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**On the cover:**

The *Greater Worcester Community* *Health Improvement Plan* (CHIP) has drawn many partners with its goal to turn Worcester into the healthiest city in New England by 2020. At Worcester State University, the CHIPs in Action program engages students and faculty in projects that advance public health. Participants include Assistant Professor Roger S. Greenwell and Nidhee Krishnan ’16, who is monitoring the presence of immunity-boosting microbes in the soil of parks where children play.
LETTER TO OUR COMMUNITY

Greater Worcester Community Foundation was formed in 1975, when the city was at a crossroads and a significant assembly of engaged leaders became convinced that a new vehicle for progress was needed. Since then, thousands of donors have created funds or have made gifts that enlarge the Foundation’s grantmaking vehicle.

As volunteers, donors also participate in the governance and grantmaking of the Foundation. Together, we have developed a citizen-driven philanthropic organization that since 1975 has distributed more than $100 million in grants and built an endowment that exceeds $135 million.

It is our conviction that having more, we can do more. Applying our shared community wisdom, we have created a new strategic plan, guidelines and process that enable us to make larger and more targeted community grants from the Foundation’s discretionary funds.

Community grants of up to $25,000 will be awarded once rather than twice a year to deepen our selection and evaluation of grantee programs. These investments will support multiple, interrelated goals to foster a citizenry with the basics to participate more fully in their community—economic security, proper housing, quality health care, and a sound education, particularly for the youngest among us. We will devote significant resources to advancing these goals.

Thank you for joining us in building the Foundation into an organization that empowers citizens to take action as leaders through our shared philanthropy.

Ann T. Lisi
President and CEO
Lee Gaudette
Chairman

AT A GLANCE
(as of 12/31/2015)

Total gifts received $6 Million
Including bequest gifts of $2.4 Million
991 gifts
876 donors
17 new funds
561 funds in total
Investment returns -1.1
Total Assets $135.6 Million
Grants and scholarships approved $5.7 Million
636 grantee organizations
376 scholarship recipients
Received a total of $616,650

MARKET VALUE BY FUND TYPE
(in millions)

- $12.90 Donor Advised
- $18.70 Designated
- $19.10 Discretionary and Field of Interest
- $18.60 Agency
- $61.80 Scholarship

Foundation Chair Lee Gaudette and President Ann T. Lisi at Rainbow Childhood Development Center.
2015 HIGHLIGHTS

GRANTMAKING

In 2015, as the Foundation marked its 40th year, the total of its grant making since 1975 surpassed $100 million.

A new strategic plan, guidelines and process, enable the Foundation to make larger and more targeted community grants from discretionary funds.

The Foundation invested over $550,000 to reduce health disparities through grants from several funds, including the Fairlawn Foundation Fund, Fallon/OrNda Community Health Fund, and discretionary funds. Funded programs increase access to health care, improve services to seniors, provide counseling to children, and increase scholarship funds for nursing students at local universities.

The Foundation has embraced the Greater Worcester Community Health Improvement Plan (CHIP), and directs its health grants to meeting the plan’s goal of turning Worcester into New England’s healthiest city by 2020.

Education grants focused on programs beyond the classroom that engage parents and give our youngest children and at-risk youth the skills to succeed in school and life.

Making a $44,000 grant to reduce summer learning loss, the Foundation joined with the United Way of Central Massachusetts to nearly double the reach of the Worcester Summer Learning Collaborative, which reports that 75% of 1,000 children maintained or improved reading levels.

CIVIC ENGAGEMENT

The Foundation supported the City of Worcester’s Community Dialogues on Race, a series of public meetings led by city officials with support from the U.S. Department of Justice on such topics as: representative government, public safety, youth and education, social media, and economic development to increase community-wide engagement in these critical issues.

At the Foundation’s 40th annual meeting on May 20, 2015, Frances M. Anthes, president and CEO of Family Health Center of Worcester, received the 11th annual Renaissance Award. Founding donor Jack Lund (1920-2010) created the award to honor exemplary nonprofit leaders.
The Foundation and the Worcester Regional Chamber of Commerce inaugurated our joint program, **Leadership Worcester**, with 25 young professionals taking part in its first cohort of future civic leaders.

**YOUTH FOR COMMUNITY IMPROVEMENT (YCI)**

Now in its 16th year, the YCI program has **engaged nearly 200 teenagers** from diverse ethnic and economic backgrounds and **awarded over $285,000** to more than **70 nonprofit organizations** in Worcester County; and in 2015, awarded over $23,000 for programs that included a summer produce program, a young woman’s leadership program, and employment training for youth.

**NONPROFIT SUPPORT CENTER**

In 2015, the Foundation’s **Nonprofit Support Center** — the region’s only peer learning resource for nonprofit managers — offered twelve highly regarded workshops on topics that varied from developing board members to raising operating reserves, with emphasis on storytelling and other team-building skills. More than 90 local nonprofit leaders attended the summer social at the Hibernian Cultural Centre.

The Foundation’s annual Scholarship Reception, held June 24, 2015 at Clark University’s Campus Center, drew 200 scholarship recipients, donors and Scholarship Committee volunteers.

The Foundation’s Fall Insights Tour for donors, entitled “Ready for Tomorrow,” included remarks by the principal of Union Hill School, a K-6 school that has achieved a remarkable turnaround, as well as visits to African Community Education Program, Girls, Inc., and the American Antiquarian Society, the nation’s chief repository of early American documents.
Youth learners thrive when they see that
their parents are learners too. 2015 grantees
include programs that involve parents in
their child’s education. As role models and mentors,
they assist their children in overcoming barriers
to success.

Better fathers, better men
Men help each other become better fathers through
support groups at Pernet Family Health Service.

Christopher Nelson, coordinator of Pernet’s
Fathers and Family Program, conducts a parenting
class at the Worcester County House of Corrections.
The men meet hourly for 10 weeks and keep a
journal. At the end of each class, Chris gives them
a question. For example, he asks each man to think
about how his child feels to be away from his dad. In
the next class, they share their thoughts. “Some break
down in tears,” says Chris. “They see the impact of
their choices on their kids.”

Another support group for fathers
convenes at Pernet. Most participants
attend under court order. Its leader
graduated from the 12-week program.
“After he gained custody of his daughter,
he wanted to give back,” says Chris,
who co-led the sessions with him for
two years. “He’s lived through the same
experiences as the men in his group. In jail or at
Pernet, these men realize that even apart from their
kids, they are still fathers. This insight helps them
to make better choices.”

Moving up in learning and life
A Foundation mini-grant helped bring a college-
level humanities course to low-income Worcester
adults. Pioneered in 1995 at the Roberto Clemente
Family Guidance Center in New York City and now
offered nationwide, the Clemente Course in the
Humanities offers free tuition, textbooks, childcare
and transportation.

While improving writing and speaking skills,
participants study literature, philosophy, history and
the arts. Graduates earn six college credits and often
pursue advanced degrees.

Hosted by Worcester Interfaith and taught by
faculty from local colleges, classes meet from October
to May at the Worcester Art Museum, which offers
participants free passes
for one year.

Next door at Trinity
Lutheran Church,
students from the John J.
Binienda Center for Civic
Engagement at Worcester
State University conduct
learning activities for children in synch with their
parents’ classes.

“This course empowers people to take a larger
part in civic life,” Says Elizabeth Bacon, community
coordinator. “And they become lifelong learners,
inspiring their children.”

At-risk boys build staying power
Outraged by the daily sight of discarded hypodermic
needles near their school, a group of Worcester East
Middle School boys decided to fight back. Participants
in Encouraging Latinos to Achieve Excellence
(ENLACE), a program of Latino Education
Institute, the boys created a campaign against
opioid abuse and raised money for Hector Reyes
House, which treats Latino men for drug addiction.

The students were completing the service
segment of the 30-week program, which helps
at-risk boys develop the character and skills to
succeed in school and life.

“Our young men set goals and review their
progress with parents, mentors and teachers,”
says Elliot Rivera, ENLACE program coordinator.
“Behavior issues and suspension rates go down.
They start looking ahead.”

The Pernet Fathers & Family Program provides weekly
support groups to provide fathers with the opportunity
to share personal experiences and support their efforts
to strengthen their connection with their children.
Our region’s cultural institutions are true civic assets. At their best, they are crossroads of our community, bringing people of all backgrounds together to experience our ever-evolving heritage—including the arts, our history, and our natural resources. They offer us close encounters with our world and, at times, with each other and ourselves. These are participatory experiences, and for some, life-changing events.

We invest in making such experiences available to all, not just by becoming more affordable; but also by engaging diverse audiences in meaningful ways.

