



REUNITE REBUILD RECOVER

2021 Annual Report



FOUNDATION FOR METROWEST

Dear Friends,

As we reflect on 2021 it was certainly a year with significant challenges but it was also an opportunity to step back and be appreciative for how our community came together to support each other. While the specific challenges varied, one constant was the sense of unity and collaboration among our partners.

As your community foundation serving 30+ MetroWest communities, you can be confident that we are well equipped to identify the areas of greatest need and respond promptly. For us, it starts with the information from Impact Metrowest, our data indicators project, as well as conversations with key stakeholders. Members of our communities rely on us to work together to translate data into action—to ensure everyone can meet their basic needs.

We are motivated by the challenges in our region, and we are taking action. In this Annual Report we are proud to share our progress and highlight some of our partners. Thank you for joining us in this important work as we look forward to what 2022 and beyond will bring, thanks to your continued support.

Sincerely,



A handwritten signature in blue ink, appearing to read 'Jay Kim'.

Jay Kim
Executive Director



A handwritten signature in blue ink, appearing to read 'Mike McAuliffe'.

Michael G. McAuliffe
Board of Trustees, Chair

Impact in 2021

The Foundation for MetroWest improves the quality of life in 30+ MetroWest communities by providing financial and educational resources to nonprofit organizations, collecting and sharing essential data about our region to inform decisions, and partnering with donors to help guide and align their giving with the areas of greatest need in the community.

In 2021 we responded to the needs in our region in a variety of ways—we are proud to share some of the highlights with you. **For more detailed information, visit foundationmw.org.**

Grants
\$3.9
million

Nonprofits
450+
received funding

People Served
500k
benefitted from grants

Programs

Center for Philanthropy Education • Emerging Leaders Academy
Youth in Philanthropy • Board Matching

2021 Funding Priorities



ONEmetrowest Fund



COVID-19 Relief



Arts & Culture



Environment



Human Services



Hunger Relief



Youth Development



Equity in Education



Town Funds

Youth in Philanthropy

11 different programs

Sudbury (2), Needham, Natick, Wellesley, Hopkinton, Wayland,
Concord Academy, Middlesex, Nashoba Brooks, Fenn School

200 students from
19 cities/towns

\$110k in grants to
32 nonprofit organizations

Making a Difference with the Foundation for MetroWest Donor-Advised Fundholder Spotlight



“I have had the opportunity to see the positive impact we can have in the MetroWest region as a member of the Foundation for MetroWest’s Grant Distribution Committee—and it’s inspiring. After years of serving on this committee, it was natural for me to open my Donor-Advised Fund (DAF) at the Foundation. Establishing a DAF that supports MetroWest communities and the Foundation’s mission was an integral component of my strategy as I was planning for the future. Opening a DAF with the Foundation was an easy decision because I feel so passionate about the work the Foundation is doing throughout our region. The staff has in-depth knowledge about local nonprofit organizations and current needs. They are experts. The staff’s input enables me to channel my philanthropy to areas where I am most passionate and keeps me informed where the needs are the greatest. I rely heavily on the team’s recommendations to help guide my philanthropic decisions. We have a true partnership.

The DAF also provides an opportunity for me to deepen my awareness about local nonprofits which I can build on after I retire. It is important for me to support the MetroWest region now and for future generations, and my DAF fulfills that objective.

Creating a DAF at the Foundation enables me to leave a legacy, utilize tax planning strategies, and have the confidence that my philanthropic giving is impactful and aligned with my preferences. We all want to be associated with others who we admire and respect, and that is how I feel about the Foundation’s staff. I view my DAF and relationship with the Foundation as a long-term commitment and look forward to all we can accomplish together throughout our MetroWest communities.”

Maureen Maas

The Foundation for MetroWest is grateful for Maureen Maas’ continued partnership. **To learn more about the Foundation’s Donor-Advised Funds or our other fund options, visit foundationmw.org.**

Donor-Advised Fund

Our Donor-Advised Funds are a partnership that benefits donors and also gives back to the community.

This special giving vehicle is like a **philanthropic bank account** established for the sole purpose of supporting nonprofit organizations.

By opening a DAF with the Foundation for MetroWest, you not only have the potential to grow your charitable dollars through our investment strategy, you also receive 1-1 **guidance and support** from our team of **local philanthropic experts**.



