor the serious issue of food insecurity in our region and work with our donors and fundholders to ensure that the shelves at our region's food pantries are full.

**MetroWest Fund for Families** Consistent with the growth of suburban poverty across the United States, we have seen poverty rates significantly increase in our region and more families facing economic challenges than ever before. While there are many highly effective and active organizations dedicated to providing family services in MetroWest, there is no single fund or funding organization that is building resources to address either the broad geographic area or the breadth of needs.

To narrow the gap between available funding and need we continue our efforts to complete the \$2.5 million MetroWest Fund for Families campaign. By increasing and endowing this Fund at the Foundation, we will be able to provide the necessary resources to put food on the table, a roof overhead, and a sense of security for families in our region.

**The Jericho Road Project** Recognizing the crucial role played by board leadership in the success of the nonprofits we serve, the Foundation partnered with The Jericho Road Project to bring The Leadership Connection to MetroWest. This valuable educational program was made possible through our fundholders who understand the importance of recruiting and training top executive talent and matching them with MetroWest nonprofit organizations. This program also gives MetroWest business leaders opportunities to make a difference in their communities by participating on local nonprofit boards.

**Nonprofit Educational Programming** The Foundation plays an important role in building capacity, visibility, connections and expertise that the nonprofits need to deliver their missions and in turn strengthening the region. To that end, the Foundation provides free educational programming in a wide array of areas:

- The Foundation offers like-minded organizations – from historical societies to town educational funds to community groups committed to environmental preservation – the opportunity to convene to share ideas and challenges, as well as to identify opportunities for points of collaboration.
- The Foundation offers free seminars to nonprofits on diverse topics such as – social media, development, marketing and volunteer management.
- The Foundation hosts Board Chair Dinners to provide opportunities for the leaders of MetroWest nonprofits to exchange ideas and share best practices through a professionally facilitated discussion.

Each day we provide opportunities to address the needs in the region with all of our constituents. We are grateful to the collective support of individuals and organizations that have contributed to our work in creating strong vibrant communities – now and for the future.

# Funds of the Foundation (as of December 31, 2012)

## Donor Advised Funds

*Provide grants based on regular advice by the donors*

Andrew Ross and Leslie George Fund  
Anson-Bass-Charron Fund  
Herbert and Esther Atkinson Fund  
Brack Family Fund  
Carls Fund  
Ciesielski Fund  
The Cohen-Gertz Family Fund  
Bea and Woolsey Conover Fund  
Helen & Miner Crary Fund  
Crotty Family Fund  
DJ's Field Fund  
Dover Church Youth Fund  
English Family Fund  
Gannon Family Fund  
Jacqueline Gannon Fund  
Michael Gannon Fund  
Sean Gannon Fund  
Frances O'Connor Gunn Legacy Fund  
Heritage Chorale Fund  
R & S Hoch Family Fund  
Garry and Elaine Holmes Charitable Fund  
The Julia Fund  
Kaiyana Fund  
James Jay Lavoie Memorial Fund  
The Lillian Award Fund  
Mugford Family Fund  
Karen Owczarek Memorial Fund  
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## Designated Funds

*Support specified agencies and programs*

ANP Blackstone Restoration Fund  
The Ashland Town Emergency Fund  
Concord Common Weal Fund  
Maynard Education Foundation Fund  
MetroWest ESL Fund  
Medway Foundation for Education Fund  
Newton South High School Alumni Gift Fund  
West Suburban Alliance of Gay & Lesbian Youth Fund

## Giving Area Funds

*Support discretionary grants to organizations in named areas*

MetroWest Fund for Arts & Culture  
MetroWest Fund for Education  
MetroWest Fund for Environment  
MetroWest Fund for Families  
MetroWest Fund for Hunger Relief  
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  
Boston Society of Young Philanthropists Fund  
Community Fund of Lexington  
Foundation for MetroWest Youth in Philanthropy Fund  
Jackson Youth and Community Fund  
MetroWest Watershed Preservation Fund  
Nyanza Fund  
A Path in the Woods Fund

The Ernestine and Josephine Sigmund Fund

The 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  
The Juniper Fund  
Edward L. Riley Memorial Scholarship Fund  
Gillian Tara Shor Fund  
Mary June Nylander Souza Scholarship Fund  
Technology Leadership Legacy Scholarship  
Settimeo Tiberio Natick High School Scholarship Fund

## Nonprofit Agency Funds

*Support the operations and programs of specific agencies*

Adolescent Consultation Services 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 Fund  
Garden in the Woods Fund  
Land's Sake Fund  
Learning Center for Deaf Children Fund  
Maynard Community Chest Endowment Fund  
MetroWest YMCA Fund  
Mildred B. Turenne Framingham Civic League Fund  
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Medway Foundation for Education

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# 2012 Grants

The Foundation awards discretionary grants through an open, competitive process reviewed and selected by the Distribution Committee and approved by the Board of Trustees. 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 development grant recipients.

