

# comm



## 2020 annual report

# Dear Friends,

2020 is a difficult year to capture in words. As we look back on the year, however, there is one word and feeling that arises over and over again: **community**.

Like many of you, we spent 2020 engulfed by the current tragic events—from the loss of nearly two million lives world-wide due to the COVID-19 pandemic, economic turmoil, racial and social justice issues, a presidential election turned violent, and everything in between, 2020 was a year like no other. Yet, amid the anxiety and uncertainty we all felt, the MetroWest community displayed extreme compassion, generosity, and importantly, resilience.

When we think about the significance of having a strong community foundation in the region, there is no better time to reflect on the importance of the Foundation for MetroWest and the work we do. At the beginning of the 2020, we were planning a year long celebration of our 25th anniversary and had no idea that this milestone year would be so pivotal for our work. Not only did we put all celebrations on hold, but we also quickly and efficiently mobilized resources to be there for our most vulnerable neighbors during an unprecedented time of need. In 2020 the Foundation granted over \$4 million in emergency relief funding to our nonprofit partners serving the region. While most of our efforts were geared toward emergency relief, we were fortunate to be able to provide funding to local nonprofits through our Arts & Culture Grant Program, Youth Development Grant Program, and non-covid-related town fund grants. This brought our total impact from giving to nearly \$5 million in 2020, which is almost triple the grantmaking we have done in a normal annual cycle.

What matters most, however, is not the number we were able to give, but the impact of the Foundation's work in the community. We hope this year's annual report will show you just how critical a strong community, bolstered by a strong community foundation, is during the good times and the tough ones. There is power in unity.

We are a region comprised of many different cities and towns, but the love we share for our neighbors is what bonds us together. We are proud of the way the Foundation was able to respond to the urgent and everchanging needs of our region in 2020, and we're humbled to share that with you through the annual report. In the following pages, you will learn how our donors, nonprofit and corporate partners, state and local governments and the community foundation that serves you, came together, despite being apart, to be a resource and support system for our communities.

As we continue to evolve to meet the needs of our region, we invite you to join us on this journey of making MetroWest a place that all neighbors are proud to call home. On behalf of the board and staff at the Foundation, we thank you for trusting us to be a partner and resource.

As of January 1, 2021, our beloved executive director of 15 years, Judith G. Salerno, stepped down from her position. She is now the Executive Director Emeritus and will continue her involvement with the Foundation.

Sincerely,



Jay Kim  
Executive Director



Louis P. Crosier  
Board Of Trustees, Chair

**ONEmetrowest**  
was our largest giving campaign in the Foundation's history. Thank you to the 1,021 donors who supported us.

## A Gift to the Region:

# Impact MetroWest



Confronting the challenges in our region begins with understanding the needs of our community. To celebrate our 25th anniversary, we launched Impact MetroWest, an interactive website that includes over 50 indicators and provides insight into the trends shaping our community over the last decade. The data serves as a report card for the region, but also acts as a spark to drive change.

What we've learned:

In 2014-18, 8% of MetroWest residents were living in poverty, up from 7% in 2000. Of the three regional counties, Worcester had the highest rate, at 10%, followed by Middlesex at 8% and Norfolk at 6%. Waltham had the highest rate, at 11%, with nearly 6,100 residents below the poverty line. The City of Framingham was second highest, at 10%, nearly 6,700 residents.

### People Living In Poverty

### Language Diversity

In 2014-18, 23% of MetroWest residents spoke a language other than English at home, up from 18% in 2000. Framingham, at 40%, has the most language diversity, followed by Waltham and Marlborough, at 34% and 33%. The three localities' rates increased by 11, 7, and 14 points, respectively, since 2000.

As of 2013, about 384,000 acres - or 21% of all land in MetroWest - was deemed "protected." This was a slightly smaller percentage than Massachusetts as a whole (25%).

### Protected Land

### Proficiency of 8th Grade Students In Math

In 2019, 54% of 8th graders were considered proficient in MetroWest, a slight drop from 2018. This was higher than the 2019 statewide rate of 46%. Students in MetroWest from economically disadvantaged backgrounds had a proficiency rate of 26% in 2019, compared to 63% of those who were not economically disadvantaged.

At the beginning of 2021, the Foundation updated Impact MetroWest to include data specific to racial and social indicators. Visit [impactmw.org](https://impactmw.org) for more information.





