



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,



Jay Kim Executive Director



Michael G. McAuliffe Board of Trustees, Chair

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.**



200 students from 19 cities/towns

\$110k in grants to32 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

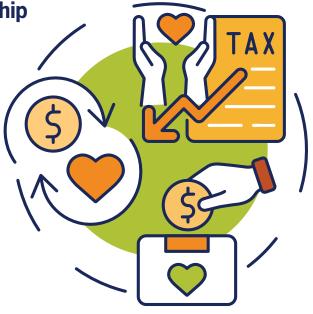
The Foundation for MetroWest is grateful for Maureen Maas' continued partnership. To learn more about the Foundation's Donor-Advised Funds or our other fund options, visit foundationmw.org.

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) 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 Fund for Youth Development MetroWest Hunger Relief Fund Spring Inspiration Breakfast Youth in Philanthropy Endowment Funds

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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 Wiggin

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C 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 Renvi 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 Sheldon Family Kristin and Jun Shirahama Robin Slonim and Paul Allen Culver Smith Christie Soligon Jill and Michael Stansky Heather and Alex Stephens Leslie and John Stonestreet Nancy Styron The Thorson Foundation Unitarian Universalist Society of Wellesley Hills Erin Walder Robert Walter Nancy Westborn Michael Whitworth William McAvov

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

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HOPE&

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!"

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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 Investments Unconditional promises to give Prepaid expenses and other assets Property and equipment – net Operating lease asset TOTAL ASSETS	\$ 1,476,975 \$ 24,291,448 \$1,783,999 \$ 16,756 \$ 13,195 \$ 82,642 \$ 27,665,015	\$ 813,322 \$ 29,247,885 \$ 918,683 \$ 26,353 \$ 5,457 \$ 24,824 \$ 31,216,524
LIABILITIES Accounts payable and accrued expenses Grants payable Operating lease liability Agency endowment funds TOTAL LIABILITIES	\$ 11,562 \$ 40,000 \$ 82,642 \$ 915,722 \$ 1,054,755	\$11,486 \$85,000 \$24,824 \$1,030,245 \$1,198,522
NET ASSETS Unrestricted Temporarily restricted Permanently restricted TOTAL NET ASSETS	\$ 21,449,426 \$ 3,534,199 \$ 1,626,635 \$ 26,610,260	\$ 24,282,298 \$ 3,744,569 \$ 1,991,135 \$ 30,018,002
TOTAL LIABILITIES AND NET ASSETS	\$ 27,655,015	\$ 31,216,524
TOTAL LIABILITIES AND NET ASSETS STATEMENT OF ACTIVITIES	\$ 27,655,015 2020	\$ 31,216,524 2021
	<u></u>	
STATEMENT OF ACTIVITIES SUPPORT AND REVENUE Contributions, grants and gifts Investment income Program fees Special events In-kind contributions Net assets released from restriction	2020 \$ 5,571,615 \$ 1,782,431 \$ 9,409 \$ 285,055 	2021 \$ 5,344,170 \$ 3,008,199 \$ 10,062 \$ 349,432





LEADERS





MetroWest Nonprofit Board Matching Program

FOUNDATION FOR METROWEST

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!

WINNERS

FI-MOX Marshalls HomeGoods SIERRA HOMESENSE

TKMOX

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

COMMUNITY





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.

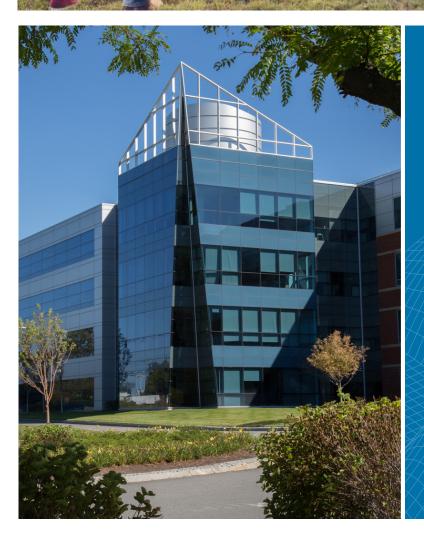
Learn more at www.middlesexbank.com/giving-back



Making a difference in our own backyard.

Thank you Foundation for MetroWest

D NATIONAL DEVELOPMENT



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