

# 2019 annual report



FOUNDATION FOR METROWEST

**stronger together**

# Dear Friends,

**At the beginning of 2020**, when we originally sat down to write our 2019 Annual Report, we were proud to announce the total amount of giving and the impact we made during the 2019 year. We were also anticipating a year-long celebration of the Foundation's 25th Anniversary.

**Never would we have imagined** the challenges 2020 had in store for our region and the entire world. As we continue to navigate the global pandemic and return to what is a 'new normal,' we hope your family, friends and other loved ones are remaining safe and healthy.

**Though this year took a drastic turn**, and the Foundation has done some incredible work supporting our most vulnerable neighbors, our accomplishments of 2019 are not lost on us. Contributions from MetroWest businesses and residents like yourself made it possible for us to grant nearly \$1.9 million to local nonprofits, supporting a wide array of issues including visual and performing arts, career training, immigrant services, historic preservation, mental health counseling, literacy, environmental initiatives, resources for the elderly and victims of domestic abuse—a testament to the various needs that persist in MetroWest.

**The close of 2019** and the first half of 2020 have proven that we are stronger together. As your community foundation, we are able to mobilize resources and support our neighbors in need, whether through our traditional grant programming, or extreme, unprecedented times. More than a funder, our role is to act as a connector, educator and ally for our partners and neighbors.

**As we look forward** to the next 25 years and the role that we will continue to play in MetroWest, this annual report celebrates what we accomplished in 2019 and throughout the Foundation's history. It will also help us lay a solid foundation for the future.

Sincerely,



Judith G. Salerno  
Executive Director



Louis P. Crosier  
Board of Trustees, Chair

## COVID-19 UPDATE

To date, we have granted over \$3.9M to local organizations and neighbors in need.

# 2019 Giving Impact

At the end of 2019, the Foundation for MetroWest announced its largest giving year yet, awarding nearly \$1.9M to local nonprofits making change in our community. Here is a breakdown of where these funds were awarded.

## Agency/ Designated Funds \$236,109

Impact includes scholarship funds and funds that are restricted to a specific giving area designated by the founder of the fund - **environment, mental health, and other initiatives.**

Impact includes **supporting our fund holders in grantmaking** in the areas of education, mental health, enrichment, animal welfare, and many other initiatives. Donor advised funds can give to any organization, working with any initiative, as long as the organization is a non-profit.

## Donor Advised Funds \$767,918

## Youth in Philanthropy Grantmaking \$154,500

Each year, Youth In Philanthropy students fundraise for and grant money to youth-focused organizations in MetroWest. **In 2019, YIP cohorts gave \$154,500 to local organizations.**

Did you know food insecurity is a huge issue in MetroWest? In 2019, the Foundation gave **\$209,300 to aid hunger relief** in our communities. Grants were given for basic food support, access to food, food waste, stocking local food pantries, etc.

## Hunger Relief \$209,300

## Town Funds \$142,861

Funds that towns create specific to **supporting the unique needs in their communities** such as helping the aging population, ESL education, arts, and other issues that are prevalent in the town.

Each year, the Foundation runs competitive grant programs, where local organizations can apply for **funding in the areas of arts and culture, family support, and the environment.** In 2019, the Foundation granted \$383,000 to local non-profits working in these areas.

## Regional Grant Program \$383,000



# 2019 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  
Business Leadership 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)

Woolsey and Bea Conover  
Tom and Shari Crotty  
Mathworks  
Rands Family Fund

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

Crosier Family Fund  
Gannon Family Fund  
Susan and Brian Kavooigan  
Jack and Carol O'Neil

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

Atkinson Fund  
Roland Hoch and Sarah Garland-Hoch  
Hopkinton Country Club Charitable Foundation  
Amy and Matt Siegel  
Tower Fund

