By the Numbers 2012

At a Glance

- Total Assets: $124,690,268
- Contributions: $3,507,930
- Number of Gifts: 1,284
- Number of Donors: 1,090
- Investment Returns: 11.2%
- Grants and Scholarships Approved: $5,339,092
- Number of Grantee Organizations: 506
- Number of New Funds: 16
- Total Named Funds: 487

Our Fund Types

- Donor Advised: $15,565,535
- Designated: $16,661,194
- Scholarship: $12,651,491
- Field of Interest: $14,398,881
- Committee Advised: $24,752,559
- Discretionary: $22,934,430
- Agency: $15,688,621
- Total Market Value: $122,652,711

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Approved Grants by Fund Type 2012

Total $5,339,092

- Donor Advised
- Designated
- Scholarship
- Field of Interest
- Committee Advised
- Discretionary
- Agency

Approved Grants by Broad Category 2012

Total Awards $5,339,092

- Health & Human Services: $1,902,983
- Arts: $917,993
- Environment: $289,696
- Community Development: $700,133
- Education: $1,438,337
Dear Friends,

In 2012, the Foundation achieved another strong year, distributing more than $5 million in grants and increasing our endowment by 11.2 percent. Both grantmaking and stewardship advance our mission to improve the quality of life in Worcester County.

The Foundation works because it provides common ground for people in all walks of life to share their knowledge, talents and resources on behalf of our community.

Donors entrust us with their visions of community betterment. Families and individuals transform assets in one form—a house, cash—into something else of value, such as the education of a young person, affordable dental care, or a vital community service. In 2012, bequests from three donors totaling more than $1.4 million created four new endowed funds. We are grateful to the members of our Professional Advisors Network who help their clients use our services to meet their goals.

Connecting through the Foundation, leaders of nonprofit organizations find new allies in each other as they strive to meet the pressing challenges of Worcester County. In 2012, we brought together 13 nonprofits in a first-ever integrated funding endeavor—our pioneering Education Initiative. Its goal is to transform life and school outcomes for vulnerable children by meeting inter-related needs. These grants will expand ESL programs for parents and add life skills training, fund closer alignment of education from preschool years through grade three, and expand summer and after-school learning.

Recognizing that long-serving agency leaders are retiring in large numbers, the Foundation convened 22 new executive directors. Started in 2013, the sessions are helping these new leaders learn more about our community and each other.

The Foundation is a constant, facilitating continuous transformation and growth in our community. Thank you for joining us.

Sincerely,

Ann T. Lisi
President and CEO

R. Joseph Salois
Chairman

Joe Salois and Ann Lisi guide Foundation activities that support nonprofit organizations in Central Massachusetts.

“Families and individuals transform assets in one form—a house, cash—into something else of value, such as the education of a young person…or a vital community service.”

On front and back covers:
Students from Worcester East Middle School participate in Broad Meadow Brook Wildlife Sanctuary’s Let’s Go program, a program that promotes physical fitness by getting youth outdoors through activities such as hiking, canoeing, bicycling, and snowshoeing.
### Stewardship
- Increased value of endowment portfolio by 11.2%
- Received contributions totaling $3,507,932
- Received bequests of more than $1.4 million that created four new endowed funds

### Donor Services
- Hosted Foundation’s first annual scholarship reception in January at Clark University, with Joseph O’Brien as its keynote speaker and remarks from scholarship recipients Laura Bercume and Achelles Bellos
- Held the Foundation’s annual Winter Supper at Worcester Area Mission Society, with panelists Rev. Robert S. Bachelder, James A. Welu and Wyatt Wade sharing reflections on urban philanthropy
- Convened 37th Annual Meeting at Mechanics Hall on May 15, with remarks by Dr. B. Dale Magee, public health commissioner of Worcester

### Professional Advisors Network (PAN)
- Organized a members’ conference in June at the College of the Holy Cross, featuring workshops and keynote speaker Duncan Richardson of Eaton Vance Investment Managers
- Hosted an Appreciation Day for advisors, with an insiders’ tour of Gateway Park on Worcester Polytechnic Institute campus

PAN members tour WPI’s Gateway Park, a center of bioscience research and enterprise.