Honoring the Legacy of Robert Brack (1938 – 2021)

Bob was devoted to the MetroWest community and has left a legacy that will benefit our region for generations to come. He has impacted countless lives.

We cherish his lessons—they guide us as we continue our work.

Robert Brack

Trustee, Board Chair and Trustee Emeritus
(2004 – 2021)

2021 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:

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

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

Bea and Woolsey Conover
Louis and Hope Crosier
MathWorks
Tom and Shari Crotty

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

Amelia Peabody Charitable Fund
Anonymous
Klarman Family Foundation
Leslie and Colin Masson
Jack and Carol O'Neil
Roland Hoch and Sarah Garland-Hoch
Margaret Ramsey and John McCluskey

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

Jeffrey Choney and Pam Dippel Choney
The English Family Fund
Gannon Family Fund
Garry and Elaine Holmes
The Rands Foundation

PATRON (\$10,000-\$24,999)

ArcLight Capital Partners
Herbert & Esther Atkinson Fund
Shuana and Jerrold Cohen
Beth and Todd Cook
Helen and Miner Crary Fund
Susan and David Elliott
Loren and Jeff Feingold
Andrew and Elizabeth Gallinaro
Anne Grape
R.W. Holmes
Hopkinton Country Club Charitable
Foundation
Susan Hurwitz and Miguel Lessing

Susan and Brian Kavoogian
Pamela and Steve Lesser
Michael and Peggy McAuliffe
Ann and Peter McAvinn
Middlesex Savings Bank
Christine and Michael Miller
National Development Associates
of New England, LP
Needham Bank
Oasis Systems
Oechsle Family Foundation
Janet and John Pattillo
Brack Family Fund
Rubin and Rudman, LLP
SVN | Parsons Commercial Group, Inc.
The TJX Foundation, Inc.
The Village Bank
Lilly and Edward Yun

FOUNDER (\$5,000-\$9,999)

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Ballentine Partners, LLC.
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Bowditch & Dewey, LLP
Brandeis University, The Sillerman Center
for the Advancement of Philanthropy
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The Fenn School
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Hoang Fund
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Justine and Jim Mullen
Northern Trust
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Morgan Stanley
Andrea Sussman and Andrew Troop
David and Jennifer Swartz
Robin and Perry Traquina
Vanasse Hangen Brustlin, Inc
Jessica and Peter Walter
The Yale Charitable Foundation

FRIEND (\$1,000-\$4,999)

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Holly and Richard Bonomo
Brookline Bank
Brown Advisory
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David Capobianco
Carruth Capital LLC
Sue and Robert Carson
Maria and Adam Chase
Coan Heating & Air Conditioning
Ann and George Colony
Miriam Leaser and Robert Cooper
Daphne and John Cunningham
Dedham Institution for Savings
Deland, Gibson Insurance Associates, Inc.
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Brenda and Peter Diana
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Kitty and Paul Gerry
Rita Goldberg and Oliver Hart
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Jennifer and Patrick Guadiz

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Hologic Charitable Fund
Insource Services
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Maurice and Luly Samuels



A Place To Turn • • • • •

"Thanks to a \$35,000 grant from the Foundation's Emergency Relief fund we were able to distribute gift cards to over 375 households. These cards could be used at two local ethnic grocery stores in Framingham that are within walking distance of many of our clients."

Nils Sandell
Sara and Michael Schnitzer
John Schwarz
Jacqueline and Peter Segall
Daniel Shea
Helene Handelsman Simon
Dale and Peter Sinesi
Holly and John Steiger
Stonegate Group
Craig and Weslie Surman
The N&D Group
Towerwall, Inc.
Tufts Health Plan
Susan and Stanley Twarog
Christopher Visvis
Walker Development & Construction
Management
Andrea and Thomas Ward
Washington Trust Company
Doug Waybright
Wegmans Food Markets INC.
Holyoke and Joanne Whitney
Donald Wiggan

SUSTAINER (\$250-\$999)