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

ArcLight Capital Partners  
Ballentine Partners, LLC.  
Robert Brack  
Brendon Properties, Inc.  
Maria and Adam Chase  
Cranshaw Construction  
Beth and Todd Cook  
Digital Federal Credit Union  
Emerson Hospital  
The English Family Fund  
Loren and Jeff Feingold  
Anne Grape  
Garry and Elaine Holmes  
Linda Hammett Ory and Andrew Ory Charitable Trust  
Pamela and Steve Lesser  
Michael and Peggy McAuliffe  
Margaret Ramsey and John McCluskey  
Sheila Gunn McCormack  
Middlesex Savings Bank  
Christine and Michael Miller

National Development Associates of New England, LP  
Oasis Systems  
Pattillo Magpie Fund  
Patricia and James Poitras  
R.W. Holmes Realty Company, Inc.  
Steve Sheinkopf  
SVN | Parsons Commercial Group, Inc.  
The TJX Foundation, Inc.  
Jessica and Peter Walter  
Waters Corporation  
The Yale Charitable Foundation  
The Z Fund

## FOUNDER

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

Kenneth and Susan Abrams  
Alyce and Caleb Aldrich  
Alexandria Real Estate  
Allegheny Contract Flooring, Inc.  
Christine Gilman and Thomas Andrews  
James Hanrahan and Scout Austin  
Avidia Bank  
Bernardi Auto Group  
Bowditch & Dewey, LLP  
Canby Financial Advisors  
CE Painting, Inc.  
Jeffrey Choney and Pam Dippel Choney  
Citizens Commercial Bank  
Consigli Construction Co., Inc.  
John and Jennifer DeSisto  
Donna Hale Donovan and John Donovan  
Corrie and Tom Dretler  
Eastern Bank Charitable Foundation  
Susan and David Elliott  
Federal Home Loan Bank of Boston  
Andrew and Elizabeth Gallinaro  
Christopher and Amy Gullotti  
Andrea and Russ Gullotti Charitable Fund  
Andrea Sussman and Andrew Troop  
John and Georgette Heerwagen  
Wendy and LT Hill  
Ipswich Bay Glass Co., Inc.  
Mary Beth and Andrew Mahoney  
Metropolitan Cabinets and Countertops  
The MFA Companies  
New England Development  
Needham Bank  
Maureen and Thad Palmer  
Pron Wealth Management  
Marianne and Ron Renaud  
Rockland Trust Charitable Foundation  
S & F Concrete Contractors, Inc.  
Christine and Doug Schuster  
Staples, Inc.  
Stonegate Group  
Vanasse Hangen Brustlin, Inc  
Wellesley Bank Charitable Foundation

## FRIEND

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

Tracey and Steven Angeli  
Aldon Electric, Inc.

Shirley Hui and Robert Allen  
Allways Health Partners  
Anchor Capital Advisors  
Bryan Anderson  
Tracey and Steven Angeli  
Leslie and Howard Appleby  
Atlantic Management Corporation  
Babson College  
Katherine Babson  
Bank of America Charitable Foundation  
Bank of America Private Bank  
Berkshire Bank  
BJ's Wholesale Club  
Holly Bonomo  
Don and Katie Bramley  
Brennan and Cianciolo Family Fund  
Brigham-Gill Chrysler Jeep Dodge & Ram  
Brookline Bank  
Brown Advisory  
Jacob and Barbara Brown  
Calare Properties  
Cambridge Trust Company  
Carruth Capital LLC  
Catalyst Health Ventures  
CBRE  
Circle Floors, Inc.  
Coan Heating & Air Conditioning  
Colantonio, Inc.  
Contexted  
Miriam Leeser and Robert Cooper  
Helen and Miner Crary Fund  
Cross Services Group  
Crosspoint Associates, Inc.  
Cumar Inc.  
Cummings Properties, LLC  
Cushman & Wakefield  
Dedham Institution for Savings  
Deland, Gibson Insurance Associates, Inc.  
Michele and Mark DeOliveira  
Depositors Insurance Fund  
Brenda and Peter Diana  
DiCicco, Gulman & Co., LLP  
The Driscoll Agency  
East Coast Interiors Corp.  
Eastern Bank  
Susanna and Timothy Estella  
Nancy and Dean Falb  
First Republic Bank  
Andrew Ross and Leslie George Fund  
Gilmore Rees & Carlson Pc  
Goldman Sachs  
Wendy and Brian Guthrie  
Coryn and David Hall  
Harold Brothers Mechanical Contractors  
Jen and Barnett Helzberg  
Harte Family Fund  
Harvard Pilgrim Health Care  
Ralph Hinckley, CFA  
Idylwilde Farm, Inc.  
J. Derenzo Company  
James Jay Lavoie Memorial Fund  
Janitronics Building Services  
Allen Kamer