**Students make music at school and on stage**

Since 1858, **Music Worcester** has been bringing a world of live music to Mechanics Hall. Music Worcester also brings music into Worcester’s public schools and prepares students to perform on its grand stage with renowned musicians and singers.

After months of coaching, high school students sing alongside the **Worcester Chorus** in its annual performance of Handel’s “Messiah.” Musicians from middle school upward are mentored by famous visiting artists and perform a classical piece at Mechanics Hall. Music Worcester introduces elementary schools to orchestral performance with Music-to-Go, a venture with the Joy of Music Program that links music with math and science.

“Our Foundation grant is a badge of achievement,” says Adrien Finlay, executive director, Music Worcester. “It also pushes us to do more.”

**Theater and school adopt one other**

Foundation donors eagerly support Adopt-a-School, a partnership between **Hanover Theatre for the Performing Arts** and nearby **South High Community School**.

Now in its third year, the program engages the entire school in a Broadway touring production. Weeks of classroom projects integrate the show’s themes and staging into the core curriculum. Students meet with the cast and display their projects in the theater throughout the show’s run. Music students perform in the production’s spectacular song-and-dance finale before their 1,300-strong South High audience.

“Touring groups are energized by the kids, and students experience the power of theater,” says Meghan Montaner, Hanover’s education director. “South High is our neighbor. Together, we are making theater part of their lives.”

**Transformative encounters with art**

Annual grants from the Foundation’s Booth Family Fund for Education and Outreach help the **Worcester Art Museum** offer visitors closer encounters with the arts.

“Our galleries are now full of interactive experiences,” says Marcia Lagerwey, the museum’s curator of education. “People are welcomed and engaged.”

Galleries offer both digital and hands-on options—from trying on armor and jousting with wooden swords to joining a guided tour.

Teenagers referred by the Worcester County Juvenile Court take part in the Arts Alternative Program. Visiting monthly, they view art and then create their own works. Their projects stir new strengths, including creative problem solving and self-esteem. After their concluding exhibition, some stay on, as recipients of museum scholarships.
Seeding boundary-free discoveries

In 2015, 14,000 Worcester Public Schools students took part in Culture Learning through Education and Arts Partnerships (LEAP). Six years ago, a Foundation grant expanded the program, which links classroom learning with visits to cultural institutions.

“Schools and their hosts jointly plan, conduct and evaluate each visit,” says Louise Clarke, executive director, Worcester Educational Development Foundation, which administers the program.

For example, after preparing in science, math and reading classes, the city’s second graders visited Tower Hill Botanic Garden, where they identified flowers in a scavenger hunt and planted seeds.

The Foundation funds ventures that open museums to all. A 2015 grant helped the EcoTarium remain among local museums that deeply discount admission for residents with electronic benefit transfer (EBT) cards. With its family-friendly STEM-based educational experiences, the EcoTarium saw its EBT program surge to serve 3,000 visitors per year.

“An EcoTarium visit can ignite a child’s passion to become tomorrow’s astronaut, biologist or conservationist,” says Joseph P. Cox, EcoTarium president. “Enabling every child to make such life-changing discoveries is fundamental to our mission.”
The Foundation embraced the Greater Worcester Community Health Improvement Plan (CHIP) from the start, and directs its health care grants to CHIP goals.

The Foundation works on multiple, interrelated fronts and so does CHIP, which aims to turn Worcester into New England’s healthiest city by the year 2020. The plan targets five priorities: healthy eating and active living; mental health; access to primary care; violence and injury prevention; and health equity.

Recognizing such factors as poverty and substandard housing as health risks, the Foundation fosters partnerships and makes grants to reduce health disparities in our community. Our Fairlawn Foundation Fund commits its entire annual grants budget to the CHIP agenda. 2015 grantees include a pioneering university-public sector alliance and a new apprenticeship program for community health workers.

Preparing public health leaders

CHIPS in Action engages Worcester State University students and faculty in research, outreach and policy-making projects that further plan goals. Based at the WSU Center for Interdisciplinary Health Research and Practice, this unique alliance between a university and a local public health agency can be a model for other communities, says Linda Larrivee, dean of WSU’s School of Education, Health and Natural Sciences.

“All students at WSU get a chance to advance wellness in their city,” says Linda. “The Foundation was among the first to recognize CHIP as ground-breaking and to see how a university can help realize its ambitious vision.”

Meeting demand for well-trained community health workers

Providing essential services to people with varied needs—from the frail elderly to patients with chronic health conditions—community health workers (CHWs) perform a critical role in delivering quality and cost-effective care.

“Demand is growing for CHWs, who face new credentialing requirements,” says Joanne L. Calista, executive director of the Center for Health Impact, which received a Foundation grant to pilot a CHW apprenticeship program—among the first in the U.S. “Participants earn while they learn and gain extensive on-the-job training and classroom instruction. We also prepare employers to effectively integrate CHWs into health care teams.”

Serving the most vulnerable

A Foundation grant enabled South Middlesex Opportunity Council to meet high demand for shelter this winter. “Extra staffing at night enabled us to maintain a safe, orderly environment,” says Jayde Campbell, component director, Greater Worcester Housing Connection. “We did not have to pull case managers away from providing services that move people out of homelessness.”

Each year, the Foundation’s Fallon/OrNda Community Health Fund supports programs serving the most vulnerable. 2015 grantees include Family Health Center of Worcester, which serves hundreds of homeless families; and an initiative of Youth Opportunities Upheld, Inc., that provides therapy to at-risk preschoolers and trains parents and teachers to manage disruptive behavior so troubled children learn to thrive in school. Another grantee, the Southeast Asian Coalition of Central Massachusetts, helps immigrants communicate with their primary care providers and insurers and learn about preventive care.

The health of kids can improve by playing in dirt—that is, soil rich in microbes. Exposure to varied microbes boosts kids’ immunity and prevents health problems such as allergies and asthma. For a CHIPs in Action project at Worcester State University, Nidhee Krishnan ’16 is testing the safety and microbe content of soil from local parks.
Regional Environmental Council enterprises to advance food justice include a joint plan with the Worcester Regional Chamber of Commerce to create a regional food hub.
On the following pages is a listing of organizations that received cumulative totals of $2,500 or more from our discretionary, donor advised, agency or designated funds. It is through the generosity of the many donors who established these funds that these grants are made.

15-40 Connection $9,000

Abby’s House $36,121
African Community Education Program $49,300
All Saints Episcopal Church $22,166
American Antiquarian Society $27,992
American Red Cross of Central and Western Massachusetts $34,500
Anna Maria College $20,000
Appalachian Mountain Club $5,000
ART in the PARK, Worcester $3,000
ArtsWorcester $12,500
Ascension Care Alliance $23,000
Athol Area YMCA $3,000
Auburn Youth & Family Services $16,481

Bancroft School $56,320
Barton Center for Diabetes Education $5,500
Baystate Health Foundation $100,000
Becker College $17,800
Best Buddies Massachusetts $4,000
Big Brothers/Big Sisters of Central Mass/MetroWest $18,300
Blackstone Valley Boys & Girls Club $7,500
Boys & Girls Club of Webster-Dudley $7,000
Boys & Girls Club of Worcester $34,808
Bridge of Central Massachusetts $30,889

C
Camp Putnam $10,000
Cape Cod Healthcare Foundation $5,000
Casa Project $30,100
Catholic Charities Worcester County $31,000
Center for Nonviolent Solutions $8,000
Center for Women & Enterprise $8,000
Central Massachusetts Area Health Education Center $100,000
Central Massachusetts Housing Alliance $13,000
Centro, Inc. $12,000
Children’s Friend $32,492
City of Worcester Health and Human Services $5,000
Clark University $27,654
College of the Holy Cross $3,500
Common Ground Land Trust $3,000
Community Harvest Project $33,430
Community Healthlink $77,932
Community Legal Aid $42,978
Community Servings $9,000
Crawford Memorial Library $36,673

D
Dana-Farber Cancer Institute $3,000
Department of Children and Families $25,000
Diocese of Worcester $21,477
Discovery Museums $5,000
Dismas House of Central Massachusetts $23,500
Dynamy $13,300

East Douglas Evergreen Cemetery Company $13,330
EcoTarium $54,450
Edward M. Kennedy Community Health Center $29,772
Edward Street Child Services $81,000
Elder Services of Worcester Area $26,178
Elm Park Center for Early Childhood Education $7,500
Eye of the Storm Equine Rescue $8,000

Family Health Center of Worcester $89,224
Federal Employee and Education Assistance Fund $5,000
First Night Worcester $6,000
First Unitarian Church $27,111
Fisher House Foundation $2,500
Francis W. Parker Charter Essential School $22,000
Friendly House $26,593
Friends of Families in Transition $3,000