## Emergency Relief



## OVER \$4 MILLION

In 2020, the Foundation responded to the pandemic by being there for its neighbors during a critical time of need. We were able to quickly mobilize resources to get over \$4 million in relief in the hands of our nonprofit partners that worked with some of MetroWest's most vulnerable neighbors.

Impact areas included: food and basic hygiene assistance, housing support, mental health, basic emergency needs, PPE, remote learning support, and other programs to help the community during this time.

### Funds

- MetroWest Emergency Relief Fund
- Feed Framingham Covid-19 Fund
- Town Fund Emergency Relief Efforts
- Massachusetts Covid-19 Relief Fund Partnership
- 25th Anniversary Grant Program
- Donor Advised Funds



# Community Corner



## Greater Framingham Community Church

Because of the Foundation's financial support, we were able to partner with Framingham Public Schools, Wayland Congregational church and Stop and Shop to support 70 families with fresh grocery bags every other Saturday. This program has been operating for eight months, allowing our church to meet the needs of the community through a population we would not otherwise have contact with. With the generosity of other community groups, we were able to make a significant impact for Framingham families. The clients and families we served were able to have assistance during Covid and we were able to address the food desert that exists, and work to close the gap of hunger insecurity.

- Rev Dr J Anthony Lloyd, Pastor  
Greater Framingham Community Church



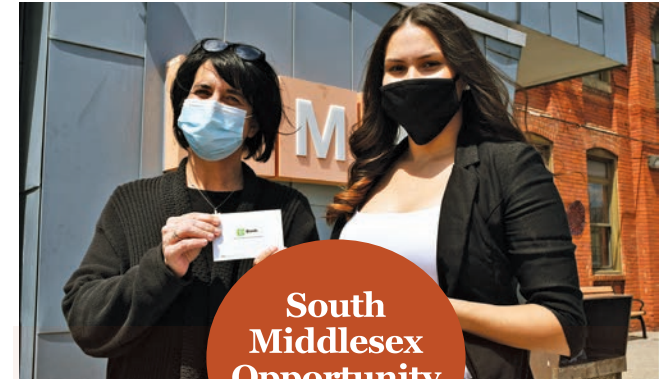
## MetroWest Mediation

A single father of three girls was in the District Court for a non-payment Summary Process action brought upon by the landlord in January 2021. During the intake, he broke down in tears and stated that his soon-to-be ex-spouse was abusing alcohol and drugs that he had to quit his job to be home around his children. And then COVID started, and children all stayed home for school such that he couldn't do much driving-related jobs. His arrears were at over \$17,000 in January 2021.

As of April 2021, this tenant and his children have moved into a new 3-bedroom apartment. With the childcare situation improved for this father, he is actively looking for new jobs through a recruiting agency. All these concerted efforts made it possible for him to have a fresh start and stable housing going forward. It took a three-month effort for this process to work out. Additionally, this tenant had made it clear that he would not want to have an eviction record to impede his future rental prospects. With the solution that parties and mediators have worked out, the prior landlord is willing to dismiss the case against this tenant.

