

2011 Annual Report



FOUNDATION FOR METROWEST

Over the past year we have followed the continuing changes in the region.

Our population is aging rapidly, and the recession has taken its toll. Like so many suburban areas in the U.S., we have pockets of great need. Many of our neighbors are struggling with job loss, as well as housing, food, and fuel insecurity.

As a community foundation, the Foundation for MetroWest plays a key role in understanding these issues, and identifying and solving gaps between services and problems. We understand the economic struggles faced by municipalities as they strive to meet the demands of their changing populations.

Our communities are diverse, each with its own strengths and set of needs. It is now more important than ever to collaborate with funders, nonprofits, and those in the public sector to address issues that threaten our quality of life. A vibrant, permanent community foundation that can work across boundaries is necessary for our cities and towns to handle the challenges of today, and stand ready to tackle those of the future.

Our Trustees are dedicated to growing the Foundation for MetroWest to take a leadership position. We are committed to the long-term health of our region, and to using philanthropy to have a positive and long-lasting impact.

During 2012, the Foundation will continue to enlist more people from the community in our work, increasing the representation on our board, and involving more individuals in our committees. We will engage the business community to help us take a leading role in growing and sustaining wonderful communities in which to live and work and raise our families. We will spread the word about the challenges our region faces, and the opportunities we have to address them.

We remain grateful to the many people who support us in this work. Individual donors, fund-holders and local businesses are the core of the Foundation, and we are grateful for your generosity and commitment. We stand ready to connect you to causes you are passionate about and to help our children understand the value of civic engagement.

As your partner in philanthropy, we look forward to working with you as we move forward.

Sincerely,



Ken Vona
Chair, Board of Trustees



Judith Salerno
Executive Director

The MetroWest Fund for Families

In response to the changes we see in our region, the expanding needs being reported by local family service nonprofits, and the increasing gap between grant requests and our ability to fund them, the Foundation for MetroWest is embarking on a campaign to significantly increase the MetroWest Fund for Families. By strengthening this permanent Field of Interest Fund, the Foundation will be able to provide ongoing support to organizations serving the residents in our area to improve their quality of life, help them lead productive lives, and keep them integrated in their communities.

Economic difficulties are deeply felt in MetroWest, where both the overall cost of living and housing costs significantly exceed the national average. Like most suburban areas in the U.S., we have seen poverty rates increase and we have more families facing challenges than ever before. Our region is large, spanning 33 towns and cities over 500 square miles, so it can be difficult to communicate the availability of services to the MetroWest citizens who need them.

While there are many highly effective and active organizations dedicated to providing family services, there is no single fund or funding organization that is building resources to address either the broad geographic area or the breadth of needs. Consider these examples of challenges our region must address over the coming years:

- Approximately 15% of all public school children receive free/reduced lunches across MetroWest, with the percentage as high as 30% in some communities.
- The population of residents over 65 who will need health, transportation, home care, nutritional and other services is expected to increase by 49% between 2010-2020.
- At least 5 communities have significant poverty rates, with needs for housing, food, and fuel assistance.

Needs are increasing, while state, municipal, and federal budgets for family support services are decreasing. In addition, the Foundation has been able to fund less than one quarter of the family support grant dollars requested in recent years, and the gap continues to grow.

After reviewing the data on changing economics and demographics, the Board of Trustees of the Foundation has decided that we must work to close the funding gap. In keeping with our tradition of stewarding funds to support individuals and families, we will be working with donors to build the MetroWest Fund for Families to bring more philanthropic dollars into our communities.

Growing the MetroWest Fund for Families is a strategic focus for us during 2012. By increasing this fund, the Foundation can lead the way in addressing the needs of today while establishing an endowment to take on the challenges of the future.

Funds of the Foundation (as of December 31, 2011)

Donor Advised Funds

Provide grants based on regular advice by the donors

Anson-Bass-Charron Fund
Herbert and Esther Atkinson Fund
The Brack Family 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
Gannon Family Charitable Fund
Jacqueline Gannon Fund
Michael Gannon Fund
Sean Gannon Fund
Frances O'Connor Gunn Legacy Fund
R & S Hoch Family Fund
Garry and Elaine Holmes Charitable Fund
The Julia Fund
Kaiyana Fund
James Jay Lavoie Memorial Fund
Lillian Award 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
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
MetroWest ESL Fund
Maynard Education Foundation Fund
Newton South High School Alumni Gift Fund

Giving Area Funds

Support discretionary grants to organizations in named areas

Foundation for MetroWest Discretionary Grantmaking Fund
Foundation for MetroWest Sustainability Fund
MetroWest Fund for Arts & Culture
MetroWest Fund for Education
MetroWest Fund for Environment
MetroWest Fund for Families
MetroWest Fund for Youth Development