Genesis Club $30,500
Girl Scouts of Central and Western Massachusetts $8,394
Girls Inc. of Worcester $33,194
Greater Worcester 32° Masonic Learning Center for Children $2,672
Greater Worcester Land Trust $7,650
Growing Places Garden Project $7,000
Guild of St. Agnes $11,800

Habitat for Humanity-MetroWest/Greater Worcester $10,000
Harry Chapin Food Bank of Southwest Florida $3,000
Harvest Fair Committee $3,000
Hearts for Heat, Leicester Chapter $5,574
Hillside School $5,846
HOPE Coalition $38,000
Horace Mann Educational Associates $8,000
Horizons for Homeless Children $7,000
House of Peace and Education $10,000

Indian Lake Watershed Association $5,000
Interfaith Hospitality Network of Greater Worcester $13,500

Jeremiah’s Hospice $16,000
Jewish Family Service of Worcester $7,500
Joy of Music Program $24,746
Junior Achievement of Northern New England $12,000

Kennedy Donovan Center $11,717

Latino Education Institute $52,000
Latino History Project of Worcester $3,000
Leicester Council on Aging $4,000
Leicester Police Department $6,000
Leicester Primary School $3,000
Leicester Summer Concert Series Committee $4,500
Literacy Volunteers of Greater Worcester $34,250

MAB Community Services $13,888
Main South Community Development Corporation $12,500
Massachusetts Academy of Mathematics and Science $6,950
Massachusetts Audubon Society $39,663
Massachusetts Education and Career Opportunities $11,260
Massachusetts General Hospital  $4,000
Matthew 25  $10,374
MCPHS University  $10,500
Merrimack River Feline Rescue Society  $3,000
Milford Regional Healthcare Foundation  $6,000
Mohegan Council Boy Scouts of America  $8,785
Montachusett Interfaith Hospitality Network  $15,000
Montachusett Opportunity Council  $8,000
More Than Wheels  $5,000
Mount Grace Land Conservation Trust  $6,500
MSPCA-Angell  $3,700
Music Worcester  $43,295
Mystic Seaport  $3,000
N
Nativity School of Worcester  $9,000
NEADS/Dogs for Deaf and Disabled Americans  $35,299
NEADY Cats  $5,000
New Hope  $12,000
NewVue Communities  $20,000
Nichols College  $2,383
North Brookfield Youth Center  $10,000
North Quabbin Citizen Advocacy  $7,000
O
Oak Hill Community Development Corporation  $22,500
Old Sturbridge Village  $16,000
Opera New England of Northeastern CT  $3,500
Operation Outreach-LISA  $5,000
Our Father’s House  $16,000
P
Pakachoag Music School of Greater Worcester  $7,000
Park Spirit of Worcester  $4,840
Pathways for Change  $15,000
Performing Arts School of Worcester  $5,000
Pernet Family Health Service  $41,750
Phillips Exeter Academy  $7,500
Planned Parenthood League of Central Massachusetts  $9,800
Preservation Worcester  $13,437
Proprietors of Rural Cemetery  $12,627
Q
Quinsigamond Community College  $2,920
R
Rachel’s Table  $17,000
Rainbow Child Development Center  $24,050
Reach Out and Read  $13,000
Refugee and Immigrant Assistance Center  $10,000
Regatta Point Community Sailing  $7,000
Regional Environmental Council  $25,500
Reliant Medical Group Foundation  $4,200
Rise Above Foundation  $5,000
S
Salvation Army Lee County  $3,000
Salvation Army Worcester Citadel Corp  $9,579
Science from Scientists  $3,000
Second Chance Animal Shelter  $14,000
Shine Initiative  $5,000
Shrewsbury Public Library  $8,700
Silent Spring Institute  $3,700
South High Community School  $14,300
South Middlesex Opportunity Council  $15,000
Southeast Asian Coalition of Central Massachusetts  $55,000
Spanish American Center  $10,000
St. Anne and St. Patrick Parish  $6,000
St. Anne’s Church  $3,000
St. Joseph and St. Pius X Parishes  $7,500
St. Mary School  $3,000
St. Mary’s Assumption Albanian Orthodox Church  $34,073
St. Mary’s Junior Senior High School  $3,000
St. Peter’s Parish  $3,200
St. Saviour’s Parish  $2,500
Straight Ahead Ministries  $37,500
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<th>Organization</th>
<th>Amount</th>
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<td>Tenacity</td>
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<td>Tennessee Justice Center</td>
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<td>Thayer Memorial Library</td>
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<td>The 300 Committee Land Trust</td>
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<td>Touchstone Community School</td>
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<td>Town of Petersham</td>
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<td>Valley Residents for Improvement</td>
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<td>YMCA of Central Massachusetts</td>
<td>$36,336</td>
</tr>
<tr>
<td>YMCA of Greater Hartford</td>
<td>$66,000</td>
</tr>
<tr>
<td>Youth Connect</td>
<td>$15,000</td>
</tr>
<tr>
<td>YWCA of Central Massachusetts</td>
<td>$70,000</td>
</tr>
</tbody>
</table>
LIST OF FUNDS

Discretionary & Field of Interest Funds allow the Foundation to make grants in response to pressing community needs.

Ruth and John Adam Fund (2000)
George I. Alden Education Fund (2010)
Lois Anne Memorial Fund (1993)
Isabel K. Arms Fund (2015) NEW
Fund for the Arts and Humanities (1993)
Nils Bjork Memorial Fund (1992)
Robert W. Booth Fund in Memory of George F. Booth (1988)
Robert S. and Helen A. Bowditch Fund (1990)
Cancer Care and Research Fund (1991)
Central Massachusetts Health Standards Fund (1990)
Child Wellness Fund (2001)
Community Ministries Fund (2006)
Community Response Fund (2010)
Dr. Harold M. Constantian Fund (1997)
Lorraine Crepeau Fund (2006)
Robert and Mary C. Cushman Fund (1978)
Richard C. Daniels Fund (2001)
Anna S. and Warren G. Davis Fund (1998)
Jean B. and Gilbert S. Davis Fund (1994)
Rosemary Davis Environmental Preservation Fund (2001)
Sarah B. and Dix F. Davis Fund (2002)
Densmore Community Fund (2011)
Directors and Corporators Community Impact Fund (2007)
Eliza D. and Cora J. D. Dodge Fund (1985)
EMC Community Fund (2000)
Fairlawn Foundation Fund (1991)
Fallon/OrNda Community Health Fund (1996)
Marion Stoddard Fletcher Fund (1992)
Founders Fund (1983)
Samuel Frank Charitable Fund (1993)
Esther and Howard G. Freeman Fund (1984)
Garfield Berry Fund (1998)
Ragnhild L. Gersdorf Fund (1994)
GLBT Endowment Fund (2010)
Haskell and Ina Gordon Fund (1980)
Margaret A. and Ralph H. Gowetz Fund (1990)
Greater Worcester Jaycees Fund (1997)
Nathan and Barbara Greenberg Fund (1982)
Raymond P. Harold Discretionary Fund (1982)
Francis A. and Jacquelyn H. Harrington Human Services Fund (1992)
Rosemary Marble Harris Fund (2001)
Orville Harrold Fund (2006)
Harriet Miller Hight Education Fund with the Association of Colored Peoples (1982)
Jeppson Memorial Community Fund (1976)
Jiji’s Fund (1999)
Lund Pioneer Fund (2010)
Main South Fund (1999)
Frances F. Mansfield Discretionary Fund (1996)
Barbara S. Massey Fund (2000)
Micah Housing Corporation Fund (1981)
Marc Needleman Memorial Fund (2000)
Organization Assistance Fund (1996)
Partnership Fund (1990)
Marlene and David Persky Fund (1997)
Isabel K. Arms Fund

Vibrant throughout her long life, Isabel Kingsley Arms lived each day to the fullest and philanthropy was always part of her life.

A 1936 graduate of Mount Holyoke College, Isabel served as a lieutenant in the U.S. Naval Reserve Supply Corps during World War II, overseeing the procurement and global distribution of goods worth millions of dollars. After the war, she worked for the Massachusetts League of Women Voters and the Norton Company. Also active in nonprofits and civic affairs, Isabel was president of the Worcester Garden Club, vice president of the Worcester County Horticultural Society, and a corporator of the Visiting Nurse Association.

In 1986, she created the Clarence S. Arms Family Fund, named in honor of her father. Grantees included the Worcester Public Library, water and land stewardship programs and the Foundation’s Youth for Community Improvement fund.

Looking ahead, Isabel also included the Foundation in her will. When Isabel died in 2014 at age 99, her bequest created the $2.2 million Isabel K. Arms Fund, one of the largest posthumous gifts in the Foundation’s history.

