

2018 annual report

passion.
partnership.
perspective.



Dear Friends,

In 1995, our first year of grantmaking, the Foundation for MetroWest awarded \$57,000. In 2018, contributions from MetroWest residents and businesses such as yourself made it possible for the Foundation to distribute over \$1.5 million dollars in grants to local nonprofit organizations doing critical work in our communities.

The impact of those grants highlights the needs in our community and is a testament to the value of our work in our region, and our role as a grantmaker. But the role of a Community Foundation is greater than just grantmaking. A community foundation represents a wide variety of ideas and interests of individual donors who have united in a common purpose - the bettering of their community – both now and in perpetuity. A vehicle for people of all means to make a lasting difference, together.

We act as a connector and an educator, funder and ally. Seeking out the often hidden needs in our backyard, and finding those who are working diligently and effectively to address them. But we believe we can do more. In the coming year, we will be embarking on a massive community needs assessment that we believe will benefit the work of all those who live in, work in, or love our region. The end result will be a public resource-celebrating the strengths and shining a light on the challenges in MetroWest and allowing us all to be better equipped for the future.

As we enter 2019, we must say thank you to Dave Shuman, who is retiring from the Foundation for MetroWest Board of Trustees, as well as Patty Gannon, and our Board Chair, John J. O’Neil III, who are becoming Trustee Emeritus. Your leadership and wisdom have been instrumental in furthering our mission, and we are grateful for you.

And lastly, we thank you. Your confidence in our work inspires us each and every day, and we appreciate your partnership. This annual report celebrates what we have accomplished together this past year and helps us to lay a solid foundation for the future.

Sincerely,



Judith G. Salerno
Executive Director

2018 Impact

Grantmaking

In 2018, we distributed over **\$1.5 million in grants throughout MetroWest** in the areas of Arts & Culture, Environment, Family Support, Hunger Relief, and Youth Development.

More than 1,800 students have graduated from the Youth in Philanthropy program since 1997. In 2018, we ran 16 programs which **distributed \$121,000 in grants to Youth Serving Organizations.**

Youth in Philanthropy

Center for Philanthropy Education

In 2018, **770 nonprofit professionals from 643 organizations** across the region attended our Center for Philanthropy Education (CPE) offerings.

We welcomed a new Town Fund to the Foundation for MetroWest in 2018, The Sherborn Fund. Initially established in 1994 in anticipation of the town's 325th anniversary celebration, **the Sherborn Fund is a permanent endowed fund to support activities and projects that contribute to the quality of life in Sherborn.**

New in 2018

The Women's Philanthropy Speaker Series was launched this year, covering numerous topics of interest such as family philanthropy, hunger relief, and how to get more involved in causes you are passionate about. Almost 100 women from across the region participated in this 5 part series.

2018 Supporters of the Foundation

The Foundation for MetroWest acknowledges and thanks the many individuals and corporations that support our work with generous financial contributions that allow us to serve as a philanthropic resource to the MetroWest community.

FUNDS AND EVENTS THAT DIRECTLY SUPPORT THE WORK OF THE FOUNDATION:

Annual Fund
Community Leadership Breakfast
Spring Inspiration Breakfast
20/25 Endowment Fund
Center for Philanthropy Education Endowment Fund
MetroWest Fund for Arts & Culture
Metrowest Fund for Environment
Metrowest Fund for Families
MetroWest Fund for Youth Development
MetroWest Hunger Relief Fund
Youth in Philanthropy Endowment Funds

CHAIRMAN'S CIRCLE (\$100,000 AND ABOVE)

Shari and Tom Crotty
Sarah Garland-Hoch and Roland Hoch
Anonymous (2)

LEADERSHIP CIRCLE (\$50,000-\$99,999)

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Anonymous

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(\$25,000-\$49,999)

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Patty and Paul Gannon
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The Rands Family Foundation
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(\$5,000-\$9,999)

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 Wei Zhang
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FUNDS OF THE FOUNDATION

Unrestricted Funds

Trustees and Advisors Fund
 20/25 Endowment

Affiliate Funds

Support a variety of agencies and programs within a specific community
 Community Endowment of Lexington
 Medfield Foundation Legacy Fund
 Southborough Community Fund
 The Sherborn Endowment Fund
 The Fund for Wellesley
 The Fund for Wellesley - Al Robinson Fund for the Arts

Designated Funds

Support specific agencies and programs
 Ashland Town Emergency Fund
 Bea and Woolsey Conover Fund
 Conover Sustainability Fund
 Concord Common Weal Fund
 Cummings MetroWest ESL Fund
 First Parish Church in Wayland Fund
 Foxboro Music Association Fund
 Gannon Fund for Youth Development
 Maynard Education Foundation Fund
 MetroWest ESL Fund
 New Era Fund
 OUT MetroWest, Inc. Fund