## Family Support Grants

**Advocates, Inc., Framingham, \$7,500** *To fund an Advocacy Benefits & Legal Services staff person at the Community Counseling Outpatient Clinic, Marlborough, MA.*

**Assabet Valley Collaborative, Marlborough, \$5,000** *To expand the community-based Family Support Partnership program to improve both mental and physical outcomes.*

**Bethany Hill School, Framingham, \$2,500** *To support operational expenses associated with programming to enhance the self-sufficiency of the 150 residents.*

**Charles River Center, Needham, \$5,000** *To help fund a fully accessible home for adults with moderate to severe developmental difficulties.*

**Employment Options Inc., Marlborough, \$10,000** *To fund a part-time Program Director for Furnishing Options, which distributes free household items to low income families.*

**Family Promise, Natick, \$10,000** *To support operations that help families move from shelter programs to transitional housing.*

**Framingham Adult ESL Plus, Framingham, \$4,500** *To fund a 15-week evening citizenship class of 15-18 students.*

**Friends of the Millis Library, Millis, \$2,000** *To expand free programming available to senior citizens from Millis and surrounding towns.*

**Jeff's Place, Wayland, \$3,500** *Staff funding to support program development, education, training and client intervention for children experiencing loss and grief.*

**Jewish Family Service of MetroWest, Framingham, \$10,000** *To fund a bilingual Community Resource Specialist to link low income families with state and community resources.*

**MetroWest Legal Services, Framingham, \$10,000** *To support the Homeless Advocacy Project attorney providing timely, high quality legal assistance to at least 115 individuals and families.*

**Minuteman Senior Services, Burlington, \$5,000** *To fund Meals on Wheels. Hot lunch will be delivered to 40 homebound, vulnerable seniors in 9 MetroWest communities.*

**Natick Service Council, Natick, \$10,000** *To support Case Management programs which serve as a gateway to other programs including food support, housing and utility assistance.*

**REACH Beyond Domestic Violence, Waltham, \$5,000** *To support the Community Based Advocacy Program for survivors of domestic violence who do not reside in shelters.*

**South Middlesex Opportunity Council, Framingham, \$10,000** *To support the Young Parent Education program for families in shelters.*

**Waltham Partnership for Youth, Waltham, \$5,000** *To fund a summer program to prevent summer learning loss and provide maximum time for kindergarten readiness.*

**Waltham Fields Community Farm, Waltham, \$5,000** *To support the Food Access program which grows organic vegetables and makes them available to low income families.*

**WATCH, INC., Waltham, \$10,000** *To support ongoing operations, including English classes with life and job skills curriculum, ESL tutoring and Leadership Civic Engagement classes.*

## Arts & Culture Grants

**Center for Arts in Natick, Natick, \$7,500** *This grant will fund a major technology upgrade to the audio system in the main performance hall.*

**Chhandika, Inc., Waltham, \$3,500** *Funding of a world class performance, 'Sita Haran', by Pandit Das. A community education series will be held in conjunction with the performance.*

**Concord Conservatory of Music, Concord, \$3,500** *To fund a Dalcroze Eurhythmics class for senior citizens. Classes will aid motor, cognitive, and audio skill development.*

**The Discovery Museums, Acton, \$5,000** *To fund the development of a concept paper for an outdoor program which will greatly expand offerings and keep pace with growth in demand.*

**Framingham History Center, Framingham, \$10,000** *Development of a Civil War workshop for 20 middle/high school teachers to enable them to create classroom curriculum.*

**Hopkinton Arts Center, Hopkinton, \$7,500** *Funding for teen after school visual arts and music/theater classes and for senior art/lecture workshop series and acting classes.*

*continued next page*

**Longfellow's Wayside Inn, Sudbury, \$1,500** *To support the restoration of the one-room 1798 Redstone Schoolhouse, used to teach visitors about early rural education.*

**New Repertory Theatre, Inc., Watertown, \$10,000** *Funding for free performances in underserved MetroWest schools.*

## Youth Development Grants

**African Food and Peace Foundation, \$2000** *Tuition for two students to go to school for one year at URDT Girl's School.*