Marla Kannel  
Dianna and Brian Kanter  
Kang Un Kim  
Ann Peterson and Stephen Lanzendorf  
Leahy Landscaping  
Tania and Scott Lechlitter  
Jennifer and Tom Levering  
David and Patty Levy  
Lighthouse Masonry, Inc.  
Laurel and Stephen Lyle  
Maureen Maas  
Susan Marandett  
Leslie and Kevin McCafferty  
McCall & Almy, Inc  
Middlesex Glass  
Fiona and Daniel Moore  
Lauren and David Murphy  
Marion Mussafer  
The N&D Group  
The Nelson Companies  
Newmark Knight Frank  
Northland Residential Corporation  
Libby and Tom Skiba  
Tiffany O'Connell  
Anthony George Ostler  
Partridge Snow & Hahn LLP  
Lynn Petrasch  
Nicholas and Mary Philopoulos  
Phoenix Mechanical Contracting  
Platinum Fire Protection & Services, LLC  
Michael Price  
PRW Wealth Management  
Paul Reeder  
Hannelore and Roger Reiser  
Jen and Peter Resnick  
Maurice and Luly Samuels  
Sara and Michael Schnitzer  
Rhoda and John Schwarz  
Jacqueline and Peter Segall  
Jeff Senarian  
S.M. Harrington Contracting, LLC  
Debbie and David Shuman  
Dale and Peter Sinesi  
Stanton Insurance Agency  
Ellen and Paul Stanton  
Holly and John Steiger  
David and Jennifer Swartz  
Swerling Milton Winnick  
Martha Tata  
The Thorson Foundation  
Tufts Health Plan  
Susan and Sam Tillinghast  
John and Kristine Van Amsterdam  
Village Bank  
Christopher Visvis  
Walker Development & Construction Management  
Sally and Richard Watts  
Laurie Krigman and Nate Weinsaft  
Joanne and Holyoke Whitney  
Audrey and John Williams  
Wilmington Trust  
Landis Becker Young  
Lilly and Edward Yun

## Nonprofit Partners

"The arts are uniquely qualified to build bridges through sharing cultural resources, while providing opportunity for collective gathering. We are grateful for the support we received from the Foundation to continue expanding the performing arts and education center during this moment of change and growth."

— Jean Mineo, President, Cultural Alliance of Medfield





“Of the 35 towns the CRWA serves, 21 of those are situated in MetroWest. Cities and towns often know to invest in police, firefighters and other key players in the community, but they don't know to invest in nature-based solutions that will protect people and property from weather extremes caused by climate change that are growing. Funding from the Foundation allows us to continue educating local municipalities on the importance of these solutions, and we are proud to have them as a partner.”