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Mary Antes
Lisa Bagshaw
Doreen and Richard Francis Barron
Laura and Dan Barry
Molly and John Beard
Stephen and Cathy Beckman
Ellen and Sandy Bendremer
Bhukhanwala Family Charitable Fund
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Michael Blank
Bonazzoli Corporation
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Amy and Tim Caffrey
Jodi and Kenton Chase
Art Chaves
Abigail and William Churney
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Janise and Martin Cohen
Cheryl Corman
Heather and Brendan Coughlin
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Mary Crowley
D.S. Yarckin Electric, Inc.
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David Zaltas
Michele and Mark DeOliveira
Rueith Diamond
Sandra and Garth Dickie
Molly Donovan
Jacqueline Drapeau
Drew and Kiki Shilling
Sean and Karen Edwards
Stephen Elkind
Anat Engel
Jennifer and Erik Sirri
Nancy and Dean Falb
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Lisa and Steven Finkel
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Carolyn Flood
Steven and Andrea Frank
Kappy Freund
Neil Frieband
Andrew and Kelly Friendly
Katherine Garrahan and Robert Distel
Jennifer and Kevin Gillis
Kelsey Gosselin
Graham Holdings-JK Group T
Carolyn and Nicholas Guttilla
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Rob Oppenheim
Deborah Oppenheimer and Cliff Romash
Caren and Randy Parker
Lynn Petrasch
Gretchen Pfuetze
Barbara Pike
Michelle Potter
Barbara and Frederick Pryor



DOC WAYNE

Doc Wayne Youth Services • • • • •

"Despite the immense challenges of the pandemic, support from the Foundation for MetroWest helped us to continue delivering intentional, consistent clinical services to 250 students who needed us. We were able to further adapt to serve our clients by developing a comprehensive packet of activities that could be administered remotely."

Dian Quinn
Rhoni Rakos
Thomas Renyi
Sara and John Rex
Kathi and Robert O'Neil
Erin Rodat-Savla and Ashesh Savla
Hope and Steve Rubin
Doris Rubin
Judy and Anthony Salerno
Erica and William Scatchard
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Culver Smith
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Jill and Michael Stansky
Heather and Alex Stephens
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The Thorson Foundation
Unitarian Universalist Society of
Wellesley Hills
Erin Walder
Robert Walter
Nancy Westborn
Michael Whitworth
William McAvoy

Audrey and John Williams
Howard Wolk
Shalini and Prem Yerabothu
Alison Zetterquist
Ginia Ziobro

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Ailene Barry
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Paulette and James Batson
Bethany Bayer
Lisa and David Bell
Zoey Bergstrom
Carole Berkowitz
Holly and Chris Bernene



Hope & Comfort • • • • •

“Funds from the Foundation for MetroWest enabled us to deliver nearly 2 million hygiene products in 2021 alone, which includes a very significant footprint in many MetroWest communities. Thanks to the Foundation for this generous support and recognition of hygiene as a basic need. A chronic lack of access to hygiene products impacts one’s wellbeing—providing these has such a significant impact!”

Alfred Bertoline
Nancy Blair
Laurie Blank
Liz and Neil Blicher
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Jeremy Glenn
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Nancy and Christopher White
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Rosemary Wilson
Jennifer Wise
Jane and Joseph Wojcik
Brahm Jonathan Yachnin
Kathryn Youngen
Christine Youngren
Barbara Yuan

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David Adler
Dinah Adler
Leila Sabine Marie-Claire Ahmed

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 Evy Alloway
 Srikanth Ammu
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 Ronit Velde
 Tanay Venkata
 Saketh Venkata
 Sam Ventura
 We're All In This Together
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 Kate Willey
 Pamela Williams
 Willows Residents Fund
 Katie Wright
 Douglas Yuan
 Trina Zarski

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.



Waypoint Adventure

"The grant provided 50 partial scholarships and removed financial barriers to participation for youth with disabilities so they could get outdoors. We helped change mindsets about what people with disabilities can do, provided experiences that make participants socially relevant, and built confidence. Thank you for making this, and many more opportunities possible."