Enjoying the Winter Supper event at Worcester Area Mission Society were (from left) Wallace Andrews, Ann Lisi, Dorothy Andrews and Wyatt Wade.
Grantmaking
- Distributed more than $5 Million, including $573,924 in scholarships
- Conducted 13th year of Youth for Community Improvement program, through which 16 high school students distributed grants totaling $20,963 to six nonprofits for projects in social education and wellness; abuse prevention; and college and career preparation
- Transitioned to an online grant application system
- Launched pioneering Education Initiative to transform academic outcomes for disadvantaged students through programs spanning infancy and early childhood through middle school and adult education
- Partnered with MassNeeds, statewide consortium of grant makers addressing food, fuel and shelter shortages
- Made first grants from Worcester County Food Bank Fund to End Hunger, providing $38,912 to 14 hunger relief nonprofits serving Worcester County
- Offered learning sessions on GLBT Youth and their Families and Issues Facing Non-Profits

Nonprofit Support Center
- Conducted focus group with young leaders of nonprofits to identify their priorities and training needs
- Developed funding to help organizations with transition planning and support incoming leaders
- Held annual Summer Social, with representation from 63 local nonprofits

Duncan W. Richardson, CFA, executive vice president and chief equity investment officer of Eaton Vance Corporation, addressed the Professional Advisors Network at its Philanthropic Planning Conference.

Annual meeting speaker B. Dale Magee, MD, addressed top local health risks.
DONOR ADVISED FUNDS

John J. and Elaine C. Cahill Family Fund
John and Elaine created this donor advised fund to carry out their philanthropic interests and involve their three daughters in giving back to the community.

Meridith D. Wesby Founders Fund
Created in honor of Meridith D. Wesby, a co-founder of the Women’s Initiative (a program of the United Way of Central Massachusetts), this fund will support activities that promote leadership in women and girls.

Courtney C. Wetzel Memorial Scholarship Fund
Todd Wetzel created this fund in memory of his wife, Courtney, to celebrate her love of teaching children and lifelong commitment to her profession. This fund assists students with learning disabilities to attend schools that focus on their special needs as well as other programs that enable children to maximize their potential.

DESIGNATED FUNDS

David L. and Elizabeth O. Dean Fund
Longtime Worcester residents Liz and Dave Dean created this designated fund through a bequest to support their cherished causes in perpetuity. Grantees include All Saints Church, Audio Journal, Children’s Friend, Elder Services, Family Services, Preservation Worcester and Worcester County Horticultural Society.

Kimberley Lane Godard Memorial Fund
Cynthia and Warren C. Lane Jr., created this fund in memory of their daughter Kimberley. Every year, its grants will benefit the Make-a-Wish Foundation of Massachusetts and Children’s Friend in Worcester.

Irving A. and Marie C. Lepore Fund
This designated fund supports Elder Services of the Worcester Area, and other organizations that provide valuable services to the elderly residents of Worcester County.

SCHOLARSHIP FUNDS

Alumni Scholarship Fund
The Foundation created this fund to engage students who have received scholarships. An Alumni Committee will finalize a name, choose selection criteria and award the first scholarship in 2013.

William P. and Carolyn C. Cannon Scholarship Fund
Born in Millbury, Carol A. Cannon created this fund to honor her parents and to benefit her hometown. A dedicated educator for many years, Carol designed this scholarship, which will provide Millbury High School graduates with meaningful financial assistance throughout their undergraduate years.

Lieutenant Colonel Irving A. and Colonel Marie C. Lepore Fund
Marie, an officer in the Civil Air Patrol, and Irving, a U.S. Army officer, met each other while serving in World War II. They established this scholarship for students pursuing a degree in aviation or aerospace science, with a preference to current Civil Air Patrol Cadets.
**Emanuel’s Empowerment Fund**  
Hossein Hakim, PhD, assoc. prof. of electrical and computer engineering at WPI, believes that students must prepare for a boundlessly interconnected world. Dr. Hakim established this scholarship to recognize the many contributions Prof. Emanuel has made to the personal development and education of WPI students. Prof. Emanuel joined WPI in 1974 and is currently a prof. of electrical and computer engineering. His love for the students and passion for education earned him his colleagues’ respect.

**Patricia Proko Morris Memorial Scholarship Fund**  
Family members created this scholarship to honor Patricia Proko Morris, who taught science for 35 years at Wachusett Regional High School. Its scholarships will support graduated seniors who plan a major related to science or medicine.

**Doris Salzer Memorial Scholarship**  
In honor of long-serving Worcester Public Schools psychologist Doris Salzer, PhD, (1917-2012), a Clark University graduate, this scholarship fund supports college-bound seniors of area high schools who plan to study psychology or a related field. Its founders write, “When we are reminded that happiness lies in giving, we will remember her.”