— Emily Norton, Executive Director, CRWA

## SUSTAINER (\$250-\$999)

Albert Risk Management Associates  
Michelle and David Andelman  
Colin and Melody Anderson  
Mary Antes  
Richard Francis Barron  
Molly and John Beard  
Thomas Berard  
Michael Blank  
Kerry Anne Bolinder  
Amy and Norris Boyd  
Elizabeth Brach  
Jill Bradford  
Liz Burnett  
Thomas Burns  
Jodi and Kenton Chase  
Business Interiors Floor Covering  
Virginia Ferko and Mark Cohen  
Heather and Brendan Coughlin  
Susan and Peter Covo  
The Cross Country Group  
Elizabeth and Christopher Cua  
CycleBar  
Carla Del Pizzo  
Doherty, Dugan, Cannon, Raymond & Weil, P.C.  
Drexel University  
Electrical Dynamics  
Ernest Guigli & Sons, Inc.  
Kathryn and Brett Fagin  
Fay School  
Stephen Feinberg  
Daniel Finn  
Andrea Finnerty  
Cathy and Richard Freedberg  
Ilyssa and Michael Frey  
Andrew and Kelly Friendly  
Mary Anne Furnald  
Sukanya Ghosh  
Gray, Gray & Gray, LLP  
Gustavo Preston Company  
Carolyn and Nicholas Guttilla  
Lisa and Alfred Hanmer  
Thomas Hayes  
Healy Charitable Foundation  
Julie and John Hebble  
Hemenway & Barnes LLP  
Shar and William Heslam  
Diane and Mike Heslop  
Joan Holmes  
Shirley and Charles Hurwitz  
Patricia and John Isley  
Bruce and Holly Johnstone  
Keller Williams Realty  
Kenneth Knox  
Betsy and Andrew Komjathy  
Koritz Wealth Strategies  
Rachel and Robert Kramer  
Marlous Lagarde  
Leisman Insurance Agency, Inc.  
Robert Leonard, CPA  
Betty and James Lo  
Barbara Manzolillo  
Dana Markmann  
Marilyn and Richard Martino  
Elspeth McCann  
Chrissy and Paul McCormack  
Kathy McMahon  
Joan and Kenneth Minkley  
John and Ann Newton

Lisa Novakoff  
Mark O'Connell  
Robert O'Neil, Jr.  
Deborah Oppenheimer  
Christina Pavlina  
Peck Associates  
Margot Phillips  
Elizabeth and Greg Robbins  
Clare and Mark Robinson  
Daniel Romano  
Carolyn and Rich Ross  
Salvatore Capital Partners  
Craig Schmidt  
Drew and Kiki Shilling  
Patty Sins  
Smarter Give  
John and Kate Skelly  
Mark Tarini  
Nathalie and John Thompson  
Cathy and Sandy Tierney  
Jennifer and Evan Tobasky  
Christopher Tracy  
Wellesley Investment Partners  
Watertown Iron Works  
Christopher Wickles  
Shalini and Prem Yerabothu  
David Yoshida