**Ben Speaks Louder Than Words, Medway, \$2,200** *"Be the Change" Empowerment Series for youth aimed at stopping the trends of depression, bullying and teen suicide.*

**Big Brothers Big Sisters of Central Mass/MetroWest, Framingham, \$5,000** *One-on-One Mentoring Program for disadvantaged youth.*

**Chesterbrook Community Foundation, Inc., Waltham, \$4,350** *Academic support and afterschool enrichment for children in low-income housing projects.*

**Children's Island, Concord, \$800** *Grants for students who want to continue their education or vocational training. Funds will go towards textbooks, bus fare, school materials, and uniforms.*

**Eliot Community Human Services, Lexington, \$5,509** *Greenhouse/Gardening Program for troubled youth.*

**Everybody Wins, Boston, \$4000** *Read-aloud lunch program at lower income schools in Framingham and Waltham.*

**Friends of Resiliency for Life, Framingham, \$4,000** *Academic support to at-risk Framingham High School students working towards graduation and college admissions.*

**Gaining Ground, Inc., Concord, \$3,500** *Purchase of a tractor to help produce food for hunger relief.*

**Heading Home, Cambridge, \$2,500** *To help homeless people through permanent housing, transitional housing, and shelter and emergency services.*

**John Andrew Mazie Memorial Foundation, Wayland, \$4,000** *Funds will be used to offset personnel costs for this mentoring program of at-risk high school students in Framingham and Waltham.*

**Metrowest YMCA, Framingham, \$5,000** *Outdoor Leadership Adventure Program for disadvantaged teens.*

**MinuteMan ARC, Concord, \$1,500** *To give children with special needs the opportunity to experience the joy of playing baseball while being part of a community.*

**Miracle League of Massachusetts, Acton, \$1,500** *To give children with special needs the opportunity to experience the joy of being part of a baseball team.*

**NEADS, Inc., West Boylston, \$2,500** *To provide canine assistance to the deaf or disabled.*

**REACH Beyond Domestic Violence, Waltham, \$2,000** *To fund teen dating violence prevention program, Peers Against Violence (PAVE).*

**Waltham Partnership for Youth, Waltham, \$2,000** *Healthy Eating, Cooking & Gardening initiative for low income children.*

**Wayside Youth & Family Support Network, Framingham, \$4,350** *Drop-in group for 9-15 year old boys living in Framingham public housing.*

**West Suburban Alliance for Gay and Lesbian Youth, Wellesley, \$2,100** *To fund a part-time Program Coordinator.*

## Grants from Donor Advised Funds

A Place to Turn

Acton Community Supper & Food Pantry

Adolescent Consultation Services

Advocates, Inc.

Alpha & Omega Deaf Church

Ashland Emergency Fund

Asperger's Association of New England

Assabet Valley Little League

Associated Grant Makers

Babson College

Bear Creek Elementary School

Bentley College

Best Friends Animal Society

Beth El Temple Center

Boston Public Library Foundation

Brain Tumor Foundation for Children, Inc.

Buddy Dog Humane Society, Inc.

Building Impact

Camp Susan Curtis

Celebration International Church Food Pantry

Chapel Hill - Chauncy Hall School

Charles River Watershed Association

City of Marlborough Heat & Eat Program

Community Food Share

Community Therapeutic Day School

Congregation Dorshei Tzedek

Cradles to Crayons

Curry College

Daily Bread Food Pantry

Dedham Food Pantry

Employment Options, Inc.