-Seth Izen, Executive Director  
MetroWest Mediation Services

*(details altered to protect confidentiality)*



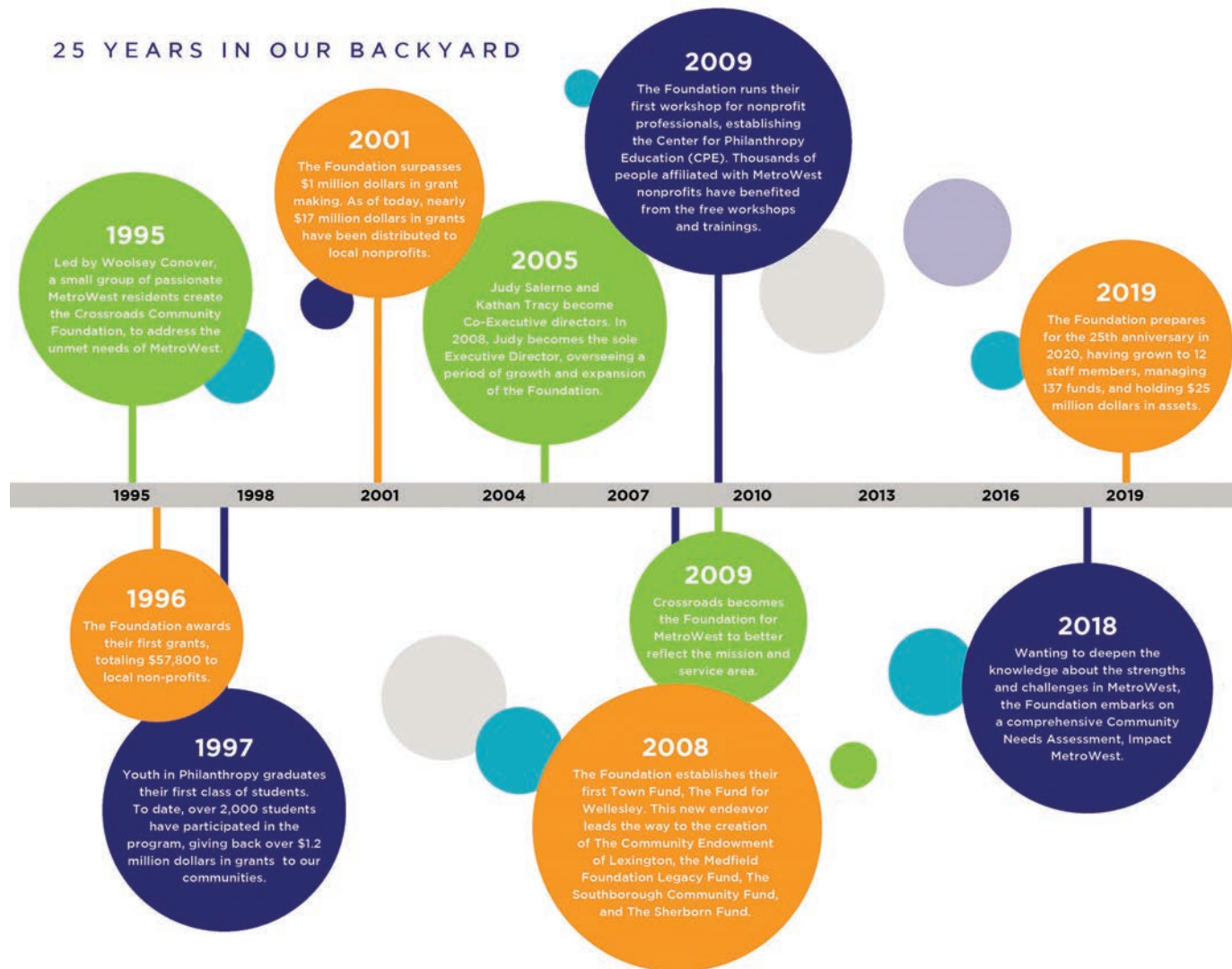
## South Middlesex Opportunity Council

In the fall of 2020, the Framingham Board of Health, through case investigation and contact tracing efforts, noted an increasing number of residents who tested positive with COVID-19 but who struggled to isolate due to financial constraints. In response, South Middlesex Opportunity Council (SMOC) created the COVID-19 Emergency Assistance Fund in partnership with the Framingham Board of Health and local funders, including Foundation for MetroWest. This program is targeted at low income households, some of whom are undocumented, who work hourly jobs where they do not get paid if they do not work.

Since the Fund launched in November 2020, it has provided emergency financial assistance to 83 heads of households in Framingham, representing over 208 family members. Because this financial assistance has enabled these households to quarantine safely without extreme financial repercussions, this has also prevented over 350 coworkers from experiencing unsafe workplace interactions.

-Esther Powell, Director of Resource Development  
South Middlesex Opportunity Council

## 25 YEARS IN OUR BACKYARD



Thank you to MathWorks for being our partner in philanthropy and helping us celebrate our 25th anniversary in the most fitting way possible: being there for our neighbors during a critical time of need.



In 2020, the Foundation turned 25. Originally, we partnered with MathWorks to bring a one-time special video grant program to our local nonprofits. Because of the pandemic, however, MathWorks supported us in pivoting that program by providing each applicant with a \$5,000 anniversary grant to offset the challenges caused by the ongoing effects of COVID-19.

# 2020

## 25th Anniversary

### Arts & Culture

- Cultural Alliance of Medfield
- deCordova Sculpture Park and Museum
- Discovery Museum
- Framingham Downtown Renaissance
- Natick Center Associates, Inc.
- Reagle Music Theatre of Greater Boston, Inc.
- The Center for Arts in Natick (TCAN)
- The Wayside Inn Foundation

### Food Insecurity

- A Place to Turn
- Boston Area Gleaners
- Daniel's Table
- Gaining Ground
- Land's Sake
- Lovin' Spoonfuls Inc
- Needham Community Farm, Inc