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**AGENCY FUNDS**

**Bolton Public Library Endowment Fund**  
Bolton’s public library began in 1859 as a few shelves of books in Bolton Town Hall. In 1901, Misses Anna and Emma Whitney presented the town with a gift of $10,000 to build a library in memory of their father, Captain Joseph Whitney. Its building on Main Street opened in 1904. Today, the library houses more than 39,000 items, including books, magazines, newspapers, music, and movies. The Trustees of the Bolton Public Library established this endowment to provide for future needs of the library.

**Scoutmaster Harold “Jack” Jackson and Eagle Scout Jonathan Scott Gendron Campership Fund for BSA Mohegan Council, Inc.**  
Alumni of Worcester’s Troop 8 created this endowed campership fund, which will help campers in financial need attend Treasure Valley Scout Reservation and take part in activities that build character, confidence and leadership skills. The troop’s tribute to beloved Scoutmaster Harold “Jack” Jackson also honors the memory of Eagle Scout Jonathan Scott Gendron, whose life exemplified the values he learned from his family and during joyful summers at Treasure Valley.

**St. Mary’s Assumption Albanian Orthodox Church Endowment Fund**  
In August 1911, a group of Albanians in Worcester founded a Chapter of St. George’s Cathedral of Boston, which four years later became the Church of St Mary’s Assumption. In 1979, the parish purchased acreage on Salisbury Street and built its Byzantine-style church, which held its first liturgy in 1982. Anticipating its 100th anniversary in 2015, the parish created this agency fund to invest in its new century of service to the community.

**Morris and Ethel Abramoff Joy of Music Scholarship Fund**  
The family and friends of Morris and Ethel Abramoff established this scholarship in 1996 to celebrate the couple’s 50th wedding anniversary and shared love of music. The fund provides need-based financial aid to students attending the Joy of Music Program, which in 2012 transferred the fund to the Foundation. Now that is an endowed fund, its scholarships will honor the Abramoffs in perpetuity.
### Donor Advised Funds

- Isabel K. Arms Fund (2005)
- Jane Bath Fund (2007)
- The JoAnn Waite Bennett Memorial Fund (2010)
- Bowditch & Dewey Fund (1990)
- Bozenhard Charitable Fund (2005)
- James C. and Glenna A. Brunner Memorial Fund (2011)
- George S. and Tammy Butler Fund (2007)
- Marcia Butzel Fund (2001)
- John J. and Elaine C. Cahill Family Fund (2012)
- Maureen Logan Coghlin Fund (2001)
- Paul E. Cohan Fund (2000)
- The Dr. James J. Convery and Tracy A. Craig Fund (2009)
- Elizabeth A. Culhane Memorial Fund (2000)
- Jeanne Remillard Curtis Fund (1999)
- Rosemary Davis Memorial Fund (2000)
- Dana L. DeAngelis-McDonald Memorial Fund (2002)
- Theodore and Marjorie M. Deitz Fund (1993)
- Carolyn Knight Dik Fund (1998)
- Ross and Lisa Dik Fund (1993)
- Lillian Knowles Eldred Fund of Pakachoag Church for the Support of Sacred Music (1999)
- Gordon Iver and Dorothy Brewer Erikson Fund (1996)
- Francis A. Ford and Shirley A. Doyle Fund (2011)
- John V. Frank Fund for Pomfret Area (2011)
- Barbara H. Gaudette Fund (2007)
- Lillian R. Goodman and Mary K. Alexander Fund for Nursing Education and Research (1999)
- David R. and Rosalie A. Grenon Fund (1986)
- Newell and Betty Hale Fund (2001)
- Raymond P. Harold Memorial Fund (1982)
- Harris Family Fund (2001)
- The Hedin Family Memorial Emergency Fund (2007)
- Frances M. Herron Fund (1997)
- Kirby Foundation Fund (2007)
- George and Anna Kriorkian Family Fund (1994)
- The LaVigne Family Fund (1992)
- Anne A. Levine Fund (1995)
- Peter H. and Catherine H. Levine Fund (2007)
- MacLean Family Fund (2004)
- Marla Maykel Fund (2001)
- Charles H. McDonald Memorial Foundation (2005)
- C. Jean and Myles McDonough Fund (1988)

### Trust in Kids Fund

Clinicians and educators who practice here and in developing countries, pediatricians Louis E. Fazen III, MD, and N. Lynn Eckhart, MD, MPH, DrPH, created this donor advised fund to advance the health and welfare of children.