Families for Depression Awareness  
 Family Promise  
 First Parish Wayland  
 Foundation for MetroWest  
 Framingham Adult ESL Program  
 Friends of the Goodnow Library  
 Friends of the Lafayette Public Library  
 Friends of the Milford Upper Charles Trail  
 Friends of The Norris Cotton Cancer Center  
 Grandma's Pantry  
 Greater Boston Food Bank  
 Greyhound Friends  
 Heifer Project International, Inc.  
 Holliston Pantry Shelf  
 HOPE Worldwide New England, Inc.  
 Hudson Community Food Pantry  
 Impact on Education  
 Jericho Road Project  
 Jewish Family and Children's Service  
 Jewish Family Service of MetroWest  
 Kimberton Waldorf School  
 Land's Sake  
 Lexington Interfaith Outreach Food Pantry, Inc.  
 Lovin' Spoonfuls  
 Lucy & Joe's Food Pantry for Frail Elders  
 Lucy MacKenzie Humane Society  
 Manville School  
 Massachusetts College of Pharmacy & Health Sciences  
 Massachusetts Society for the Prevention of Cruelty to  
     Animals  
 Maynard Education Foundation  
 Maynard Food Pantry  
 Medfield Food Cupboard  
 Medway Food Pantry / Medway Housing Authority  
 Medway Village Food Pantry  
 MetroWest Fund for Families  
 MetroWest Legal Services, Inc.  
 MetroWest Nonprofit Network  
 Middlebury College  
 Middlesex Human Service Agency, Inc.  
 Middlesex School  
 Millis Ecumenical Food Pantry  
 Minute Man ARC for Human Services  
 Museum of African American History  
 Natick Center Associates  
 Natick High School  
 Natick Service Council, Inc.  
 NEADS, Inc.  
 Needham Community Council  
 Newton South High School  
 Northeastern University  
 Nurturing Minds  
 Open Table, Inc.  
 PEARS Program in Education  
 Programs for People  
 Project Just Because, Inc.  
 REACH Beyond Domestic Violence  
 Restoration Project, Inc.  
 Room to Dream Foundation  
 Sacred Heart Church Food Pantry / Waltham  
 Salvation Army - Milford Corps  
 Salvation Army - Waltham Corps  
 Sarah Lawrence University  
 St. Anne Parish  
 St. Bridget's Food Pantry  
 St. Mary's Parish Center  
 Stop Handgun Violence  
 Stow Food Pantry  
 Sudbury Community Food Pantry  
 The Bates Fund  
 The Center for Arts in Natick  
 The Fenn School  
 The Framingham High School Foundation  
 The Learning Center for the Deaf  
 The Michael Carter Lisnow Respite Center  
 The Rivers School  
 Thompson Drama Project  
 Town of Wellesley  
 Unitarian Universalist Society of Wellesley Hills  
 United Parishes of Southborough Food Pantry  
 United Way of Tri-County  
 Vermont Food Bank  
 Walker School  
 Walpole Community Food Pantry  
 Wellesley Food Pantry  
 Wellesley Friendly Aid  
 Westborough Food Pantry  
 Westwood Council on Aging  
 WISE  
 Worcester County Food Bank  
 Yale University

# 2012 Financial Statements

## Statement of Financial Position

	2012	2011
ASSETS:		
Cash and cash equivalents	\$ 714,335	\$ 478,014
Investments	10,021,091	8,727,547
Unconditional promises to give	1,157,236	1,265,218
Property and equipment – net	7,627	26,495
Prepaid expenses and other assets	8,955	9,487
TOTAL ASSETS	<u>\$ 11,909,244</u>	<u>\$ 10,506,761</u>
LIABILITIES:		
Accounts payable and accrued expenses	\$ 22,082	\$ 13,862
Grants payable	34,000	–
Capital lease	1,318	8,021
Agency endowment funds	583,087	556,452
TOTAL LIABILITIES	<u>\$ 640,487</u>	<u>\$ 578,335</u>
NET ASSETS:		
Unrestricted	\$ 6,555,885	\$ 4,483,714
Temporarily restricted	3,136,237	3,357,967
Permanently restricted	1,576,635	2,086,745
TOTAL NET ASSETS	<u>11,268,757</u>	<u>9,928,426</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 11,909,244</u>	<u>\$ 10,506,335</u>

## Statement of Activities

	2012	2011
SUPPORT AND REVENUE:		
Contributions, grants and gifts	\$ 2,091,067	\$ 2,475,175
Investment income	910,273	119,756
Program fees	5,907	92,924
Special Events	105,532	–
Loss on disposal of property and equipment	(17,104)	–
Net assets released from restriction	–	–
TOTAL SUPPORT AND REVENUE	<u>\$ 3,095,675</u>	<u>\$ 2,687,855</u>
EXPENSES:		
Grantmaking and other program expenses	\$ 1,421,026	\$ 1,072,301
Management and general	200,225	194,957
Fundraising and development	134,093	117,239
TOTAL EXPENSES	<u>\$ 1,755,344</u>	<u>\$ 1,384,497</u>
CHANGE IN NET ASSETS	\$ 1,340,331	\$ 1,303,358
ASSETS AT BEGINNING OF YEAR	<u>\$ 9,928,426</u>	<u>\$ 8,625,068</u>
ASSETS AT END OF YEAR	<u>\$ 11,268,767</u>	<u>\$ 9,928,426</u>

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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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