### MathWorks Visionary Grant for STEM Education

- Big Brothers Big Sisters of Central Mass/MetroWest, Inc.
- Boys & Girls Clubs of MetroWest
- Milford Youth Center
- The Marlborough STEM Council
- The EcoTarium

### Environment

- Charles River Watershed Association
- Commonwealth Green Low-Income Housing Coalition
- Gore Place Society

### Youth Development

- Boys for the Better
- Community Investors
- Dignity Matters Inc.
- Doc Wayne Youth Services, Inc.
- HeartPlay CareGroup Parmenter Home Care & Hospice, Inc.
- Hoops and Homework
- Hope & Comfort
- Jeff's Place Children's Bereavement Center
- Jewish Family Service of MW
- Mazie Mentoring Program
- Mass Audubon
- Massachusetts Bay Community College
- MetroWest Legal Services
- Minding Your Mind
- Rise Above Foundation
- The Salvation Army
- The Umbrella Community Arts Center
- Waltham Partnership for Youth
- Wayside Youth & Family Support Network

### Family Support

- Advocates, Inc.
- Asperger/Autism Network, Inc.
- Bethany Hill Place
- Employment Options, Inc.
- Family ACCESS of Newton
- Fresh Start Furniture Bank
- Friends of 2Life Communities
- Friends of the Waltham Family School, Inc.
- Jewish Family & Children's Service
- Massachusetts Down Syndrome Congress
- Mental Health Collaborative
- RIA House, Inc. – Ready.Inspire.Act
- The Arc of Massachusetts
- Waypoint Adventure
- YMCA of Greater Boston/ Waltham Branch

We salute our nonprofit partners for the work they were able to do for MetroWest in 2020. There is no community without unity, and 2020 showed us all the power of coming together for our most vulnerable neighbors.



We received a testimonial from one of our clients about what online ordering at our food pantry has meant to her family. She explained that she now has no food waste, and that she can specify what it is that she needs. With now being the second-grade teacher for her son (English is also her second language) not having to wait in a line for groceries and being confident that she will have the foods that she needs to feed her family is a huge improvement. Her ability to place an order online and make an appointment at Open Table was made possible through our Foundation for Metrowest Winterization grant.

-Jeanine Calabria, Executive Director, Open Table

\*\*The nonprofits listed were recipients of our 25th Anniversary Grant. For a full list of nonprofit partners who were awarded emergency relief grants, visit our website at [foundationmw.org](http://foundationmw.org).

## 2020 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  
Annual 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

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### Waypoint Adventures



Waypoint didn't slow down in 2020. The outdoors were still open! Financial support from the Foundation enabled Waypoint to grant much-needed scholarships and adapt our program model and begin offering private lessons and small group adventures. We incorporated social distancing rules and were able to provide in person support to people with disabilities - enabling them to participate in hikes, kayaking, rock climbing, snowshoeing and cross-country skiing during the pandemic.

-Dan Minnich, Executive Director, Waypoint Adventures





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“The Foundation for MetroWest is a very welcoming organization and I feel like a part of their family.

They provide me with a network of like-minded individuals who are very motivated to support our community for years to come.”



**Sue DeRoche**

## Community Advocate, Sue DeRoche

Through her fund, ‘*A Path Ahead Community Fund*,’ inspired by the PBS documentary, *A Path Appears*, Sue has partnered with the Foundation to create a lasting impact within the MetroWest community.



The work of the Foundation is made possible by the generous support of our donors, and we are incredibly grateful that our donors trust us to address the critical needs in the MetroWest community. While there are many ways to give to the Foundation, one special way that contributes to the longevity of the Foundation and our impact in the community is through our Donor Advised Fund (DAF) options.

This special giving vehicle is like a philanthropic bank account, established for the sole purpose of supporting charitable 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.

Below is an interview with Sue highlighting her philanthropic mission, why she chose to work with the Foundation for MetroWest, and why a donor advised fund was the right choice for her charitable contributions.

### What inspired you to get involved with philanthropy and become strategic about your giving?

I was blessed with parents that instilled in me a desire to help others and to be aware of the needs in my community. Throughout my life, while I made small donations and volunteered my time to various causes, I hoped at some point to be able to make bigger contributions. In 2015, I felt a strong need to pull away from the corporate world and spend more time in the nonprofit sector. I recall being mesmerized watching the PBS documentary, *A Path Appears*, and its stories of hope arising out of hopelessness. It inspired me to think of philanthropy as an investment in transforming lives and creating opportunities. My own path became clearer as I pondered who would support local grassroots efforts to help our neighbors rise above poverty if not the members of their own communities. I wanted to be part of that effort in my own backyard.