“We're carrying on the values of our parents, who taught us about responsibility to the greater community,” says Dr. Eckhert. “While our children were in high school, we made a grant to the YMCA and they worked with Y staff to help select grantees. They saw how small gifts make a big difference. With $200, they bought the instruments for a toddlers’ music program.”

“Our grantees include youth programs at First Baptist Church and Old Sturbridge Village,” says Dr. Fazen. “When gas prices jumped up, some schools couldn’t send kids to the Village. A small grant kept those busses rolling.

“Each year we fund a UMass medical student to work in a developing country through the Massachusetts Medical Society,” Dr. Fazen continues. “So many immigrants struggle to accommodate our culture. Understanding people in their own environment makes a world of difference.”
Wynne Chase believed in promoting independence and helping those with the inner strength and open mind to help themselves. When Wynne succumbed to cancer after a four-year fight, her husband Arthur and their children, together with close friends, created this community resource to give new life to her values.

The fund invests in services that empower women and others in times of transition to take charge of their lives. Most of its grants have supported the Annette Rafferty Survive to Thrive Fund at Abby’s House, a Worcester nonprofit serving homeless women.

“Both Wynne and I were born and raised in Worcester, where our community foundation is the best organization to handle this fund and achieve what we want to do. Annette Rafferty is the founding head of Abby’s House, which does great work that is consistent with Wynne’s values. Wynne would want to be a part of it.

“This donor advised fund lets our children and me have a say in how we give back to our community. We can choose what we think will accomplish the most good, for the most people.”

A donor advised fund honors the late Wynne Chase (in a Patrick O’Connor portrait with her husband Arthur) by supporting services that empower homeless women to take charge of their lives.

“ This donor advised fund lets our children and me have a say in how we give back to our community. ”
– Arthur E. Chase

Donor Advised Funds (continued)

The Metzger Family Fund (2010)
Barrett and Mahroo Morgan Donor Advised Fund (2008)
John M. Nelson Fund (1990)
Pakachoag Church Fund for Human Understanding (1999)
Town of Petersham Fund (1984)
The Pyle Fund (1986)
Salois Family Fund (2010)
The SASA Fund (2011)
Charles E. Scott Community Fund (1997)
Stonewall Fund (2008)
Margaret and Gordon Torgersen Fund (2000)
Traina Family Youth Development Fund (1999)
The Tree Fund (2000)
Trust in Kids Fund (1987)
Amos E. and Ann Laura Wasgatt Fund (1997)
Courtney C. Wetzel Memorial Scholarship Fund (2012) New
Todd H. Wetzel Fund (1992)
Whittier Family Charitable Gift Fund (2007)
Sally and Bill Pettit support community resources such as Tower Hill Botanic Garden, which provides lively outreach programs, including Youth Gardening Day.

Sally and Bill Pettit created their designated fund to support programs that advance their abiding interests and values. Grantees include All Saints Church and Tower Hill Botanic Garden.

In December 2012, Sally and Bill celebrated their 66th wedding anniversary and enlarged their fund by $1.3 million, the proceeds from the sale of their cherished Cape Cod bungalow. Under an estate plan, the Pettits had transferred its deed to the Foundation while continuing to spend summers at the seaside home. The Pettits’ extraordinary planned gift transformed a beloved family retreat into a resource that will benefit their community in perpetuity.

Bill died on February 20, 2013, after a short illness. He and Sally spoke with us shortly before his death, happily reflecting on their lives together and their philanthropic legacy.

In 1996, when the couple started the designated fund, they dedicated most of its grants to scholarships. “We both graduated from private schools,” said Sally, “but we felt strongly about supporting educational opportunities for public school students.”

With the estate plan, said Bill, a retired business executive, “We avoided saddling our children with a hefty inheritance tax. We’re pleased that our house quadrupled in value. The Foundation will manage and use our gift well.”
When John Rauth retired as chairman of UniBank in 2001, his colleagues honored him by creating this fund, which is dedicated to the Whitinsville Social Library. John and his wife Gloria have cherished the library since childhood. John has been its chairman since 1983 and Gloria runs its twice-yearly book fair, which supports library programs for children.

“We were both born and raised in Whitinsville,” says John. “We like living here in our small town and we have lots of fond memories. One is our library. I’ve used it since I was old enough to read. I still borrow a couple of books a week.”