## CONTRIBUTOR

Affordable Interior Systems, Inc.  
David Alexander  
Sharon and Yanni Alphas  
Femina and Ejaz Ali, DMD  
Laurie Allen  
Altman & Company  
Katherine Barry  
Susan Bassett  
Harold Beacham  
Teresa and Michael Bean  
Michele Bernier  
Susan Berry and Brian Moynihan  
Ketan Bhukhanwala  
Dean Blackey  
Liz and Neil Blicher  
Kenneth Brier  
Boston Showcase Company  
Boston Youth Symphony Orchestras  
Brandeis University, The Sillerman Center  
for the Advancement of Philanthropy  
Jen and Roger Breslin  
Spencer Brown  
Elizabeth Buckner  
Richard Burke  
Jeanine Roche Calabria  
Vanessa Calderón-Rosado  
Tricia and Glenn Caldicott  
The Cambridge School of Weston  
Lisa Casey  
Century Bank  
Paul and Jen Barsamian  
Thomas and Christine Chisholm  
Erika Clarke  
Martin and Janise Cohen  
Sally Stoddard Collier  
Cary and Lewis Collins  
Deborah Colony  
Caryn Conway  
Mary Conway  
Kara and Larry Corley  
Catherine and John Crawford  
Kristen Curtin  
James Cumming  
Nathalie Dailida  
Sheila and Richard Davison  
Brian Day  
Rob DeFreitas  
Dara Delaney  
Matt DePalo  
Gloria DePatie  
Svetlana Derevyankina  
Jennifer Leisman Dessert  
Lisa Deutsch  
Cynthia and Bryon Deysher  
Barb and Russ Devlin  
Catherine Dietz  
The Discovery Museums  
Michelle and Paul Dobrin  
Vivian and William Dole  
Jennifer and Aaron Dolgoff  
Lynn and John Donahue  
Lucy Douglass  
Susan Drumm  
Debra Dufault  
Eaton Vance Investment Counsel  
Linda and Steven Eckles  
Tara and Michael Edelman  
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Mansfield Elkind  
Elkus Manfredi Architects  
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David and Lynn Falwell  
Susan Farris  
Juliette and Thomas Fay  
Joie Feinberg  
Michael Feinberg  
Gabriella and Rob Feldman  
Fiduciary Trust Company  
Lisa and Steven Finkel  
Jill and Eric Fishel  
Mark Fiskio  
Pam Fisher  
Wendy Fischman  
Cynthia and Maurice Fitzmaurice  
Daniel Forte  
Andrea and Steven Frank  
Kappy Freund  
Neil Friebrand  
Marie Friendly  
Lisa Fruhan  
Susan Garofalo  
Kris and John Gaziano  
Carol and Stephen Geremia  
Patrick Gill  
Helen and Neil Goins  
Nancy and Peter Goodall  
Christine and John Gordon  
William Gordon  
Bryan Gothie  
Chrissy and Mike Gray  
Samantha Colbert Greenfield  
Zhimang Gu and Jing Cheng  
John Haak  
Jill Guzzi and Eric Harnden  
Naz Hassanein  
Matthew Hennessey  
Sheila Hennessey  
Marianne Herlihy  
Kristine and Robert Hickey  
Karol and Eric Hjerpe

Christine Holland  
Elizabeth Holmes  
Richard Hollworth  
Chris Horblit  
Selen Hotamisliligil  
Bruce Hulme  
Diana and Lee Humphrey  
Indian Hill Music, Inc.  
Will Hynes  
Beth and Paul Jakubowski  
Sandra Joseph  
Shaila and Raju Kalpande  
Melinda and Jonathan Karelitz  
Julie and Mark Kaufman  
Bill Kennedy  
Christine Kendall  
Madeline and Troy Kenyon  
Colleen Kettle  
KIPP Massachusetts  
Kelly Kober  
Mary and Jim Krumsiek  
Eva Kuruvilla

## Foundation Support

“Our trustees helped establish FFMW in 1995 because they recognized that the region would benefit from the unique role a community foundation plays in highlighting the inequities present in MetroWest and raising funds to address and alleviate them. FFMW has been instrumental in keeping those dollars local. From our point of view, the more philanthropic dollars targeted to our region, the better we can all fulfill our common goal of community betterment. We believe our work as a place-based, private foundation is complemented by the work of the community foundation, which is why we give to the Foundation for MetroWest.”

—Marilyn Martino, Executive Director  
Sudbury Foundation

Henry Lapham  
Anna and Mark Lambert  
Ken Lampert  
Ann and David Lautz  
Stephanie and David Lawrence  
Jacquelyn Lenth and Andrew Falender  
Theresa and Steven Levy  
Linda Luiso and Michael Lyons  
Diane Lunder  
Jennifer MacDonald  
Christie and Joe MacDougall  
Mary and Peter Mahoney  
Ram Mandala  
Ronald Mangone  
Cynthia Mayer  
Anne McBride  
Bobby McGuire  
Val and Bob McGuire



"We recognize the needs in MetroWest are much different than in other regions. We're fortunate to have an organization like the Foundation for MetroWest as a partner to help fight food insecurity in this region"

