

Make a  
world of  
difference  
in your own  
backyard.



FOUNDATION FOR METROWEST

Our foundation is about a tradition of caring.  
It's about making lives better.  
It's about making giving easier.

# It's about MetroWest

The Foundation for MetroWest was established with a simple philosophy: you can make a world of difference in your own backyard.

In November 2009, the Crossroads Community Foundation officially changed our name to **Foundation for MetroWest**. The new name better communicates what we do — connect philanthropic opportunity with demonstrated need in MetroWest. Under our new name, the Foundation for MetroWest continues to 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. Since 1995, we have invested in the people and charitable causes of MetroWest and distributed over \$5 million in grants to the community.

### For donors and other funders:

We are a single, knowledgeable source of information on the needs of the community, which organizations can most effectively meet those needs, and where charitable contributions can have greatest impact

We have proven expertise, an investment committee with a strong track record, and a wide variety of giving options that can maximize your philanthropic goals

## What do we do?

### For the community as a whole:

We are a convener and catalyst...coordinating across communities and among nonprofits to build collaboration, foster shared learning, and reduce redundancies

We play a crucial role in attracting and retaining charitable dollars in the region to create strong, vibrant communities, now and in the future

### For nonprofit organizations:

We provide grants in five key areas: family support, arts and culture, education, environment, and youth development

We help nonprofits build the capacity, visibility, connections, and expertise they need to deliver on their mission

# MetroWest.

## What can you do?

You can help create better lives for members of your community, and we can help make it happen. If you are ready to offer your support, Foundation for MetroWest is ready to become your partner in engaged philanthropy. Call us and let's begin a conversation about your charitable goals.

# Giving Through the Foundation

## The Advantages of a Community Foundation Over a Private Foundation

A community foundation provides greater tax advantages, eliminates record keeping, and provides a professional staff with deep knowledge of the community and its organizations to accomplish the same philanthropic goals.

A community foundation offers flexibility, strong connections with local people, sound grant-making practices, prudent investment strategies, local oversight, and access to a network of more than 700 community foundations across the country.

### Gift

### Benefits

#### Donor-Advised Fund\*

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Donors can establish a donor-advised fund with a minimum of \$10,000 (or an intent to build to the minimum within a specified period of time). You actively participate in recommending grant distributions. Investments, paperwork, and grant monitoring are provided by us.

You receive maximum tax advantage, your charitable dollar is put into effect immediately, and you benefit from Foundation for MetroWest's deep knowledge of the community and charitable expertise.

#### Designated Fund

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This choice ensures that a specific organization or institution that you care about receives the exclusive benefits of your gift in perpetuity. You may contribute to an existing fund or establish your own with a minimum of \$10,000.

Sound stewardship of your contribution by talented investors. Personal service by our staff, with recognition going to you. The Foundation also has the ability to protect donor intent through our variance powers.

#### Field of Interest Fund

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Through a named field of interest fund, donors can focus their gift on an area that is meaningful to them, such as homelessness or animal welfare, or a specific geographic area.

Our staff researches and monitors the organizations that are engaged in the most effective work in your area of interest. We solicit proposals, conduct site visits, and make grants in your fund's name.

#### Unrestricted Funds

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If you would like to invest in the ever-changing challenges of MetroWest communities, unrestricted funds have the greatest potential to support the broad range of needs in the community, now and in the future.

You can establish an unrestricted fund in your name, or your gift can be added to one of the Foundation's existing unrestricted funds, which are described on the following page. Your gift will give the Foundation the ability to continually meet the current and future needs of MetroWest.

\* Advised fund donors are notified each January of the amount available from their endowed fund for grant making for the coming year. In compliance with U.S. Standards for Community Foundations, the Foundation for MetroWest confirms the IRS 501(c)3 status for each organization recommended. Once confirmed, the Foundation directors approve the grant, and checks are sent to the recipient organization in the donor's fund name.

# Areas of Giving

Since its inception in 1995, the Foundation for MetroWest has given away millions of dollars to nonprofit organizations in MetroWest. We ensure that every dollar we grant goes to serve the neediest individuals, as well as support organizations that provide critical services and add significant value to one or more of the communities we serve.

## Family Support

Despite the apparent affluence of many of our towns, poverty, domestic violence, and homelessness are present. Organizations throughout the region are addressing these needs. They work to lift people out of poverty every day, through job readiness training, economic assistance, and emergency shelter.

## Arts and Culture

MetroWest takes pride in its rich cultural history and has a bounty of arts and cultural organizations, from performing arts companies to museums. They are integral to community-building efforts, and are a large part of what makes MetroWest a wonderful place to live.

## Education

MetroWest is home to some of the best-performing schools in Massachusetts, but there are also many underperforming schools. The Foundation for MetroWest is funding programs that work to bridge this achievement gap, and ensure that schools build technical skills that students need to be competitive in the global workforce.

## Environment

While Massachusetts continues to have a wonderful network of green corridors — a mix of towns and open spaces that remind us of our roots in the New England village — in MetroWest, many of our towns face challenges with suburban sprawl, land preservation, invasive species, and water safety. Our grants help organizations that are working to address these challenges so that future generations will continue to be able to enjoy the region.