“Our library is a vital part of our community,” says Gloria. “Some years, when the town couldn’t fund it, all but two staff were laid off. My sister and I helped with the backroom work. Along with other volunteers, we kept the library open 10 hours a week.”

“The library receives an annual contribution from our fund,” says John, “and we plan to expand it. We set up a trust and after our family has passed on, it will enter the fund. The Foundation does an excellent job of managing our fund, which will support our library in perpetuity.”

The Whitinsville Social Library occupies an exquisite, century-old building of Milford granite designed by Boston architect Richard Clipston Sturgis in the Georgian Revival style.
Scholarship Funds

Alumni Scholarship Fund (2012) New
Wallace D. and Dorothy M. Andrews Scholarship Fund (2011)
Adolfo Arrastia Beacon of Light Scholarship Fund (2005)
Helen and Chuck Arsenault Memorial Scholarship Fund (2000)
Auburn Woman's Club Fund (2000)
AVID North Scholarship Fund (2004)
Dennis Elroy Barry Memorial Scholarship Fund (2005)
Belmont Street Community School Scholarship Fund (2000)
Loretta J. Belval Scholarship Fund (2002)
Bruce S. Bennett Fund for Community Journalism (2006)
Mary Ann Binkoski Scholarship Fund (2011)
Mary and John Buckley Memorial Educational Fund (1998)
The Edward Carrien Scholarship Fund (2010)
Carrick Foundation Scholarship (2000)
Charlton PTO Fund (1999)
Mary Connolly Memorial Scholarship Fund (1999)
Melvin S. Cutler Fund (1986)
December 3rd Scholarship Fund (1999)
Admiral and Mrs. Louis E. Denfeld Scholarship Fund (2007)
Santo J. and Ellen M. DiDonato Memorial Scholarship Fund (1999)
Steve Drawbridge Memorial Fund (2008)
Richard and Carol Dymek Scholarship Fund (2006)
East Brookfield Scholarship (2007)
Jeffrey S. Edinberg Memorial Scholarship Fund (2002)
Elm Park Community School Scholarship Fund (1987)
Emanuel's Empowerment Fund (2012) New
Fred and Leona Eppington Scholarship Fund (2007)
Mary R. Fedeli Memorial Scholarship Fund (2002)
Anita and Nathaniel A. Feingold Scholarship Fund (1994)
Norma and Saul F. Feingold Fund (1983)
Fitchburg Sportsmen's Club Scholarship Fund (2009)
Earl P. Fontaine Memorial Scholarship (2003)
Marilyn & Russell Fox Scholarship Fund for Non-traditional Students (2010)
Janet Fraser Scholarship Fund (1999)
John F. Freeland Memorial Fund (2005)
Friends of Rutland Heights Hospital Permanent Fund (1993)
Judge and Mrs. William Garbose Fund (1998)
Derek Gaudette Memorial Scholarship Fund (1995)
General Scholarship Fund (1990)
Matthew Gignac Memorial Scholarship Fund (1999)
Greg’s Grant Fund (1997)
The Grynsel Educational Scholarship Fund (2006)
Emil Haddad Jazz Scholarship Fund (2004)
Marty Hastings Memorial Scholarship (2010)
The Hedin Family Memorial Fund (2007)
Maureen Henrickson Memorial Scholarship Fund (2004)
Charles Hugo Community Service Award Fund (2007)
Debbie Anne Johnson Memorial Fund (1993)
Dominic and Mary Johnson Memorial Scholarship Fund (2000)
Santo J. and Ellen M. DiDonato Memorial Scholarship Fund (1999)
Mary Connolly Memorial Scholarship Fund (1999)
Melvin S. Cutler Fund (1986)
December 3rd Scholarship Fund (1999)
Admiral and Mrs. Louis E. Denfeld Scholarship Fund (2007)
Santo J. and Ellen M. DiDonato Memorial Scholarship Fund (1999)
Steve Drawbridge Memorial Fund (2008)
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The Hedin Family Memorial Fund (2007)
Maureen Henrickson Memorial Scholarship Fund (2004)
Charles Hugo Community Service Award Fund (2007)
Debbie Anne Johnson Memorial Fund (1993)
Dominic and Mary Johnson Memorial Scholarship Fund (2000)

Leicester High School Football Alumni Scholarship Fund

Vick Taylor and Norm Soucie, Leicester High School ’61, were co-captains of the Wolverines, a football team the Boston press dubbed “Iron Men” after their undefeated 1960 season. Applying the same drive and team spirit to supporting young players, Vick, Bob Carney ’62, Jim Connery ’62, Dennis Hennessy ’70, Buddy Berryman ’61 and fellow football alumni created the Leicester High School Football Alumni Association.