– Lauren Palumbo, Chief Operating Officer, Lovin' Spoonfuls

Ryan McKee  
Michelle Meal  
Eve and Matthew Megargel  
Kelly Mitchell and Matthew Bernstein  
Morgan Partners, LLC  
Justine and Rob Morris  
Kathy Mulroy  
Leanne Murphy  
Eliomar Nascimento  
Claire and Michael Nedham  
Colleen and Matthew Neutra  
Kathy Nomicos  
Pamela and Kevin O'Brien  
Barbara and Charles Olton  
Gary and Susan Palefsky  
Caren and Randy Parker  
Wendy and Jim Paul  
Elaine Payne  
Nicola Payne and Robb Aistrup  
Donna and Mark Pearlstein  
Claudia Perkins  
Chris Perry  
Gerald and Sheena Peterson  
Danielle Piskadlo  
Yekaterina Portnaya  
Johnathan Price  
Melissa Probst and J. Barr Kenny  
Project STEP  
Barbara and Frederick Pryor  
Mike and Kim Pucci  
Dian Quinn  
Sara and John Rex  
James Rider  
Melissa and Alan Ringuette  
Rockland Trust  
John Roessner, III  
Benna Lynch Rondini  
Dana Ropper  
Stephanie Rose  
Mark Rosenthal  
Susan and Matthew Ryan  
Judith and Tony Salerno  
Elizabeth Saltonstall  
Gabriella Sanna  
Robin and Steve Scari  
Lynn and Gregg Schade  
Kyle and Amy Schaffer  
Anne and Neil Schneider  
Patricia Schneider  
Laura Scott  
Carol Boudreau Seibel  
Susie Shortsleeve  
Joan and Marvin M. Siflinger  
Michael and Wendy Simches  
Nancy Simpson-Banker  
Erik Sirri  
Katlyn Shea  
Leslie and Craig Slater  
Karen and Phillip Song  
SourceOne IT, Inc.

Martha Southard  
Sue and Ken Stewart  
David Michael Stewart  
Doug Straus  
Joanne Sullivan  
Lisa Svensson  
Judith Swanson and Jim Adams  
Cindy Murtha Tanny  
Terry and Michael Taylor  
Larissa Thurston  
Margie and Jack Tierney  
Anne Marie Towle  
Susan Twarog  
Eleanor Uddo and Richard Feigenbaum  
Tara Urban  
Laura Vasaturo  
Peter Waisgerber  
Sara Walker  
Audrey Wallace  
Lisa Wallack  
Brian Walsh  
Faye and Mitch Weaver  
Garry Weiner  
Rosemary Wilson  
Ashley Wojcik  
Jane and Joseph Wojcik  
Wistar Wood  
Amarylis Workman  
Anne and Jon Yates  
Mary Young  
David Zaltas, Esq.  
Sally and Bruce Zetter  
Sarah Zhu and Weiguo Wang

## 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  
Community Fund for Wellesley  
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

### Donor Advised Funds

*Provide grants based on regular advice by the donors*

Alpert Cohen Charitable Fund  
A Path Ahead Community Fund  
Adam Gurley-Green Memorial Fund  
Andrew Ross and Leslie George Fund  
Anna E. Lesser Fund  
Anson- Charron-Bass Fund  
Brack Family Fund  
Brennan and Cianciolo Family Fund  
Business Leadership Fund  
Carls Fund  
Cohen-Gertz Family Fund  
Crosier Family Fund  
Crotty Family Fund  
Daniel B. Lesser Fund  
Deland, Gibson Fund  
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  
Karen Owczarek Memorial Fund  
Kenney Family Fund  
Kern Family Fund  
Lagnappe Fund  
Lawrence Family Fund  
Lillian Award Fund  
Michael Gannon Fund  
Pattillo Magpie Fund  
Pike Family Fund  
Poitras Memorial Fund  
Rands Family Fund  
R & S Hoch Family Fund  
Rylee Fund  
S.G.McCormack Legacy Fund  
Sean Gannon Fund  
Sherborn Fund  
Sophia R. Lesser Fund  
The James Jay Lavoie Memorial Fund  
The Tower Fund  
The Z Fund  
Thompson Family Fund  
Trustees and Advisors 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