Field of Interest Funds

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

Boston Society of Young Philanthropists Fund
Deborah Blumer Fund for Civic Engagement
Foundation for MetroWest Youth in Philanthropy Fund
Jackson Youth and Community Fund
Metrowest Watershed Preservation Fund
Nyanza Fund
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

Juniper Fund
Gillian Tara Shor Fund
Lewis Clapp Memorial Fund
Edward L. Riley Memorial Scholarship Fund
Technology Leadership Legacy Scholarship
Mary June Nylander Souza Scholarship Fund
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
Medway Foundation for Education Fund
Metro West YMCA
Mildred B. Turenne Framingham Civic League Fund
United Way of Tri-County Fund

2011 Donors to the Foundation

Sustainer (\$15,000 and above)

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Mr. Robert B. Brack
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2011 Donors to the Foundation

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Ashland Emergency Fund

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Ms. Marcia Cooper and Mr. Jeffrey Rosenberg

Ms. Mary Crowley

Mr. David Gordon

Mr. Eric Kaufman

Mr. and Mrs. Mark Kaufman

Ms. Cori Rosenberg

Ms. Judy Salerno

Brack Family Fund

Mr. Robert B. Brack

Ciesielski Fund

Mr. Stan Ciesielski

Deborah Blumer Fund for Civic Engagement

Ms. Anne Murphy

Foundation for MetroWest Discretionary Grantmaking Fund

Mr. Robert B. Brack

Bea and Woolsey Conover Fund

Mr. and Mrs. Woolsey S. Conover

Ms. Davis C. Greene

MetroWest Watershed Preservation Fund

Poitras Memorial Fund

Rands Family Foundation

Ernestine and Josephine Sigmund Fund

Sudbury Sportsman's Fund

Foundation for MetroWest Sustainability Fund

Ms. Janet Bailey and
Mr. Robert B. Brack

Ms. Margaret A. Ramsey and
Mr. John M. McCluskey

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Mr. and Mrs. Kenneth Vona

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Community Foundation of Northern
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Medway Foundation for Education

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A Path in the Woods Fund

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Mr. Daniel Pearl
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Gordon's Fine Wine & Culinary Center
Middlesex Savings Bank Charitable
Foundation
Vacovec, Mayotte & Singer, LLP
Wealth Planning Resources

2011 Grants

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

Family Support Grants

Advocates, Inc., Framingham, \$10,000 To fund an Advocacy Benefits & Legal Services staff person at the Community Counseling Outpatient Clinic, Marlborough, MA.

Assabet Valley Collaborative, Marlborough, \$10,000 To expand the community-based Family Support Partnership program to improve both mental and physical outcomes.

Bethany Hill School, Framingham, \$5,000 To support operational expenses associated with programming to enhance the self-sufficiency of the 150 residents.

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.

Framingham Adult ESL Plus, Framingham, \$4,500 To fund a 15-week evening citizenship class or 15-18 students to help them meet their goals.

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.

JRI Health, Framingham, \$5,500 To provide food assistance for 140 low-income clients with HIV/AIDS in Framingham, helping them stay healthier.

Lexington Youth and Family Services, Lexington, \$5,000 To expand services from one to two afternoons per week and add an evening adolescent and parent support group.

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, \$7,500 To fund Meals on Wheels, delivering a hot lunch to 40 homebound, vulnerable seniors in 14 communities.

New Hope Inc., Attleboro, \$7,500 To support a 24-hour hotline and Central shelter, serving individuals and families fleeing domestic violence.

REACH Beyond Domestic Violence, Waltham, \$5,000 To support the Prevention and Education program, teaching teens about healthy relationships and domestic violence prevention.

South Middlesex Opportunity Council, Framingham, \$10,000 To implement parenting programs at three short-term shelters 70 families with parents under age 21.

Venturing Out, Wellesley, \$5,000 To teach entrepreneurship courses to prisoners at two correctional facilities, hoping to reduce the recidivism rate.

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.

Arts & Culture Grants

Amazing Things Art Center, Framingham, \$5,000 To support an upgrade of second floor art galleries, increasing sales opportunities for MetroWest artists.

Concord Players, Concord, \$2,000 To purchase new hearing assistance devices for the elderly and hearing-disabled audience, keeping them as active theatergoers.

The Discovery Museums, Acton, \$5,000 To support interactive school programs that enrich the energy, engineering, and design curriculum of state frameworks.