### Why did you decide to open a donor advised fund with the Foundation for MetroWest?

While I explored forming a small foundation, I found that a Donor Advised Fund would provide the same opportunity for making those investments in my community. Using a DAF would allow me to focus on identifying needs and grant making, leaving the management of my assets to the organization sponsoring my DAF. I researched various sponsors of DAFs but found the Foundation for MetroWest was truly unique and would offer me so much more than asset management and back-office support. The Foundation’s approach with the DAFs they sponsor is to create a partnership in philanthropy.

### What aspects of the work do you enjoy most?

It is so gratifying to see a project fully funded so that it can proceed without delay. There have been several projects where the amount needed to support the project exceeded what I could offer. In one project with Bethany Hill Place, involving important upgrades to Bethany Hill’s elevator, I learned that the Foundation for MetroWest was looking to support a portion of that project. We discussed pursuing joint funding so that the work could begin expeditiously. I love the collaboration between local directors and funders in working to find solutions for our most vulnerable neighbors.





MS Surface Pros purchased with the grant to Thrive Advocacy & Support



A commercial freezer purchased for Daniels Table freezer program



Bedding purchased for New Life Furniture Bank

### What added benefits do you receive from partnering with the Foundation that you really enjoy?

The Foundation for MetroWest is a very welcoming organization and I feel like a part of their family. They provide me with a network of like-minded individuals who are very motivated to support our community for years to come. It has been extremely helpful to brainstorm with the Program Director, Caroline Muphy, about the needs of a specific nonprofit or the state of community needs overall. These discussions allow me to learn about new nonprofits in MetroWest and for me to reciprocate by sharing my knowledge with them. The Foundation for MetroWest has provided several learning opportunities to enhance my due diligence skills and tools to research the fundamentals and financial status of a particular nonprofit. Doing this groundwork in advance of an in-person meeting allows the conversations with the directors and staff to focus more closely on their challenges, needs and strategic plans and ultimately, how I can help.

### Tell us an inspiring story that created action for you in your grantmaking.

My very first grant was a result of a site visit to a foster home. While touring the home, I was troubled while walking down a public hallway to see a teenage boy acting out and being put in gentle restraint to help him calm down. Children in foster homes suffer from anxiety that can only be felt by a child who has been taken away from their family setting and put into a facility with a future unknown. Although a solution to this issue was on their wish list, there was a lack of funding. Working with the staff, we developed a Sensory Room where a child could decompress and be supported in a one-on-one setting with a social worker out of public view. With my grant, we equipped the room with books, music, weighted blankets, fidget gadgets, and traditional sensory tools, as well as alternative calming tools to address anxiety, such as Yoga Nidra. Once completed, I went back to visit and was greeted with hugs from the staff and children who were so appreciative to know someone understood and cared about them.

### What does the future of A Path Ahead Community Fund look like?

I intend for A Path Ahead Community Fund to be a lifelong endeavor. In my heart, I feel everyone should have their basic needs met. They should have food, clothing, access to job opportunities, and other resources that allow them to lead independent lives. People should have a vision of what their future looks like. They should have hope. After five years, I seem to have found a rhythm of searching out nonprofits that I feel are making a significant impact, have strategic plans, and have strong leadership. I have come to view the nonprofits I work with as partners and my grants as investments in solutions. Because community needs are fluid, I want to remain open to new opportunities.

A Path Ahead Community Fund is a key part of my life and has been included in my estate plan so that I can ensure the fund's assets will continue to be invested to help the MetroWest community consistent with my core mission.

### Any other stories of hope and inspiration you would like to add?

It is so clear that the Foundation for MetroWest is here for the long term. For example, the Foundation for MetroWest provides training opportunities for high school students in MetroWest through their Youth in Philanthropy program. These students are learning so many skills. This opportunity is truly planting seeds for the future of our community by helping the next generation of philanthropists become equipped to serve their communities.

The Foundation for MetroWest is grateful for Sue DeRoche's continued partnership. To learn more about the Foundation's Donor Advised Fund options, visit our website at [foundationmw.org/give/starting-a-fund](https://foundationmw.org/give/starting-a-fund)

“I researched various sponsors of DAFs but found the Foundation for MetroWest was truly unique and would offer me so much more than asset management and back-office support.”