## Youth Development

The Foundation's youth development funding accomplishes two goals: to provide aid to underserved children in our region and to engage local youth to participate in the decision-making process. Area high school students receive in-depth philanthropy training, review grant proposals, and make funding decisions in conjunction with Foundation staff.

# Engaged Giving: The English Family Fund

“I considered starting my own foundation. I looked at all the possible options and vehicles. I decided against it because of the record keeping and administrative requirements.”

—Ted English, The English Family Fund

Ted English grew up in Milton and moved to Hopkinton in 1986. He and his wife, Maureen, had two children when they arrived in Hopkinton and two while living there. “What is special about MetroWest is that it’s a wonderful place to live and bring up a family. Whether it’s church, athletics, schools — I think the sense of community here and the sense of place it offers provides children the right springboard for life.” As former CEO of TJX in Framingham (the parent company of T.J. Maxx and Marshalls) and current CEO of another company in Connecticut, he established a donor-advised fund at Foundation for MetroWest because he wanted to give back to the community that had provided him and his family with so many opportunities. “I believe it’s important to not take your successes for granted.”

During his time as the head of TJX, he observed the extent of many serious social and economic challenges in the area. “I saw a lot of need in MetroWest that doesn’t get publicized.” He was also motivated because he has an autistic child who has benefited from several organizations in the region. “Raising and living with a special needs child makes you aware that you need other resources from the community. You can’t do it alone.” In organizing his fund, he applied some of his managerial skills to philanthropy. His objectives included involving his family, building on his knowledge of community needs, and being personally engaged in the process. “In the Foundation for MetroWest I found a partner that could do a better job than I could do on my own.” One of the English Family Fund initiatives this year gives \$1,000 a week to organizations supporting families in crisis or special needs populations.

## TED ENGLISH

wants to give back to his community

He establishes a donor-advised fund  
**THE ENGLISH FAMILY FUND**

to benefit many  
organizations in the region:

Boys & Girls Clubs of MetroWest

Household Goods Recycling

Waltham Fields Community Farm



Women of Means

# Giving Later: Tools for Planned Giving

While many donors use community foundation gifts as an estate planning tool — taking advantage of a retirement plan, insurance policy, bequest, revocable trust, or any device that provides funds upon your death or that of a beneficiary — others choose to combine both immediate and planned gifts. Whichever you choose, we help accomplish philanthropic and estate planning objectives in a thoughtful and cost-effective way. We've earned the trust of many professional advisors throughout MetroWest, and the many donors who have come to us through the advice of their financial advisors.

"I didn't want to set up a family foundation because, as an accountant, I know how much hassle it is. With [my] fund, Foundation for MetroWest takes care of many of my philanthropic wishes. With its knowledge, research resources, and staff, the Foundation for MetroWest is in a position to find what satisfies your real objectives now and long after you no longer are here to make these decisions."

— Robert H. Charron, CPA  
Managing Partner, Carlin, Charron & Rosen LLP

## What to Give

Cash  
Appreciated Stock  
Closely Held Stock

Personal Property  
Private Foundation Assets  
Qualified Retirement Plans  
Life Insurance

Bequests  
Charitable Remainder Trusts  
Real Estate

## Tools for Giving

### Bequests

Are there any charitable interests you would like to support in your will? A testamentary gift is the simplest way to make a lasting gift to your community and to significantly reduce your federal and state estate.

You create a legacy that perpetually supports the charitable programs that you cared about during your lifetime.

### Charitable Gift Annuities

A Charitable Gift Annuity is a contract between you and the Foundation. In exchange for your gift of cash or stock, you or your designee receives a fixed annual income. At the end of the term, the remaining assets are passed along to a permanent fund at the Foundation for MetroWest.

We guarantee you or your designee a fixed annual income for life. You can start receiving income immediately or defer payments until a later date.

### Charitable Remainder Trust

Trusts are the option of choice for larger gifts. A Charitable Remainder Trust pays you (and/or a beneficiary) either a fixed or variable income for life or for a fixed number of years. At the end of the term, the "remainder" is transferred to a permanent fund with us.

You benefit from a tax deduction in the year the trust is established and avoid capital gains if the gift used to fund the trust is appreciated property. Assets are removed from the taxable estate and eventually pass to the Foundation to supplement or to establish a fund in your name.

# Preparing the Next Generation: Meg Ramsey

“This is a beautiful part of the world, but many of these young people don’t appreciate how fortunate they are. They aren’t aware that there are many people living in the same town with them who don’t live in comfortable houses and who can’t afford to go to camp or take a weekend ski trip.”