Now with 275 members, the club presents the school’s current football team with two coveted prizes each year: a Most Valuable Player Award and a scholarship to a college-bound player.

“The names of the athletes who win our scholarship and MVP award go on plaques at the school,” says Bob Carney. “We love football. We enjoy putting something back into a program that gave us so many memories and lots of fun.

“We raise money through an annual raffle and golf tournament. Younger alumni can keep our program going for generations to come. The Foundation selects the scholarship recipients, makes the awards and manages our fund. It’s perfect.”
Scholarship Funds (continued)

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<thead>
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<th>Scholarship Fund</th>
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<td>Bradford J. Kemp Scholarship Fund (2008)</td>
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<td>Leicester High School Football Alumni Scholarship Fund (2007)</td>
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<td>Leicester Samaritan Nursing Association Fund (1996)</td>
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<td>Mark MacPherson Lightbown Memorial Scholarship Fund (1980)</td>
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<td>Lincoln Village Scholarship Fund (2001)</td>
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<td>Lunenburg Opportunity Fund (1999)</td>
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<td>Daniel Stephen Lussier Athletic Scholarship (2010)</td>
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<td>L.W.V.O. Memorial Scholarship Fund (2010)</td>
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<td>Lieutenant James F. “Jay” Lyons, III Memorial Scholarship Fund (2001)</td>
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<td>Frances F. Mansfield Scholarship Fund (1996)</td>
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<td>Anthony E. Mickunas Memorial Scholarship Fund (1987)</td>
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<td>Michael Minty Memorial Scholarship Fund (1988)</td>
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<td>Patricia Proko Morris Memorial Scholarship Fund (2012)</td>
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<td>Anne Carey Murphy Memorial Scholarship Fund (2001)</td>
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<td>Arnold and Sylvia Nylund Scholarship Fund (2001)</td>
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<td>Richard W. Pierce Fund (1985)</td>
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<td>Barbara Marks Rothschild Arts and Education Scholarship Fund (2004)</td>
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<td>Ida and Murray Rotman Scholarship Fund (1985)</td>
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<td>Andrew Sala Memorial Scholarship Fund (1998)</td>
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<td>Doris Salzer Memorial Scholarship Fund (2012)</td>
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<td>Seven Hills Charter Public School Scholarship Fund (2011)</td>
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<td>Herbert D. Sherwin Memorial Scholarship Fund (2004)</td>
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<td>Claudia Simonian Scholarship Fund (2007)</td>
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<td>Arthur J. Smith and Dorothy G. Smith Scholarship Fund (2005)</td>
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<td>Steelman Expository Writing Scholarship Fund (1999)</td>
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<td>Swedish National Federation Fund (2001)</td>
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<td>Tahanto Regional High School Scholarship Fund (1997)</td>
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<td>Paul E. Tarkiainen Art Award Fund (1995)</td>
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<td>Kathleen Terry Memorial Scholarship Fund (2005)</td>
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<td>Robert Thomson Scholarship Fund (2009)</td>
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<td>Sumner B. Tilton Memorial Scholarship Fund (1985)</td>
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<td>Laurie C. Tinsley Scholarship Fund (2002)</td>
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<td>Tobin Family Fund (1999)</td>
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<td>Carmen Tobin Nursing Scholarship Fund (1995)</td>
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<td>Mark W. Tripp Scholarship (2011)</td>
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<td>Webster Square Business Association Scholarship Fund (2002)</td>
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<td>Leroy Weiner Scholarship Fund (2000)</td>
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<td>Paul J. Westberg Memorial Scholarship Fund (2000)</td>
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<td>Leonard H. White Scholarship Fund (2011)</td>
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<td>Mary Olive Wood Scholarship Fund (1992)</td>
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<td>Worcester Latino Coalition Scholarship Fund (1999)</td>
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<td>Worcester Swedish Charitable Association (2001)</td>
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<td>Worcester Woman's Club Fund (1999)</td>
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Santo J. and Ellen M. DiDonato Memorial Scholarship Fund

Lifelong Webster residents Santo and Ellen DiDonato believed in the value of education and their scholarship helps local students gain the life-changing experience of higher learning.