Emerson Umbrella for the Arts, Concord, \$8,500 To support the installation of a new, larger elevator to provide better access for all users and be ADA accessibility compliant.

Music Access Group, Inc., Dedham, \$2,500 To provide an afterschool orchestral string program for 3rd and 4th graders, in partnership with Dedham Public Schools which does not provide elementary music.

Performing Arts Center of MetroWest, Framingham, \$8,000 To pay for a part-time coordinator for afterschool music lessons for 4th and 5th graders in 8 Framingham schools, where elementary music is not provided.

Environmental Grants

Lake Cochituate Watershed Council, Natick, \$4,000 To continue the 37-acre restoration effort with continuing education and environmental programs.

Mass Audubon: Drumlin Farm, Lincoln, \$10,000 To help construct platforms and purchase field equipment for educational programs at the fragile Ice Pond.

Medfield Animal Shelter, Medfield, \$1,000 *To help establish a small in-house spay/neuter clinic to provide affordable cat sterilization services to lower-income pet owners.*

Neponset River Watershed Association, Westwood, \$5,000 *To enable the Association to assist Westwood in meeting EPA MS4 requirements for stormwater runoff.*

Sudbury Valley Trustees, Sudbury, \$1,000 *To go toward the expenses associated with seeking accreditation from the Land Trust Alliance.*

Youth Development Grants

Acton/Boxborough/Harvard/Littleton Early Childhood Council Scholarship Project, Acton, \$4,339 *To fund a preschool scholarship program for local working families.*

Appalachian Mountain Club, Boston, \$2,500 *To support the outdoor Adventure and Deaf Youth Initiative.*

Bear Spot Foundation, Concord, \$2,400 *To support the operation of therapeutic equine psychotherapy services for children.*

Big Brothers Big Sisters of Central MA/MetroWest, Framingham, \$2,500 *To support activities for youth involved in the one-on-one mentoring program.*

Big Brothers Big Sisters of Central Mass/MetroWest, Framingham, \$4,000 *To support training and supervision of mentors to be matched with MetroWest youth.*

Boys & Girls Club of Assabet Valley, Maynard, \$2,600 *To support Homework Power Hour, offering homework help, tutoring, and guidance for low-income children.*

Boys & Girls Clubs of MetroWest, Marlborough, \$4,000 *Toward expansion of the teen leadership program.*

Bridget Brigade Foundation, Winchester, \$3,000 *To fund a crib for a severely brain-damaged youth, and some family financial assistance.*

Camp Starfish, Rindge, NH, \$2,500 *To fund camp attendance for a child from MetroWest with debilitating psychological and learning issues.*

Concord Youth Theatre, Concord, \$1,750 *To support the experiential theater education program.*

The Decibels Foundation, Concord, \$3,600 *To support language curriculum and training for children with hearing loss and their families, working with an early intervention program.*

Friends of Resiliency for Life, Framingham, \$4,000 *To fund individualized support to help high school students graduate and gain college admission.*

Heading Home, Cambridge, \$1,500 *To help provide beds and supplies for a family moving from a shelter into their first apartment through the Up and Out program.*

Home for Little Wanderers, Boston, \$1,000 *To support Waltham House for GLBTQ youth, a community-based group home.*

Jeff's Place, Wayland, \$2,823 *Toward development of a grief curriculum for 3 age groups allowing children and teens to express their feelings through creative activities.*

The Kasiisi Project, Cambridge, \$2,100 *To help bring hydroelectric power to a school in Uganda.*

Kids Connect, Natick, \$2,400 *Toward tutoring for low income students.*

Lovelane Special Needs Horseback Riding Program, Lincoln, \$1,720 *To provide tuition assistance for a special needs child.*

Operation Outreach USA, Holliston, \$3,000 *To provide literacy materials for elementary school students in Dedham and Hudson.*

Rediscovery, Waltham, \$4,339 *To fund a teen financial literacy program.*

Room to Dream Foundation, Newton, \$3,000 *Toward remodeling of a room for a chronically-ill child*

Samaritans, Framingham, \$1,000 *To support the launch of the Youth IM service to provide additional outreach for teens.*

Grants from Donor Advised Funds

A Place to Turn

Acton Community Supper & Food Pantry

Adolescent Consultation Services

Advocates, Inc.

Ashland Emergency Fund

Assabet Valley Little League

Babson College

Beth El Temple Center

Bethany Hill School

Boston Harbor Island Alliance

Boston University WBUR 90.9

Celebration International Church Food Pantry

Charles River Watershed Association

City of Marlborough Heat & Eat Program

Communities United, Inc.