2021 Financial Statements

STATEMENT OF FINANCIAL POSITION

2020

2021

ASSETS

Cash and cash equivalents	\$ 1,476,975	\$ 813,322
Investments	\$ 24,291,448	\$ 29,247,885
Unconditional promises to give	\$1,783,999	\$ 918,683
Prepaid expenses and other assets	\$ 16,756	\$ 26,353
Property and equipment – net	\$ 13,195	\$ 5,457
Operating lease asset	\$ 82,642	\$ 24,824

TOTAL ASSETS

\$ 27,665,015

\$ 31,216,524

LIABILITIES

Accounts payable and accrued expenses	\$ 11,562	\$ 11,486
Grants payable	\$ 40,000	\$ 85,000
Operating lease liability	\$ 82,642	\$ 24,824
Agency endowment funds	\$ 915,722	\$ 1,030,245

TOTAL LIABILITIES

\$ 1,054,755

\$ 1,198,522

NET ASSETS

Unrestricted	\$ 21,449,426	\$ 24,282,298
Temporarily restricted	\$ 3,534,199	\$ 3,744,569
Permanently restricted	\$ 1,626,635	\$ 1,991,135

TOTAL NET ASSETS

\$ 26,610,260

\$ 30,018,002

TOTAL LIABILITIES AND NET ASSETS

\$ 27,655,015

\$ 31,216,524

STATEMENT OF ACTIVITIES

2020

2021

SUPPORT AND REVENUE

Contributions, grants and gifts	\$ 5,571,615	\$ 5,344,170
Investment income	\$ 1,782,431	\$ 3,008,199
Program fees	\$ 9,409	\$ 10,062
Special events	\$ 285,055	\$ 349,432
In-kind contributions	–	–
Net assets released from restriction	–	–

TOTAL SUPPORT AND REVENUE

\$ 7,648,510

\$ 8,715,613

EXPENSES

Grantmaking and other program expenses	\$5,219,287	\$ 4,232,393
Management and general	\$ 472,749	\$ 481,167
Fundraising and development	\$ 450,536	\$ 594,311

TOTAL EXPENSES

\$ 6,142,572

\$ 5,307,871

CHANGE IN NET ASSETS

\$ 1,505,938

\$ 3,407,742

NET ASSETS AT BEGINNING OF YEAR

\$ 25,104,322

\$ 26,610,260

NET ASSETS AT END OF YEAR

\$26,610,260

\$ 30,018,002



2nd Annual
ONEmetrowest
Day
Friday,
October 29, 2021





FOUNDATION FOR METROWEST

MetroWest Nonprofit Board Matching Program

A Foundation for MetroWest program designed to strengthen our region

Launched in 2021, the MetroWest Nonprofit Board Matching Program was designed to help strengthen our region by matching engaged corporate leaders and rising stars with nonprofit board opportunities in the MetroWest region.

- Six-session training program includes partnerships with industry experts in fundraising, governance, and nonprofit finance.
- 100% of participants were matched and are currently serving on a nonprofit board. Our 2021 nonprofit board matches included: Circle of Hope, Cultural Alliance of Medfield, Doc Wayne Youth Services, Waltham Partnership for Youth, and others.

"We know our Bowditch & Dewey community is rich with talented individuals ready and willing to serve on nonprofit boards, but we found that many of these individuals did not know where to connect with organizations whose mission and needs aligned with their personal values and skills. Participants not only feel more prepared to take on board leadership roles because of the in-depth curriculum, but they have built personal connections through the Foundation's program, leading to great matches and meaningful commitments."

Katherine Garrahan, Bowditch & Dewey



For information about the 2022 Board Matching program that begins in September, contact Renee Quinn at rquinn@foundationformetrowest.org.



THANK YOU FOR DOING WHAT YOU DO

Like you, valuing our communities is at the heart of all we do. Keep up the good work!



TJ-maxx

Marshalls

HomeGoods

SIERRA

WINNERS

HOMESENSE

TJ-maxx



*Thank You
Foundation For MetroWest
For Your Leadership in
Creating Strong, Vibrant
MetroWest Communities*

COMMUNITY

R.W. HOLMES
COMMERCIAL REAL ESTATE



RIGHT THERE WITH YOU

SUPPORTING THOSE WHO MAKE A DIFFERENCE

As a mutual bank, our focus is to support the community and give back in ways that help everyone live better. We are proud of our 20+ year relationship with Foundation for MetroWest and look forward to many more years of supporting the community together.

Learn more at www.middlesexbank.com/giving-back

 **Middlesex
Savings Bank®**
right there with you

MEMBER FDIC

**Making a difference in
our own backyard.**
Thank you Foundation for MetroWest



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