Santo and Ellen DiDonato were born and brought up in Webster, MA, and they raised their family in the town. Before his death in 1998, Santo made a planned gift to establish this fund, which annually awards four-year scholarships to two graduates of the secondary schools serving their hometown: Bartlett High School and Shepherd Hill Regional High School.

Nancy Healy speaks of her late parents and how they are fulfilling their dream of higher education.

“My parents were children of Italian immigrants. They both had seven siblings and they were pulled out of school to help support their families. My father left school in eighth grade. My mother’s education ended during her senior year of high school.

“My father built a very successful business as a construction contractor. But he and my mother always wished that they’d been able to finish school. They put both my brother and me through college with their life savings.

“With this scholarship, they are making a difference in the lives of other kids.”
Committee Advised Funds

Community Ministries Fund (2006)
Rosemary Davis Environmental Preservation Fund (2001)
Fairlawn Foundation Fund (1991)
Fallon/OrNda Community Health Fund (1996)
Friends of Learning in Killingly Fund (1998)
Mary B. Grogan Fund for Youth (2001)
Jeppson Memorial Fund for Brookfield (1976)
Leicester Savings Bank Fund (1997)
Organization Assistance Fund (1996)
Christopher J. Paskell Memorial Fund (2004)
The Practical Education Fund (2010)
Renaissance Award Fund (2004)
Worcester County Food Bank Fund to End Hunger (2011)
Youth for Community Improvement Endowment Fund (2001)

A decade ago, Dr. Arthur Pappas and his wife Martha created the Auburn Foundation, a fund dedicated to enriching life in their hometown, Auburn, MA.

While the fund’s principal grows, its interest generates about $16,000 each year for grants that vary in size from $500 to $5,000. Every spring, a committee representing a cross-section of the town reviews applications and selects grantees. The Foundation guides the process, manages the fund and distributes the grants.

Committee member Pat Bukoski, describing a variety of grants said, “We helped fund our senior center’s kitchen renovation and paid for supplies our Boy Scouts needed to paint the town’s fire hydrants. A grant to the Historical Society funded archival shelving for memorabilia dating back to the Civil War. We funded a bird-banding program for middle school children and a monthly church supper that brings the community together.

“When a church’s preschool program requested money for a defibrillator, the committee decided that the Auburn Foundation would purchase one for every public building in town.

“We give equal weight to proposals from large and small nonprofits. We look at how each will benefit our town.”

An Auburn Foundation grant funded digital recording equipment for Voices of Light, Auburn, a group of middle school students who select and record literary works and original compositions for Audio Journal, a nonprofit service for the blind.
Dix and Sarah Davis created this field of interest fund to make dentists’ services available to children whose families cannot afford dental care. By establishing this endowed fund, the couple can help generations of children gain better oral health.

“As a child, I never got to eat candy or drink soda,” says Sarah. “My grandfather, William Bailey Dunning and his brother, Henry Sage Dunning, were founders of the Columbia University College of Dental Medicine.

My uncle, Dr. James M. Dunning, was dean of the Harvard School of Dental Medicine and a leading advocate of school-based dental health programs and the use of fluorides in drinking water. We want to help children who would not otherwise have dental care.”

Dix, a member of the Foundation’s Investment Committee and a former board member, says, “The Foundation increases the impact of our fund by investing the principal so it grows, and by drawing from our own and like-minded funds as well as discretionary dollars to help programs that provide affordable dental care to children.”

Sarah B. and Dix F. Davis Fund

Dix and Sarah Davis dedicate their fund to making oral health care affordable for more children in Worcester County through agencies such as the Family Health Care Center of Worcester.
Sarah Garfield Berry regards volunteering and community leadership as responsibilities in life no less than work and family. A managing director for investments at Wells Fargo Advisors in Worcester, Sarah has also been president of Higgins Armory Museum, the Worcester Art Museum and the Foundation. She and her husband Allen consider their gift to endow a discretionary fund a smart way to invest in their community.

“The Foundation brings many players to the table, including grant applicants, board volunteers and committee members. We all learn about our region and its real needs conversing with others whose paths might not otherwise cross.

“The Garfield Berry Fund allows the Foundation to use its knowledge and discretionary grant dollars where they matter most. The Foundation efficiently manages and distributes funds. With its strength and size, it supports programs and needs determined through almost 40 years of service to the region.”

“The Garfield Berry Fund allows the Foundation to use its knowledge and discretionary grant dollars where they matter most.