—Meg Ramsey

## The Donor: The Ramsey Challenge Grant

“How do you educate young people to understand philanthropy? I want my children to be aware of the responsibility that goes along with having money. How to educate them? Make them aware?” Those were the questions that led Meg Ramsey to join Foundation for MetroWest’s advisory committee on Youth in Philanthropy. As a former software engineer for Bell Labs and founding member of a start-up technology company, she knows that the world of philanthropy “holds many more intangibles than software development, but it also contains many of the same challenges and questions. What are you going to do with information once you have it? What are you going to measure and why?” Meg’s \$100,000 challenge grant to expand the Youth in Philanthropy program was one way of answering her own questions. The students who sign up for the philanthropy program in their schools (at present there are endowed programs in five MetroWest schools, with single-year programs in others) acquire new skills: they learn the discipline of having to commit their voluntary time; they learn how to read grant proposals from the MetroWest region; how to conduct site visits; how to develop decision-making strategies; and how to moderate respectful discussion among people who disagree. These are both life skills and philanthropic education. “I tell them to ask questions, listen, observe,” says Meg. “I love having the opportunity to be a guest speaker at Youth in Philanthropy program meetings.”

## The Recipient: Concord Academy

“The program Youth in Philanthropy has opened my eyes, not only to many social problems,” observed one Concord Academy student, “but to the many services out there trying to counteract them. In a world where there seems to be an overwhelming amount of sadness and poverty, I learned there are many wonderful organizations and people willing to devote their skills, money, and time to the causes they believe in.”

### MEG RAMSEY

wants to educate children about the importance of philanthropy

She gives a challenge grant to support **YOUTH IN PHILANTHROPY** a program offered in many MetroWest schools



Youth in Philanthropy is a hands-on, 12-session program that teaches high school students the fundamentals of grant making, fundraising, and the nonprofit world. The Foundation for MetroWest partners with area schools to facilitate this program

# A Portrait in Giving: Susan Carls Churchill

“When I worked in Silicon Valley I saw a lot of people buy Lamborghinis instead of thinking about how to make their money work in more meaningful ways. I was so busy I didn’t have time to focus on philanthropy, but my Merrill Lynch advisor suggested I open a donor-advised fund with Foundation for MetroWest using some of the stock I got when Yahoo! went public. I think it’s been one of my best investments.”

—Susan Carls Churchill

## SUSAN CARLS CHURCHILL

meets with her financial advisor and gives a gift of appreciated stock to establish

## THE CARLS FUND

to serve education and global health organizations:

Heifer Project International  
Lafayette Elementary School (Colorado)



The Walker School

## The Donor: The Carls Fund

For Susan Carls Churchill “home” was growing up in Wayland. Although she now lives in Boulder, Colorado, where she is raising a family of her own and engaged in another high-tech start-up, she loves the MetroWest area and frequently returns to visit. “I think growing up in a community like Wayland gave me a head start in life. My parents imparted a strong sense of philanthropy when we were growing up, and now, when we all get together at Christmas, we decide where we want our donations to go.” With a special interest in the areas of mental health and global health, Susan asked Foundation for MetroWest to identify a school or institution that is an innovator in providing mental health services. “I wanted a program that helped the family as well as the individual. The staff at Foundation for MetroWest helped me find the Walker School. One of the great advantages of Foundation for MetroWest for someone like me is that they really know what works well and which organizations to support.”

## The Recipient: The Walker School

The Walker School in Needham has pioneered programs in mental health that focus on skills, achievement, and competence in children with mental disabilities. Its program places emphasis on keeping children in their homes, working with families, and helping children remain in their own public school system. “What’s great about the Foundation for MetroWest is they pay attention to the people they give to,” notes Dr. Rick Small, Executive Director of the Walker School. “Susan Churchill came to visit. And she will again. It’s more than just sending out a check. Their process itself opens doors to the community.”

# Giving to Educate a Region: Bob and Amy Rands

“Joining the Board of the Foundation opened my eyes to many of the needs in the MetroWest community. My wife and I began to think about how our giving could make an impact in our own community.”

—Bob Rands

## The Donors: Bob and Amy Rands

Bob and Amy Rands have lived in MetroWest for most of their lives.

Amy Rands is a retired risk manager, Bob an investment manager.

In 2004, Bob joined the Board of the Foundation for MetroWest. While previously he and his wife always supported local organizations, much of their giving was to organizations in Boston. Through the Foundation, they began to learn more about the needs of the community. Since both are passionate about education, when the Foundation for MetroWest decided to set up an area fund for education, the Rands chose to make a leadership gift to the fund.

## The Recipient: The MetroWest Fund for Education

“In addition to their donation, Bob and Amy have been involved in setting up the scope for the fund. One of the first pieces of this consisted of evaluating the needs in MetroWest and where the Foundation’s funding could make the most impact. The Rennie Center in Cambridge partnered with the Foundation on this. “Many people see that some of the highest-performing schools in the state can be found in MetroWest and then assume that there is no need,” explains Amy. “In reality there are some extremely low-performing schools as well. The Foundation for MetroWest’s area fund for education will allow those schools to develop strategies to narrow the gap and ensure that all children in our region have access to quality public education.”

### BOB AND AMY RANDS

decide to make a difference in the region by making a leadership gift to

### THE METROWEST FUND FOR EDUCATION

a new area fund that will support education initiatives in the MetroWest region





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