In 2016 alone, Isabel’s fund will provide grants totaling $120,000 for Foundation leadership initiatives in early learning and family health.
Clearbrook Fund

Elizabeth and Ned Bacon created this fund with proceeds from the sale of Clearbrook Farm, the homestead in rural Vermont where Elizabeth spent her childhood.

“Our parents’ house was a place of safety and joy,” says Elizabeth, a retired elementary school teacher, who found that tending bees and an apple orchard and raising their own food taught her and her five younger siblings self-reliance. “We learned to solve problems.”

Such traits are vital to people in urban settings as well, and the Bacons intend to make grants that support innovative education projects. “We want to encourage learning ventures that bring people of diverse backgrounds together in the service of justice and peace,” says Elizabeth, who is coordinator of the college-level Clemente Course in the Humanities, which is available without charge to people in economic distress.

“We’d like to help support programs for learners of all ages – children as well as adults,” says Elizabeth, whose own long-running after school program, This is My City, engaged students at four elementary schools in exploring Worcester’s challenges and proposing solutions. “Education can’t be confined to a classroom.”

Kevin Dully Memorial Fund

Kevin and Laura Dully met during college and married two years later, in 1983. “We knew right away,” says Laura of their courtship.

The couple’s shared joy in life and gifts for friendship and family ties served them well when, just a decade later, Kevin, 33, was diagnosed with leukemia. After a bone marrow transplant failed, Kevin joined a pioneering stem cell protocol that extended his life by 18 years.

While coping with incurable side effects of the transplant, he and Laura were vigorous advocates and fundraisers on behalf of patient care. They built their dream house in Southborough and in 2002, their son Andrew was born.

After Kevin died in September 2012, Laura and Andrew wanted to honor him by giving back. “So many people have touched our lives,” said Laura. “With this fund, we can support causes that mattered to Kevin.”

Grantees include Brigham and Women’s Hospital, the Dana Farber Cancer Institute, the Leukemia & Lymphoma Society and the Scleroderma Foundation as well as scholarship funds of the Assumption College MBA Program, St. Anselm College, and Bancroft School, where Andrew is an eighth grader.

“With our fund,” says Laura, “we avoid the overhead of a family foundation, and we can start small and grow it over time.”
Newell and Betty Hale Fund (2001)
Raymond P. Harold Memorial Fund (1982)
Harris Family Fund (2001)
Harvard Pilgrim Health Care Fund for a Healthy Worcester (2013)
Frances M. Herron Fund (1997)
J and J Fund (2014)
Jeppson Memorial Fund for Brookfield (1976)
Ken and Pat Jones Family Fund (2014)
Shirley S. Kane Family Fund (2014)
Keamy Fund (2014)
William and Maureen Kelleher Charitable Fund (2008)
Kirby Foundation Fund (2007)
Augusta H. Kressler, M.D. Fund (2002)
George and Anna Krikorian Family Fund (1994)
LaVigne Family Fund (1992)
Leicester Savings Bank Fund (1997)
Anne A. Levine Fund (1995)
Peter H. and Catherine H. Levine Fund (2007)
MacLean Family Fund (2004)
Donald J. and Tina Mancini Family Fund (2014)
Marla Maykel Fund (2001)
Charles H. McDonald Memorial Foundation (2005)
C. Jean and Myles McDonough Fund (1988)
Winifred Meany Killay and Matthew Meany Memorial Fund (2003)
Metzger Family Fund (2010)
Mitra Family Joy Guru Fund (2013)
Barrett and Mahroo Morgan Donor Advised Fund (2008)
John M. Nelson Fund (1990)
Nunley Family Fund (2013)
Pakachoag Church Fund for Human Understanding (1999)
Christopher J. Paskell Memorial Fund (2004)
PEACE Fund (2014)
Town of Petersham Fund (1984)
Pitcher Family Fund (2014)
Matthew Pollini Memorial Fund (2014)
Practical Education Fund (2010)
Pyle Fund (1986)
Rawji Conservation Fund (2013)
Dan Salmon Fund (2015) NEW
Salois Family Fund (2010)
SASA Fund (2011)
Charles E. Scott Community Fund (1997)

Dan Salmon Fund

Daniel Salmon, Jr. created this donor advised fund to bring greater focus and impact to his charitable giving. “Now that I’m retired,” says Danny, “I want to make my decisions about charitable giving in a more formal way. By making grants through the Foundation, I can gain insights into community needs and track my gifts.”

Since the mid-60s, Danny and his wife Dorothy headed Salmon Health and Retirement, a network of senior living services that Danny’s parents founded in 1952. Now, the third generation of the Salmon family owns and operates the senior living enterprise.

Danny looks forward to making decisions about grants that draw on his strong roots in his hometown, Northbridge, as well as the expertise of the Foundation. “The Foundation manages the money well,” says Danny, “so I can achieve more through my philanthropic investment. And I’m very impressed with the Foundation’s board and staff leadership.”
Barbara Wasgatt Memorial Fund

Barbara Wasgatt battled nasopharyngeal cancer for 10 years with courage, hope and selflessness. Throughout her years, until she passed away in 2014, Barbara centered her life around helping others, enjoying books, and most importantly, cherishing her family. Although Barbara’s cancer wore her down over the years, she steadfastly focused on the wellbeing of others rather than on her illness.

Barbara enjoyed traveling with her family and together they shared timeless memories. She had a way of touching the hearts of everyone she met, and her ability to maintain such compassion while coping with dire hardships inspired those around her. Barbara’s abiding selflessness and the abundant joy with which she lived her life have inspired her family to continue giving in her honor. With this donor advised fund, Barbara’s family will make grants in her name to causes that honor her appreciation for the power of books to nurture imagination and intelligence in people at all stages of life.

E. Stanley and Alice M. Wright Fund

Carole L. Wright created this fund to replace a family foundation and continue the tradition of giving created by her husband David and his parents, Stanley and Alice.

Raised in Shrewsbury, Stanley was president of an office furniture company and a World War II veteran. David served as a U.S. Marine during the Korean War and then joined his father’s business. He also became an avid restorer of World War II vehicles—from tanks to command cars.

David’s 50 functioning vehicles are in the collections of the Wright Museum of World War II, in Wolfeboro, New Hampshire. He founded the museum in 1994 to showcase memorabilia that honor sacrifices on the home front as well as on the battlefield.

Carole’s fund will support this museum as well as other causes cherished by the family, including the Worcester Art Museum, the Shrewsbury Public Library, and Tower Hill Botanic Garden, where the beguiling E. Stanley and Alice M. Wright Entry Garden welcomes visitors.

“Alice would be pleased to continue her support in perpetuity through the Foundation, which serves the region that was home to her family,” says Carole. “And the Foundation’s efficient services and transparency give me ease and peace of mind.”
Richard and Jeanne Ahlquist’s eight children created this scholarship to honor their late parents’ 60th wedding anniversary and the couple’s extraordinary community service. It is awarded to Grafton High School graduates whose service contributes to the town or region.

A Little League coach and president of the Bohemian Club of Worcester, Richard served on the board of the Community Nursing Association of Grafton and the building committees of Grafton Center Elementary School and Nelson Public Library.

President of the Grafton Garden Club, Jeanne also served on the boards of the Community Nursing Association of Grafton and Worcester Visiting Nurses Association. As Governor’s Liaison, she helped bring the Tufts School of Veterinary Medicine to Grafton.

After graduating from Classical High School, where the couple became sweethearts, Jeanne attended Oglethorpe University and Richard graduated from Rensselaer Polytechnic Institute. Richard served in the Navy during World War II and then, at Leon J. Barrett Company in Millbury for 40 years, became chief engineer and vice president. While raising eight children, Jeanne and Richard also loved to dance, travel, and host overseas exchange students.
Daniel Ha Memorial Scholarship

Daniel’s family and friends created this scholarship to honor his shining spirit, compassion and love of learning. It is awarded to students from South High Community School, where Daniel was a scholar, athlete, musician and leader. Captain of both the tennis and track teams in his senior year, he performed in Band and Chorus, served as Class Treasurer, and participated in the National Honor Society, Math Club, Model Congress and Mock Trial Club. Dan was also a technology and video game enthusiast and an amateur chef. He was warm and caring, with an uncommon generosity of spirit that made him a friend to all. His peers voted him “Most Likely to Succeed,” “Most Studious” and “Most School Pride.”

After graduating from Stanford University in 2010, Daniel launched Stanford’s Student Startup Accelerator, which mentors start-up companies. Daniel died in November 2010, leaving behind his loving family and many close friends. They sustain his legacy through this scholarship fund.