Community Food Share	Open Table, Inc.
Community Therapeutic Day School	Pan-Massachusetts Challenge
Congregation Dorshei Tzedek	PEARS Program in Education
Daily Bread Food Pantry	Programs for People
Dedham Food Pantry	Project Bread-Walk for Hunger
First Parish Wayland	Project Just Because, Inc.
Framingham Adult ESL Program Fund	QLLA Charities
Framingham High School	REACH Beyond Domestic Violence
Friends of the Milford Upper Charles Trail	Sacred Heart Church Food Pantry-Waltham
Fund for Wellesley	Salvation Army-Waltham Food Pantry
Grandma's Pantry	Salvation Army Worship and Service Center
Greater Boston Food Bank	Senior Support Foundation
Holliston Mission Possible	Small Can Be Big
Holliston Pantry Shelf	St. Anne Parish
HOPE Worldwide New England, Inc.	St. Bridget's Food Pantry
Hudson Community Food Pantry	St. Mary's Parish Center
Impact on Education	Stow Food Pantry
Interface - Samaritan	Sudbury Community Food Pantry
J.F. & C.S. Family Table	The Autism Alliance of MetroWest, Inc.
Jewish Family Service of MetroWest	The Bates Fund
Land's Sake	The Discovery Museums
Lexington Interfaith Outreach Food Pantry	The Food Project
Lovin' Spoonfuls	The Learning Center for the Deaf
Lucy & Joe's Food Pantry for Frail Elders	The Rivers School
Lucy MacKenzie Humane Society	Town of Sherborn
Massachusetts College of Pharmacy & Health Sciences	Town of Wellesley
Maynard Food Pantry	United Nations Foundation
Medfield Food Cupboard	United Parishes of Southborough Food Pantry
Medway Food Pantry-Medway Housing Authority	United Way of Tri-County
Medway Village Food Pantry	University of Maine
MetroWest Interfaith Hospitality Network	Villanova University
MetroWest Tourism & Visitors Bureau	Walpole Community Food Pantry
Middlesex Human Service Agency, Inc.	Wellesley Council on Aging
Milford Youth Center	Wellesley Food Pantry
Millis Ecumenical Food Pantry	Wellesley Scholarship Foundation
Minute Man ARC for Human Services	Wentworth Institute of Technology
Natick High School	Westborough Food Pantry
Natick Service Council, Inc.	Westwood Council on Aging
Needham Community Council	Worcester County Food Bank
Nurturing Minds	World Bicycle Relief

2011 Financial Statements

Statement of Financial Position	2011	2010
ASSETS:		
Cash and cash equivalents	\$ 478,014	\$ 378,055
Investments	8,727,547	8,619,095
Unconditional promises to give	1,265,218	217,505
Property and equipment – net	26,495	37,891
Prepaid expenses and other assets	9,487	10,128
TOTAL ASSETS	<u>\$ 10,506,761</u>	<u>\$ 9,262,674</u>
LIABILITIES:		
Accounts payable and accrued expenses	\$ 13,862	\$ 18,018
Grants payable	–	32,430
Fiscal sponsorship funds	–	4,254
Capital lease	8,021	14,680
Agency endowment funds	556,452	568,224
TOTAL LIABILITIES	<u>\$ 578,335</u>	<u>\$ 637,606</u>
NET ASSETS:		
Unrestricted	4,483,714	\$ 3,780,633
Temporarily restricted	3,357,967	2,730,727
Permanently restricted	2,086,745	2,113,708
TOTAL NET ASSETS	<u>9,928,426</u>	<u>8,625,068</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 10,506,761</u>	<u>\$ 9,262,674</u>
Statement of Activities		
SUPPORT AND REVENUE:		
Contributions, grants and gifts	\$ 2,475,175	\$ 759,235
Investment income (loss)	119,756	713,215
Program fees	92,924	87,179
Loss on disposal of property and equipment	–	(1,783)
Net assets released from restriction	–	–
TOTAL SUPPORT AND REVENUE	<u>\$ 2,687,855</u>	<u>\$ 1,557,846</u>
EXPENSES:		
Grantmaking and other program expenses	\$ 1,072,301	\$ 956,942
Management and general	194,957	201,947
Fundraising and development	117,239	141,980
TOTAL EXPENSES	<u>\$ 1,384,497</u>	<u>\$ 1,300,869</u>
CHANGE IN NET ASSETS	\$ 1,303,358	\$ 256,977
ASSETS AT BEGINNING OF YEAR	<u>\$ 8,625,068</u>	<u>\$ 8,368,091</u>
ASSETS AT END OF YEAR	<u>\$ 9,928,426</u>	<u>\$ 8,625,068</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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