"Beyond the important mission of grant-making, community foundations play a critical role in, coalescing, uniting, educating and gathering together the organizations that attend to the needs of the community at large. The Foundation for MetroWest is a professional, extraordinarily well-managed, highly respected, forward thinking organization that adds immeasurably to the knowledge of where the needs are in this region. Supporting the Foundation is a way to share one's blessings with the people and institutions that have made my community the wonderful and vibrant place that it is."

-Woolsey Conover

### 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  
Mary June Nylander Souza Scholarship Fund  
Newton South High School Alumni Gift Fund  
Rachel Manoli Scholarship Fund  
Scholarship Funds  
Rick Clark Leadership 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

## Corporate Partners

"No organization knows better than the Foundation for MetroWest how to care for our community. This was clearly evidenced during the outbreak of Covid-19, when corporate organizations, professional donors, and other members of the community made substantial unsolicited donations to the Foundation, with confidence this organization would know how to best put the resources to work quickly and create the most impact. As a firm that is located in the heart of the MetroWest region and benefits from its many resources, we relish the opportunity to support the Foundation's commitment to improving the quality of life for all who live and work in one of the largest and most diverse communities in New England."

- Canby Financial Advisors

*\*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.*

# 2019 Financial Statements

## STATEMENT OF FINANCIAL POSITION

	2018	2019
<b>ASSETS</b>		
Cash and cash equivalents	\$ 1,082,667	\$ 1,046,710
Investments	18,789,901	22,661,506
Unconditional promises to give	2,612,115	2,261,672
Prepaid expenses and other assets	13,804	11,724
Property and equipment – net	10,182	17,352
Operating Lease Asset	191,173	138,058
<b>TOTAL ASSETS</b>	<u>\$ 22,699,842</u>	<u>\$ 26,137,022</u>
<b>LIABILITIES</b>		
Accounts payable and accrued expenses	\$ 26,257	\$ 6,859
Grants payable	20,000	20,300
Operating lease liability	191,173	138,058
Agency endowment funds	686,142	858,517
<b>TOTAL LIABILITIES</b>	<u>\$ 923,572</u>	<u>\$ 1,032,700</u>
<b>NET ASSETS</b>		
Unrestricted	\$ 16,181,794	\$ 19,583,732
Temporarily restricted	3,967,841	3,893,955
Permanently restricted	1,626,635	1,626,635
<b>TOTAL NET ASSETS</b>	<u>21,776,270</u>	<u>25,104,322</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 22,699,842</u>	<u>\$ 26,137,022</u>

## STATEMENT OF ACTIVITIES

	2018	2019
<b>SUPPORT AND REVENUE</b>		
Contributions, grants and gifts	\$ 3,326,914	\$ 2,391,682
Investment income	(1,207,455)	3,456,974
Program fees	(12,155)	8,210
Special events	\$ 503,580	\$ 547,862
In-kind contributions	–	–
Net assets released from restriction	–	–
<b>TOTAL SUPPORT AND REVENUE</b>	<u>\$ 2,610,884</u>	<u>\$ 6,404,728</u>
<b>EXPENSES</b>		
Grantmaking and other program expenses	\$ 1,880,063	\$ 1,973,520
Management and general	420,392	531,658
Fundraising and development	557,963	571,498
<b>TOTAL EXPENSES</b>	<u>2,858,418</u>	<u>3,076,676</u>
<b>CHANGE IN NET ASSETS</b>	(247,534)	3,328,052
<b>NET ASSETS AT BEGINNING OF YEAR</b>	22,023,804	21,776,270
<b>NET ASSETS AT END OF YEAR</b>	<u>\$ 21,776,270</u>	<u>\$ 25,104,322</u>



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