Matthew Gignac Memorial Scholarship Fund (1999)
Greg’s Grant Fund (1997)
Grynsel Educational Scholarship Fund (2006)
**Daniel Ha Memorial Scholarship Fund (2015)** New
Emil Haddad Jazz Scholarship Fund (2004)
**George W. Hanson Memorial Scholarship Fund (2015)** New
Marty Hastings Memorial Scholarship (2010)
Hedin Family Memorial Scholarship Fund (2007)
Maureen Henrickson Memorial Scholarship Fund (2004)
Charles Hugo Community Service Award Fund (2007)
Debbie Anne Johnson Memorial Fund (1993)
Janica Lynn Junnila Memorial Scholarship Fund (2000)
Deborah A. Kaufman Scholarship Fund (1990)
Lawrence M. and Augusta L. Keeler Scholarship Fund (1978)
Bradford J. Kemp Scholarship Fund (2008)
Max H. and Eloise A. Kuhner Scholarship Fund (2009)
Leicester High School Football Alumni Scholarship Fund (2007)
Leicester Samaritan Nursing Association Fund (1996)
Leicester Savings Bank Scholarship (1999)
Mark MacPherson Lightbown Memorial Scholarship Fund (1980)
Lincoln Village Scholarship Fund (2001)
Mary Sahagen Lonstein Scholarship Fund (2014)
Lunenburg Opportunity Fund (1999)
Daniel Stephen Lussier Athletic Scholarship (2010)
L.W.V.O. Memorial Scholarship Fund (2010)
Lieutenant James F. “Jay” Lyons III Memorial Scholarship Fund (2001)
Frances F. Mansfield Scholarship Fund (1996)
Ben P. Masterman Scholarship Fund (2013)
Anthony E. Mickunas Memorial Scholarship Fund (1987)
Michael Minty Memorial Scholarship Fund (1988)
Patricia Proko Morris Memorial Scholarship Fund (2012)
Constantine Mina and Vasiliky Strates Moschos Scholarship Fund (2005)
Anne Carey Murphy Memorial Scholarship Fund (2001)
Nichols Academy Fels Scholarship Fund (2001)
Arnold and Sylvia Nylund Scholarship Fund (2001)
Richard W. Pierce Fund (1985)
Project Aspire Fund (2011)
Barbara Marks Rothschild Arts and Education Scholarship Fund (2004)
Ida and Murray Rotman Scholarship Fund (1985)
Andrew Sala Memorial Scholarship Fund (1998)
Doris Salzer Memorial Scholarship (2012)
**Erin Coonan Schmidt Scholarship for Health and Wellness Fund (2015)** New
Herbert D. Sherwin Memorial Scholarship Fund (2004)
George W. Hanson Memorial Scholarship

Trustees of the George W. Hanson Trust established this scholarship to fulfill Mr. Hanson’s desire to support graduates of Worcester Technical High School whose post-secondary education builds on what they learned in the school’s technical programs.

The son of Danish immigrants, George W. Hanson (1918 – 2015), grew up in Worcester with a brother and two sisters. A 1936 graduate of Worcester Manual Training School (now the Technical High School), George worked as an auto mechanic until enlisting in the U.S. Armed Forces. George served as a military police officer during and after World War II, from 1942 – 1946. After the war, he returned to Worcester and began a new career at M. Steinert & Sons, repairing and refurbishing organs and pianos. He retired 61 years later, in 2009, when the company closed its Worcester store. Then age 91, he continued doing freelance piano repair, saying, “I can’t be sitting down. I’ve got to be doing something.”

Erin Coonan Schmidt Scholarship for Health and Wellness

Erin and Bill Schmidt created this scholarship fund to foster the education of Burncoat High School graduates who share Erin’s passion for health and wellness. Preference is given to students pursuing a field dedicated to disciplines that improve the wellbeing of others.

Born and raised in Worcester, Erin graduated in 1999 from Burncoat, where she was field hockey captain and class president as well as a top student. Erin thrived at the school as both a scholar and athlete, and she valued its supportive community of students, faculty and staff.

These friends have remained at her side as she has coped with recurring bouts of breast cancer. Since her first diagnosis in 2008, Erin has gained expertise in nutrition, yoga and meditation to assist her healing, based on her belief that such practices strengthen mental and physical resilience.

With this fund, Erin and her husband as well as their many friends hope to promote the study of health and wellness among a new generation of young people.

Scholarship Funds Market Value:
$12.9 million
Designated Funds support one or more organizations in perpetuity.

Abby’s Empowerment Fund (2009)
Hollis E. and Gwendolyn D. Alden Fund (1977)
Clarence S. Arms Family Fund (1986)
Elizabeth Trumbull Barton Fund (2004)
Edward W. Bettke Scholarship Fund (2007)
Bolton Public Library Endowment Fund (2012)
Barbara Allen Booth Fund (2001)
Bosler Humane Society Fund (1986)
Bruce Breger Memorial Fund for BSA Troop 1 of Northboro (2010)
Dr. and Mrs. Edward Budnitz Fund (1995)
Polly C. and Joseph R. Carter Fund (1987)
Central Massachusetts Disaster Relief Residue Trust Fund (1980)
Richard and Deanna Charves Fund (2011)
Chesson Family Fund (1991)
Charles P. Ciaffone and Rose B. Ciaffone Fund (2005)
Martha A. Cowan Fund (1987)
Ethel S. Cunningham Fund (1987)
David L. and Elizabeth O. Dean Fund (2012)
Directors and Corporators Fund (1984)
Douglas Center Cemetery Preservation Fund (1999)
Gerald J. and Dallas M. Eydenberg Fund (2011)
Norma Feingold Worcester History Prize Fund (2011)
Shirley Feldman Fund (2005)
First Congregational Parish, Unitarian Fund (2006)
First Unitarian Church Fund (2006)
Patricia Fisher Fund (2006)
Paris and Marion S. Fletcher Fund for United Way (1992)
Marilyn M. and Russell S. Fox Scholarship Fund for Non-Traditional Students (2010)
Samuel Frank Designated Fund (1993)
Lois B. and Robert F. Green Fund (2001)
Ginette Harrison MD Memorial Fund (2002)
Hendricks House Preservation Fund (1999)
John and Frances Herron Park Fund (2013)
Honee A. Hess Partnership with Children Fund (1996)
Robert G. and Eliza C. Hess Fund (1979)
Robert M. Hyde Family Fund for Beaman Memorial Public Library (2014)
Jeppson Memorial Fund (1976)
Marcia R. Katter Memorial Fund (2001)
Lawrence M. and Augusta L. Keeler Fund (1997)
Paul J. and Dorothy B. Kervick Fund (1996)
Peter J. and Sophie Kosky Fund (1988)
Max H. and Eloise A. Kuhner Memorial Fund (2005)
Kimberley Lane Godard Memorial Fund (2012)
Nathaniel A. Lane Memorial Fund (2014)
Prescott N. Lane Memorial Fund (2014)
Peter H. Levine Fund (2010)
Peter H. Levine and Catherine H. Levine Fund for the First Unitarian Church (2010)
John W. Lund Fund (1993)
Lund Leadership Award (2010)
Lund Unitarian Church Fund (2011)
Frances F. Mansfield Fund (1996)
Sonia Werblin Masterman Fund (2001)
Howard J. and Dorothy R. McGuiness Funds (2004)
Barrett and Mahroo Morgan Fund (2007)
Vasiliky Strates Moschos Memorial Fund (2002)
Rani P. and Haribabu Muddana MD Fund (2001)
Nichols Academy Scholarship Fund (2001)
Paul M. Pezzella Fund in Memory of Patsy and Theresa Pezzella (1999)
Pomfret Community School Arts Fund (2006)
Lillian S. Pratt Fund (2007)
Hon. James F. Queenan Legal Services Fund (2011)
John and Gloria Rauth Library Fund (2001)
Renaissance Award Fund (2004)
Louise R. and John F. Reynders Fund (1987)
Marvin Richmond Fund (1998)
Chapin Riley Fund (2000)
John E. and Ethel E. Riley Outstanding Citizenship Award Fund (2010)
Katharine Higgins Riley Fund (1991)
Marion & Arthur Rossiter Fund for Evangelical Congregational Church (2011)
Saul A. Seder Fund (1991)
Kazma A. Soffan Memorial Fund (2000)
Helen M. and Thomas B. Stinson Fund (2001)
Carmen Tobin Nursing Scholarship Fund (1995)

Designated Funds Market Value: $19.1 million
Agency Funds are created by nonprofit organizations to benefit their operations or capital needs.