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### 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  
Community Fund for Wellesley  
Community Fund for Wellesley Covid 19 Relief Fund  
Community Fund for Wellesley - Al Robinson Fund for the Arts  
Medfield Foundation Legacy Fund  
Southborough Community Fund  
The Sherborn Endowment Fund

### 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  
Weston Arts & Innovation Center Fund

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### 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  
Circle of Hope Fund  
Community Therapeutic Day School Endowment Fund  
Discovery Museums Fund  
Framingham Adult ESL Fund  
Garden in the Woods Fund  
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Land's Sake Fund  
Learning Center for Deaf Children Fund  
Maynard Community Chest Endowment Fund  
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### Scholarship Funds

*Support MetroWest students continuing their education*

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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.*



## Waltham Fields Community Farm



At Waltham Fields Community Farm, one of our most popular food access projects, running for over a decade, is a seasonal market called MOM - our Mobile Outreach Market. At MOM, local low-income residents may purchase a share of our farm's vegetables valued over \$30 for just \$5 (payable with their SNAP benefits or with cash), or for free in exchange for one of our own vouchers acquired through over a dozen local social service partner organizations.

When COVID-19 hit, the need in Waltham was very visible - local food pantries had lines of people wrapped around the block. This helped inform our decision to switch our MOM program to payment-free for the 2020 season. "Pivoting our programs" was the operational phrase during that time for literally every planned activity. We pivoted MOM - usually a farm stand-style market set up weekly in downtown Waltham - to pre-packing boxes at our farm with vegetables designed to feed a family of 4 for a week. A hundred boxes were dropped off weekly on a rotating schedule to our community partners in Waltham, who used their networks to notify those in need. We were able to distribute 100% of these pre-packed produce boxes with support from Healthy Waltham, Charles River Community Health, Waltham Boys & Girls Club and the Waltham Housing Authority.

Funding from Foundation for MetroWest helped alleviate the cost of unbudgeted sanitation expenses, waxed produce boxes, and additional staffing to replace volunteer agricultural labor. This funding also helped to cover the loss of MOM revenue -- in effect, we were able to pass along the savings to those most in need during a very uncertain and frightening time.

-Stacey Daley, Executive Director, Waltham Fields Community Farm

# 2020 Financial Statements

## STATEMENT OF FINANCIAL POSITION

	2020	2019
<b>ASSETS</b>		
Cash and cash equivalents	\$ 1,476,975	\$ 1,046,710
Investments	24,291,448	22,661,506
Unconditional promises to give	1,783,999	2,261,672
Prepaid expenses and other assets	16,756	11,724
Property and equipment – net	13,195	17,352
Operating Lease Asset	82,642	138,058
<b>TOTAL ASSETS</b>	<u>\$ 27,665,015</u>	<u>\$ 26,137,022</u>
<b>LIABILITIES</b>		
Accounts payable and accrued expenses	\$ 11,562	\$ 6,859
Grants payable	40,000	20,300
Operating lease liability	82,642	138,058
Agency endowment funds	915,722	858,517
<b>TOTAL LIABILITIES</b>	<u>\$ 1,054,755</u>	<u>\$ 1,032,700</u>
<b>NET ASSETS</b>		
Unrestricted	\$ 21,449,426	\$ 19,583,732
Temporarily restricted	3,534,199	3,893,955
Permanently restricted	1,626,635	1,626,635
<b>TOTAL NET ASSETS</b>	<u>26,610,260</u>	<u>25,104,322</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 27,665,015</u>	<u>\$ 26,137,022</u>

## STATEMENT OF ACTIVITIES

	2020	2019
<b>SUPPORT AND REVENUE</b>		
Contributions, grants and gifts	\$ 5,571,615	\$ 2,391,682
Investment income	1,782,431	3,456,974
Program fees	9,409	8,210
Special events	\$ 285,055	\$ 547,862
In-kind contributions		–
– Net assets released from restriction		–
<b>TOTAL SUPPORT AND REVENUE</b>	<u>\$ 7,648,510</u>	<u>\$ 6,404,728</u>
<b>EXPENSES</b>		
Grantmaking and other program expenses	\$ 5,219,287	\$ 1,973,520
Management and general	472,749	531,658
Fundraising and development	450,536	571,498
<b>TOTAL EXPENSES</b>	<u>6,142,572</u>	<u>3,076,676</u>
<b>CHANGE IN NET ASSETS</b>	1,505,938	3,328,052
<b>NET ASSETS AT BEGINNING OF YEAR</b>	25,104,322	21,776,270
<b>NET ASSETS AT END OF YEAR</b>	<u>\$ 26,610,260</u>	<u>\$ 25,104,322</u>



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- Garry R. Holmes

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