Donor Advised Funds

Provide grants based on regular advice by the donors
 A Path Ahead Community Fund
 Adam Gurley-Green Memorial Fund
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 Brack Family Fund
 Brennan and Cianciolo Family Fund
 Carls Fund
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 Crosier Family Fund
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 Dover Church Youth Fund
 English Family Fund
 Gannon Family Fund
 Garry & Elaine Holmes Charitable Fund
 Harte Family Fund
 Helen & Miner Cray Fund
 Herbert and Esther Atkinson Fund
 Jacqueline Gannon Fund
 James W. and Patricia T. Poitras Fund
 Kenney Family Fund
 Lagniappe Fund
 Lawrence Family Fund
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 Pattillo Magpie Fund
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 Poitras Memorial Fund
 Rands Family Fund
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 Rylee Fund
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Sherborn Fund
 Sophia R. Lesser Fund
 The James Jay Lavoie Memorial Fund
 The Tower Fund
 The Z Fund
 Thompson Family Fund
 The Yale Appliance Charitable Fund
 USA 500 Clubs Giving Circle Fund

Field of Interest Funds

Support a variety of agencies and programs with the goal of addressing specific issues
 A Path in the Woods Fund
 Ernestine and Josephine Sigmund Fund
 Jackson Youth and Community Fund
 Metrowest Watershed Preservation Fund
 Sudbury Sportsman's Fund

Nonprofit Agency Funds

Support the operations and programs of specific agencies
 Adolescent Consultation Services Fund for the Future
 Assabet Valley Mastersingers Endowment Fund
 Bridge of Central Massachusetts Fund
 Charles River Center Endowment
 Community Therapeutic Day School Endowment Fund
 Discovery Museums Fund
 Framingham Adult ESL Fund
 Garden in the Woods Fund
 Heritage Chorale Fund
 Land's Sake Fund
 Learning Center for Deaf Children Fund
 Maynard Community Chest Endowment Fund
 Medway Foundation for Education Fund
 Metro West YMCA

Scholarship Funds

Support MetroWest students continuing their education
 Brendan Petry Memorial Scholarship Fund
 The Bruce Scholarship Fund
 Dr. Michael & Mary Costrino Memorial Scholarship Fund
 Edward L. Riley Memorial Scholarship Fund
 The Ernie Peltier Scholars Fund
 Gillian Tara Shor Fund
 James C. Peckham Scholarship Fund
 Jason Balfour Memorial Fund
 Juniper Fund
 Lt. William J. Cavanaugh, Jr. Memorial Scholarship Fund
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 Newton South High School Alumni Gift Fund
 Rachel Manoli Scholarship Fund
 Sister Mary Dee Ellis Memorial Scholarship Fund
 Stephen C. Massey Scholarship Fund
 Susan Wornick Journalism Scholarship Fund
 Technology Leadership Legacy Scholarship
 Tiberio Natick High School Scholarship Fund

**Every effort was made to accurately reflect each supporter. If you find an error in the list, please accept our apology and contact our Development Office at 508-647-2260.*

2018 Financial Statements

Statement of Financial Position

	2018	2017
ASSETS:		
Cash and cash equivalents	\$ 1,082,667	\$ 1,384,627
Investments	18,789,901	18,438,717
Unconditional promises to give	2,612,115	2,907,027
Prepaid expenses and other assets	13,804	9,378
Property and equipment – net	10,182	7,241
Operating Lease Asset	191,173	242,081
TOTAL ASSETS	<u>\$ 22,699,842</u>	<u>\$ 22,989,071</u>
LIABILITIES:		
Accounts payable and accrued expenses	\$ 26,257	\$ 10,680
Grants payable	20,000	–
Operating lease liability	191,173	242,081
Agency endowment funds	686,142	721,506
TOTAL LIABILITIES	<u>\$ 923,572</u>	<u>\$ 965,267</u>
NET ASSETS:		
Unrestricted	\$ 16,181,794	\$ 15,518,192
Temporarily restricted	3,967,841	4,878,977
Permanently restricted	1,626,635	1,626,635
TOTAL NET ASSETS	<u>21,776,270</u>	<u>22,023,804</u>
TOTAL LIABILITIES AND NET ASSETS	<u>\$ 22,699,842</u>	<u>\$ 22,989,071</u>

Statement of Activities

	2018	2017
SUPPORT AND REVENUE:		
Contributions, grants and gifts	\$ 3,326,914	\$ 4,451,137
Investment income	(1,207,455)	2,372,959
Program fees	(12,155)	6,913
Special events	503,580	430,129
In-kind contributions	–	–
Net assets released from restriction	–	–
TOTAL SUPPORT AND REVENUE	<u>\$ 2,610,884</u>	<u>\$ 7,261,138</u>
EXPENSES:		
Grantmaking and other program expenses	\$ 1,880,063	\$ 1,778,323
Management and general	420,392	348,548
Fundraising and development	557,963	670,788
TOTAL EXPENSES	<u>2,858,418</u>	<u>2,797,659</u>
CHANGE IN NET ASSETS	(247,534)	4,463,479
NET ASSETS AT BEGINNING OF YEAR	<u>22,023,804</u>	<u>17,560,325</u>
NET ASSETS AT END OF YEAR	<u>\$ 21,776,270</u>	<u>\$ 22,023,804</u>

2019 Board of Trustees

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Our Committees are made up of professionals from a wide variety of disciplines. Each sits on a committee that best reflects their area of expertise. (Committee Lists as of 7/31/19)

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