**William and Rose Abbott Memorial Fund**  
(2015) NEW

Abby Kelley Foster House Fund (2008)  
American Red Cross of Central Massachusetts Fund (2000)  
Father Miguel Bafaro Fund (1998)  
Barre Players Endowment Fund (1997)  
Big Brothers/Big Sisters Mentoring Fund (1999)  
Blackstone Valley Education Foundation Fund (2005)  
Boston Chinatown Neighborhood Center Funds (2011)  
Boylston Public Library Foundation Fund (2014)  
Boys & Girls Club of Worcester Fund (2008)  
Camp Putnam Agency Fund (2011)  
Dynamy Fund (1997)  

**Elm Park Center for Early Childhood Education Scholarship Fund** (2006)  
**Lois S. Feldman Fund** (1990)  
**Friends of Beaman Memorial Public Library Endowment Fund** (2011)  
**Friends of Gale Free Library Endowment Fund** (1998)  
**Friends of Hope Cemetery Fund** (2011)  
**Friends of Northbridge Elders Fund** (1997)  
**Friends of the Upton Town Library Fund** (2007)  
**Friends of the West Boylston Council on Aging Fund** (2015) NEW

**Julie Chase Fuller Endowment Fund for Mechanics Hall** (1989)  
**Green Hill Park Coalition Fund** (2015) NEW

**Roberta Gunn Fund for Board Development** (2003)  
**Hanover Theatre 1926 Society Legacy Fund** (2015) NEW

**Jane Fund of Central Massachusetts Fund** (2008)  
**Joy of Music Program Beveridge and Frances Webster Endowment Fund** (2000)  
**Latin American Health Alliance of Central Mass Fund** (2010)  
**Priscilla Mason Endowment Fund** (2014)  
**Master Singers of Worcester Fund** (2007)  
**Matthew 25 Funds** (2000)  
**Millbury Public Library Endowment Fund** (1991)  
**National Memorial Trust Fund** (1990)  
**Preservation Worcester Endowment Fund** (2011)  
**Rural Cemetery Fund** (2006)
Friends of the West Boylston Council on Aging Fund

The Friends of the West Boylston Council on Aging has transferred its assets into a new agency fund to better support the town’s senior center.

The group advocates for the center and raises funds for its trips, monthly newsletter and array of social, nutritional, health, recreational and educational programs.

“The Foundation visited us and presented its services well,” says Nancy Berakian, a board member of the Friends of the West Boylston Council on Aging. “And the Friends of the West Boylston Library had already set up a Foundation fund. The board felt safe entrusting its funds to the Foundation.

“We needed a better vehicle than CDs. With the Foundation fund, we control our money and access it as needed without penalties. And we expect a better return, which will enable us to provide more support. The center has outgrown its current quarters—a few rooms rented in an industrial building. We’re asking the town to build a senior center.”

Green Hill Park Coalition Fund

Crowning one of Worcester’s seven hills, Green Hill Park is the city’s largest park. The land was once the private preserve of Andrew Haswell Green (1820-1903), a civic leader who united New York City’s five boroughs and planned its parks. In 1905, Green’s heirs sold the land for a modest fee to the City of Worcester.

Civic spirit continues to cultivate the park. The Green Hill Park Coalition, Inc., supports projects that enhance the park’s natural and cultural resources, which include ponds, picnic groves, a golf course, and hiking trails.

A new Foundation fund enables the nonprofit to do more with its donor contributions.

“Our money was earning low rates in CDs,” says Brian McCarthy, Coalition president. “Our Foundation fund is safe and gains a higher rate of return. And it builds the endowment that the Foundation can use to benefit our city. It’s a win-win. This decision was easy, and gained the unanimous approval of our board.”

Hanover Theatre 1926 Society Legacy Fund

With the restored 1926 Poli Palace Theater as its home, The Hanover Theatre for the Performing Arts has once more turned Worcester into a destination for touring productions of international renown. The grand performance center is also a cherished venue for community productions.

Performers and audiences alike enjoy the period charm and state-of-the-art conveniences of the Beaux-Arts-style theater, designed by architect Thomas White Lamb (1871–1942), whose marquee projects also included the Boston Opera House.

By creating an agency fund, The Hanover Theatre for the Performing Arts begins an endowment for its future. Donors become members of the 1926 Society Fund, the theater’s legacy society, and access the Foundation’s depth of planned giving services.

“Performers and audiences alike enjoy the period charm and state-of-the-art conveniences of the Beaux-Arts-style theater, designed by architect Thomas White Lamb (1871–1942), whose marquee projects also included the Boston Opera House.”

“By creating an agency fund, The Hanover Theatre for the Performing Arts begins an endowment for its future. Donors become members of the 1926 Society Fund, the theater’s legacy society, and access the Foundation’s depth of planned giving services.”

“We’ve become one of our region’s premier cultural institutions,” says Troy Siebels, president & CEO of The Hanover Theatre for the Performing Arts. “Now, we can build our long term stability through an endowment. Planned gifts will enable us to grow our acorn into a tree.”
**Straight Ahead Ministries Fund**

About 68 percent of juvenile offenders return to crime. But among the youth served by Straight Ahead Ministries, Inc., the recidivism rate is less than 15 percent.

Straight Ahead provides juvenile offenders with the structure and support to turn the crisis of arrest into the start of a new life. The Worcester-based interdenominational juvenile justice ministry operates in 35 countries. In 2014 its regional programs served 7,413 incarcerated juveniles at 60 facilities throughout New England.

After release, its reentry program offers such services as pre-employment training at local businesses. More than 500 youth participated in the program last year, with 42 employed at the Straight Up Café; the New You thrift store; Straight Up Catering; and Straight Ahead Silkscreen.

“The kids are not job-ready when they start,” says Scott Larson, president and executive director of Straight Ahead. “But within months, we’re able to place them in jobs within the community.”

“We’ve valued our longstanding relationship with the Foundation as a grantee,” says Scott. “Now, with our fund, we’re happy to be working even more closely with the Foundation.”

**Wachusett Earthday Inc. Fund**

Wachusett Earthday, Inc. promotes recycling and reuse for a healthy watershed community through the Wachusett Watershed Regional Recycle Center. An all-volunteer nonprofit, the organization has developed a partnership with the Massachusetts Department of Conservation and Recreation and seven Wachusett towns with support from the Department of Environmental Protection. These partnerships have enabled the nonprofit to expand services and to build a dedicated facility. Located in West Boylston, the new center offers area residents a place to both acquire and deposit used household items—from appliances and books to home décor items, sports equipment, toys, and furniture, as well as safely disposing of hazardous products.

Its new agency fund will enable the nonprofit to build an endowment that supports its growing operations, notes Colleen Abrams, Wachusett Earthday founder. “After 25 years, we are transitioning into a sustainable organization,” says Colleen, “The Foundation provides excellent stewardship for our funds, and also strengthens us through its Nonprofit Support Center. The Foundation does more than just grow our money. It also helps us grow our organization.”

St. Mary’s Assumption Albanian Orthodox Church Endowment Fund (2012)

**Straight Ahead Ministries Fund** (2015) **NEW**

Tatnuck Brook Watershed Fund (1996)
Temple Emanuel Sinai Fund (2007)
Touchstone Community School Funds (2005)
United Way of Central Massachusetts Fund (1987)

**Wachusett Earthday Inc. Fund** (2015) **NEW**

West Boylston Historical Society Fund (2014)
Women’s Initiative Fund in Honor of Lois B. Green (2009)
Worcester Area Association for the Education of Young Children Fund (1998)
Worcester Chamber Music Society Fund (2013)
Worcester County Poetry Association Funds (2002)
Worcester Jewish Community Center Fund (2010)
Rev. Richard and Shirley Wright Emmanuel Baptist Church Endowment Fund (1994)
Youth Opportunities Upheld, Inc. Fund (1987)

**Agency Funds Market Value:** $18.6 million
CREATING YOUR LEGACY: The Acorn Society

The Acorn Society honors individuals whose estate planning includes a gift to the Foundation. Just as an acorn grows into a mighty oak, a planned gift will yield enormous benefits to future generations.

You can join the Acorn Society by deferring your gift and naming the Foundation in your will. Or create a planned gift that provides you with lifelong, tax-sheltered income. Acorn Society members are invited to special events and above all they enjoy the satisfaction of knowing that their giving lives on. We are grateful to every member of the Acorn Society, including those who prefer to remain anonymous.

For a confidential conversation, call us today.

2015 Members
Anonymous (8)
Robert S. Adler
Ann Bergman and Bill Glennon
Edward W. Bettko
Mark P. Bilotta and Henry O. Ritter
Brian L. and Betty G. Bjurling
Maurice J. and Pamela K. Boisvert
Cushing C. Bozenhard
Michael D. and Mary Ann S. Brockelman
James R. and Paula R. Buonomo
Kenneth F. and Nancy Candito
Richard and Deanna Charves
Richard P. Coonan
Dix F. and Sarah B. Davis
James S. Demetry
Henry B. and Jane K. Dewey
Robert E. Dik*
Ross K. and Lisa F. Dik
Richard and Carol Dymek
Barbara M. Fits
Warner S. and Mary F. Fletcher
Gerald and Jane Freed
Dina and Gerald L. Gaudette III
Rodney M. Glasgow Jr.
Dennis F. and Frances C. Gorman
Suzanne E. Gray and Ernest J. Osterman
David R. and Rosalie A. Grenon
Claire L. Halvey
Maureen Harrington
Richard E. Hedin
Nason A. Hurowitz and Martha P. Grace
Sona Huscisian
Donald Inglis
Forrest A. and Shirley H. Jacobs
M Howard and Frances Jacobson
Kenneth R. and Patricia L. Jones
Pamela B. Kane and Roy T. Charette
Sarah Lange
David P. Leach and Audrey Klein-Leach
Catherine H. Levine
Margaret D. Lincoln
Ann T. Lisi
Mónica Escobar Lowell
C. Jean McDonough
Satya B. and Supriya Mitra
Raymond E. and Barbara B. Morin
Frederic H. and Victoria Mulligan
Linda C. Nelson
Karen M. Nunley
Vincent J. Osterman
Martha R. Pappas
Bonnie M. Prescott
James F. and Helen E. Queenan
John A. and Gloria W. Rauth
Azim Rawji and Robin Van Liew
William J. and Mary C. Ritter
C. Reid and Susan Roberts
Linda Carlson Romano
Scott and Lois Rossiter
Paul and Fay Rossley
R. Joseph Salois
Sally S. Schenck
Evelyn B. Silver
Laurence J. and Alison D. Specter
David C. Steelman and
Virginia Theo-Steelman
Kelly A. Stimson
Joseph N. and Charlene M. Stolberg
Cynthia P. Strub
Cynthia C. Taylor
Laurie D’Amico Tigan
Sumner B. Tilton Jr.
Margaret Wolcott
Richard B. Wolf*
David K. Woodbury
Kimball R. Woodbury

Acorn Society members
Satya and Supriya Mitra created a donor advised fund that benefits the vision impaired and also named the Foundation as a beneficiary in their will.

“The Foundation does so much for this community,” says Satya, a Foundation corporator, “and makes it easy for individuals to have an impact.

“We came here from India 35 years ago, raised our sons here and built our business. We are grateful to this community for our success. We love this city and its ethnic diversity and cultural strengths. We want to infuse this feeling for the community in our two sons, and keep making it a better place long after we’re gone.”

*Deceased
In 2015, the Foundation received $6,004,353 in gifts. Of this amount, $2,866,633 was added to existing named funds and $3,137,720 created 17 new named funds. We list contributors of $2,500 or more and extend our sincere gratitude to all who made a gift during the year.

2015 GIFTS BY FUND TYPE
(in millions)

$1,000,000 +
Estate of Isabel K. Arms

$10,000 – $99,999
Anonymous (1)

$5,000 – $9,999
Henry Damon

$50,000 – $99,999
Victor Ambros and Rosalind Lee
George W. Hanson Trust
Melanie and B. Dale Magee
Temple Emanuel Sinai
Worcester County Food Bank

$2,500 – $4,999
Robb B. Ahlquist
Auburn Woman’s Club
Edward W. Bettke
Boston Chinatown Neighborhood Center, Inc.
Camosse Family Foundation
Ross K. and Lisa F. Dik
Fels Family Foundation
Allen W. Fletcher
David R. and Rosalie A. Grenon
Guru Tax & Financial Services, Inc.
Paul and Fay Rossley
Stoddard Charitable Trust
Wachusett Earthday
Arno and Roberta E. Wagner Scholarship Fund
Donna L. and Henry R. Whittier Jr.
Worcester Chamber Music Society
E. Stanley and Alice M. Wright Foundation

Every effort has been made to ensure the accuracy of this list. If we have made an error, please let us know.
The goal of the Foundation’s investment program is to preserve and enhance the value of donor gifts, maintain capital for the future and meet community needs today. To accomplish this goal, we sustain a diversified portfolio overseen by multiple managers.

**INVESTMENT COMMITTEE**
The Foundation’s Investment Committee is comprised of financial experts from the community that establish policy, hire investment managers, and evaluate performance. The committee is supported by independent investment consultants Prime Buchholz & Associates, which provides technical assistance, manager selection, and ongoing evaluation.

### 2015 Members
- Timothy M. Jarry *Chair*
- Robert S. Adler
- Thomas J. Bartholomew
- J. Christopher Collins
- James E. Collins
- Dix F. Davis
- Warner S. Fletcher
- Abraham W. Haddad
- Jeffrey S. Solomon

**PORTFOLIO**
- Domestic Equity | 3 managers
- International Equity | 7 managers
- Flexible Capital | 5 managers
- Fixed Income | 3 managers
- Real Assets | 3 managers
- Cash

---

**SUMMARY FINANCIAL STATEMENTS** *(Years ended December 31, 2015 and 2014)*

<table>
<thead>
<tr>
<th>ASSETS</th>
<th><strong>2015</strong></th>
<th><strong>2014</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments</td>
<td>$135,246,233</td>
<td>$138,595,761</td>
</tr>
<tr>
<td>Operating Cash</td>
<td>$169,680</td>
<td>$269,886</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$157,391</td>
<td>$124,904</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$135,573,304</td>
<td>$138,990,551</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th><strong>2015</strong></th>
<th><strong>2014</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable &amp; Accrued Expenses</td>
<td>$96,123</td>
<td>$165,038</td>
</tr>
<tr>
<td>Split-interest Obligations (Charitable Gift Annuities, other)</td>
<td>$886,771</td>
<td>$1,017,202</td>
</tr>
<tr>
<td>Net Assets</td>
<td>$134,590,410</td>
<td>$137,808,311</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td>$135,573,304</td>
<td>$138,990,551</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REVENUES</th>
<th><strong>2015</strong></th>
<th><strong>2014</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$6,004,353</td>
<td>$6,011,416</td>
</tr>
<tr>
<td>Net Investment Returns</td>
<td>$(2,017,977)</td>
<td>$3,714,003</td>
</tr>
<tr>
<td>Other</td>
<td>$127,488</td>
<td>$18,434</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td>$4,113,864</td>
<td>$9,743,853</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GRANTS &amp; EXPENSES</th>
<th><strong>2015</strong></th>
<th><strong>2014</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$5,743,209</td>
<td>$5,883,575</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>$1,588,556</td>
<td>$1,648,557</td>
</tr>
<tr>
<td><strong>TOTAL GRANTS &amp; EXPENSES</strong></td>
<td>$7,331,765</td>
<td>$7,532,132</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGE IN NET ASSETS</th>
<th><strong>2015</strong></th>
<th><strong>2014</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NET ASSETS, beginning of year</strong></td>
<td>$137,808,311</td>
<td>$135,596,590</td>
</tr>
<tr>
<td><strong>NET ASSETS, end of year</strong></td>
<td>$134,590,410</td>
<td>$137,808,311</td>
</tr>
</tbody>
</table>

The audit of the Foundation’s financial statement as of and for the years ending December 31, 2015 and 2014 was conducted by Alexander, Aronson, Finning & Co., PC. For a complete copy of the audited financials visit our website at www.greaterworcester.org or email donorservices@greaterworcester.org.
CORPORATORS

Lawrence J. Abramoff
Colleen Abrams
Robert S. Adler
Jay Z. Aframe
Robb B. Ahlquist
Kola Akindele
Maria A. Allard
Robert J. Anderson
James A. Andreoli
David P. Angel
Roy Angel
Michael P. Angelini
Ann Marie Argitis
Joycelyn Augustus
Abigail Averbach
Robert S. Bacheleder
Joseph J. Bafaro Jr.
Richard C. Barry
Thomas J. Bartholomew
John E. Bassett
Eric Batista
Matthew Beaton
Paul Belisto
Sarah G. Berry
Mark P. Bilotta
Janet A. Birbara
Deborah Bitsoli
Elissa Boisvert
Mauro J. Boisvert
Pamela K. Boisvert
James Bonds Sr.
George F. Booth II
Sarah Ann Bowditch
Cushing C. Bozenhard
Kevin L. Bradley
James B. Broadhurst
Michael D. Brockelman
Denise H. Brookhouse
Denise Brotherton
Paula A. Brouillette

John H. Budd
James R. Buonomo
Henry Camosse Jr.
Gail E. Carberry
Jennifer Davis Carey
Ann E. Carlson
Kirk A. Carter
Deborah D. Cary
Matilde Castiel
Linda A. Cavioli
Francesco C. Cesareo
Harriette L. Chandler
Brian M. Chandley
Victoria Twumasi Chavis
Joy C. Child
Jeffrey Chin
Ronald M. Cino
Valerie Cohen
J. Christopher Collins
James E. Collins
Michael F. Collins
Michael Covino
Joseph P. Cox
Tracy A. Craig
Ken Crater
Benjamin Craver
Michael J. Crawford
John W. S. Creedon Jr.
Frederick G. Crocker Jr.
Jill C. Daglis
Dix F. Davis
Laurie Davis
Daniel de la Torre Jr.
Richard W. Dearborn
Eileen R. deCastro
Henry B. Dewey
Morgan B. Dewey
Ross K. Dik
James C. Donnelly Jr.
Timothy J. Downs
Don Doyle
Francis X. DuFaut Jr.
Karen E. Duffy
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N. Lynn Eckehrt
Patty Eppinger
Stephen J. Erickson
Alen Falke
Barbara E. Fargo
Saul F. Feingold
Randy Feldman
Emily R. Ferrara
Allen W. Fletcher
Mary F. Fletcher
Warner S. Fletcher
Jack L. Foley
Paul A. Fontaine
David P. Forsberg
Ron Fraser
Mark W. Fuller
Gerald M. Gates
Gerald L. Gaudette III
Lisa Kirby Gibbs
Lawrence J. Glick
Lorista J. Goldsberry
Juan Gomez
Dennis F. Gorman
Martha P. Grace
John E. Graham
Cynthia Gray
Martin J. Green
David R. Grenon
J. Michael Grenon
Jabir Gutierrez
Abraham W. Haddad
Sheila Harrity
Ernest S. Hayeck
Jeanne Hebert
John Herron Jr.
Honec A. Hess
Calvin Hill
Emily G. Holdstein
W. Patrick Hughes
Kathryn Zingier Hunter
Michael E. Huppert
M Howard Jacobson
Timothy M. Jarry
Robert E. Johnson
Patricia L. Jones
Michelle Jones-Johnson
Kevin R. Kearney
Alison C. Kenary
Richard B. Kennedy
Robert M. Kennedy
Priscilla Short Kerr
Judith Kirk
Joyce R. Kressler
Leonid Kustanovich
Frances E. Langille
Joshua LaPan
Robert E. Layne
Thuha T. Le
Diane L. Leclair
Laurie Leshin
Patsy C. Lewis
Joseph Lian Jr.
Robert G. Lian
Linda Carre Loof
Stephen B. Loring
Mónica Escobar Lowell
Susan M. Mailman
Michael J. Martin
Samuel N. Martin
Heather A. Maykel
C. Jean McDonough
Nadia McGourthy
Robert McLaren
Cynthia M. McCullen
Jean G. McMurry
Christopher G. Mehne
John F. Merrill
Peter Metz
Katherine H. Metzger
Erwin H. Miller
John O. Mirick
Frederick M. Misilo Jr.
Satya B. Mitra
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Charles F. Monahan Jr.
Janet Wilson Moore
Barrett Morgan
Gail M. Morgan
Laurence S. Morrison
Robert J. Morton
James M. Moynihan
William G. Muller
Frederic H. Mulligan
Timothy P. Murray
Ginger Navickas
Leopoldo Negrón Cruz
A Vi Nguyen
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Andrew B. O’Donnell
Kevin O’Sullivan
David R. Ojerholm
Vincent J. Osterman
Joseph L. Pagano
Martina R. Pappas
Sahdev R. Passey
Thurid Pederson
Deborah A. Penta
Neil Petersen
Jacqueline D. Peterson
Paul M. Pezzella
Lisa A. Piehler
Cynthia N. Pitcher
Jason J. Port
Christine M. Proffitt
Marla Maykel Pyle
Richard L. Pyle
Raymond Quinlan
Hilda Ramirez
Jose Ramirez
Kenneth Reed
Mary Jane Rein
Dennis Rice
Mary C. Ritter
Sarai Rivera
Shelley Rodman
Eric Roldan
Melvin Rosenblatt
Laurie Ross
Scott Rossiter
Paul R. Rossley
Steven Rothschild
Kent Russell
Francis M. Saba
Brenda K. Safford
Nancy H. Sala
Andrew Salmon
R. Joseph Salois
Steven M. Sargent
Kwasi Sarpong
Paul F. Schakler
Francis J. Scollen
Paul F. Scully
Carol L. Seager
Sara Kelleher Sears
Jay S. Sherwin
John F. Shoro
Philip O. Shwachman
Troy Siebens
Marvin S. Silver
Edward D. Simians
Michael D. Sleeper
Troy B. Thompson
Mark Spuria
Tim Thomas
Carolyn J. Stempler
Mark Spuria
Troy B. Thompson
Adi Tibrewal
Sumner B. Tilton Jr.
David N. Tinsley
Eric Torkornoo
Roger R. Trahan Jr.
Margaret W. Trains
Tuyet Tran
Alexis Travis
John A. Trobaugh
Michael P. Tsotis
Jayna Turchek
Wayne Ushman
Charles R. Valade
Carmen D. Vazquez
Wyatt R. Wade
William D. Wallace
Matthew Wally
Mathias Waschek
Charles S. Weiss
James A. Welu
Meridith D. Wesby
Todd H. Wetzel
David White
Harry T. Whitin
Thomas J. Wickstrom
Michael Wilcox
Donna M. Williams
Jack L. Wolfson
David K. Woodbury
Janice B. Yost
Alex Zequeira
Kelsa L. Zereski
Robert Zibinskas
Tina Zlody
YOUR INVITATION TO LEADERSHIP

Create a fund with the Foundation to improve your world in your own way—now and in perpetuity.

Your fund fulfills your intentions in your name or in honor of a loved one. Its interest generates grants year after year while its principal grows as part of the Foundation’s strong, well-managed endowment. As a result, you extend the value and reach of your philanthropy.

You create the fund and we do the rest—handling all administration and grant making on your behalf.

Each year, the Foundation distributes grants from your fund according to your wishes.

Philanthropy can be a complex endeavor. The Foundation’s comprehensive planning and administrative services and deep knowledge of the community and its needs can help you achieve the most impact with your charitable investment.

And as a Foundation donor, you have opportunities to take part in events that explore current and emerging issues in our community and volunteer on committees that review grant proposals, recommend grantees and evaluate the progress of promising programs.

CREATE A FUND

Establish a fund by making a gift of $10,000 or more. Choose the type of fund that suits your interests:

- **Designated Funds** support one or more organizations in perpetuity.
- **Discretionary and Field of Interest Funds** allow the Foundation to make grants in response to pressing community needs.
- **Donor Advised Funds** allow you to make grant suggestions at your convenience to organizations that matter to you.
- **Scholarship Funds** support post-secondary education of high school graduates.

MAKE A PLANNED GIFT

A planned gift can offer financial advantages now while securing your charitable legacy. The Foundation offers many planned giving options. For example, you can…

- Name the Foundation in your will or as the beneficiary of IRA assets
- Transfer a life insurance policy, making premium payments tax-deductible
- Donate real estate as a future gift while using the property throughout your lifetime
- Set up a charitable gift annuity to receive tax-free income now while benefiting your cause in perpetuity.

Contact us today to find out how the Foundation can help you meet your philanthropic goals.

Boys & Girls Club of Worcester is home to In Da Zone, award-winning dancers.
IN MEMORIAM

The Greater Worcester Community Foundation family lost several treasured friends during 2015, including...

Robert Achorn
Arthur E. Chase
Christos Cocaine
Robert E. Dik
John A Duggan MD
Leona Eppinger
Dorothy Erikson
Howard G. Freeman
Aaron Goodale III
Augusta H. Kressler MD
Aaron Lazar MD
Sarah D. Pettit
Cecelia Summers-Grynsel
Margaret Torgersen

STAFF

Ann T. Lisi
President & CEO

Diane S. Allain
Accounting Officer

Jonathan Cohen
Program Officer

Maureen Harrington
Senior Development Officer

Christopher M. O’Keeffe
Vice President for Program

Mark Onanian
Finance Assistant

Gail T. Randall
Special Projects Officer

Beckley W. Schowalter
Scholarship Program Manager

Sarah Shugrue
Program Officer

Kelly A. Stimson
Director of Donor Services

Jasmine Vasquez-Okutoro
Administrative Assistant

Jacqueline L. Williams
Office Assistant

Production Credits:
Writer Susan Saccoccia
Designer Katherine Canfield
Photographer Dan Vaillancourt
Production Manager Kelly Stimson
Printer Kirkwood Printing
OUR MISSION

To enhance our community, now and in the future, through philanthropic leadership.