– Sarah Garfield Berry
Agency Funds

Abby Kelley Foster House Fund (2008)
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Dynasty Fund - Knight (1997)
The Elm Park Center for Early Childhood Education Scholarship Fund (2006)
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Touchstone Community School Funds (2005)
United Way of Central Massachusetts Fund (1987)
Women's Initiative Fund in Honor of Lois B. Green (2009)
Worcester Area Association for the Education of Young Children Fund (1998)
Worcester County Poetry Association’s Funds (2000-10)
Worcester Jewish Community Center Fund (2010)
Youth Opportunities Upheld, Inc. Fund (1987)

Worcester County Poetry Association

Worcester County is the birthplace of several illustrious poets, including Stanley Kunitz (1905 – 2006) who served twice as United States poet laureate.

Securing a vibrant home for poetry in Central Massachusetts is the mission of the Worcester County Poetry Association. For more than 40 years, the all-volunteer nonprofit has hosted poetry readings and published a distinguished literary quarterly. The Association relies on the Foundation to manage its four endowed funds.

“We’ve created a huge and friendly Worcester poetry community and a receptive audience that inspires visiting poets to share emerging work, not just familiar poems. Our fund for “The Worcester Review” enables us to keep publishing one of the oldest independent literary journals in the country. And our Founders’ Fund, which provides our operating expenses, consolidates gifts that had been in various banks and mutual funds.

“In 2010, we created the Stanley Kunitz Award Fund and the Gregory Stockmal Reading Fund. Gregory and his wife Carol owned the childhood home of Stanley Kunitz on Woodford Street, now a literary landmark. They became close friends with the poet, and each year sent him pears from the tree he planted as a boy. Gregory died in 2008, and donations in his memory support an annual reading. The Foundation invests, protects and manages our funds. Instead of trying to manage this money ourselves, we put our energy into our literary programs.”

— Carle Johnson, past president, Worcester County Poetry Assoc.
Foundation board member Mónica Escobar Lowell regards the Acorn Society as a way to keep giving to her community long after she’s gone.

“Since the mid-90s, I’ve been involved with the Foundation, where people with different talents and backgrounds work together to improve the quality in life for all. In my will, I’ve designated a certain amount of money to the Foundation. I know that whatever I can leave, it will be invested in a good way. To me, that is peace of mind.

“Worcester has been very good to me. By investing in Worcester through the Foundation, I’m confident that I’ll leave a meaningful legacy. The Foundation will use my dollars well. It’s an extremely well run organization with solid stewardship and a long-standing record of making an enormous difference to the underserved in our community.”

— Mónica Escobar Lowell, Vice President of Community Relations UMass Memorial Health Care

You are invited to join the roster of Acorn Society members by naming the Foundation as a beneficiary of a gift worth $10,000 or more through your will or estate plan. Your planned gift may provide you with significant tax advantages. And as an Acorn Society member, you will be invited to special events and Insights Tours, which bring donors and service providers together to explore issues critical to our region.

We are deeply grateful to every member of the Acorn Society, including those who prefer to remain anonymous. Your legacy strengthens your community.
In 2012, the Foundation received over $3.5 million in gifts—$2.1 million to create new named funds, and $1.4 million contributed to existing funds. We list all of our contributors here, and extend our sincere gratitude.

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Foundation grantee Community Harvest Project engages volunteers like high school student Priscilla Sena, a team leader, in picking and cleaning fresh vegetables.
In 2012, more than $4.7 million, not including scholarship awards, was distributed to over 350 non-profits. Here is a complete listing of grantees, followed by the funding source.

15-40 Connection $12,500
Kirby Foundation Fund
James J. and Patricia A. Moynihan Donor Advised Fund
The Pyle Fund

A.P.P.L.E. Seed $1,650
Jeppson Memorial Fund for Brookfield

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Fallon/OrNda Community Health Fund
C. Jean and Myles McDonough Fund
Lillian S. Pratt Fund
SASA Fund

Access Community Action Agency $1,000
Newell and Betty Hale Fund

African Community Education Program $35,246
Barbara E. and William E. Christensen Fund
Norman L. and Dorothy A. Sharfman Fund

AIDS Project Worcester $10,325
Fallon/OrNda Community Health Fund
Worcester County Food Bank Fund to End Hunger

Al-Hamra Academy $2,275
Khazma A. Soffan Memorial Fund

All Saints Episcopal Church $4,200
Sarah Daniels Pettit and William O. Pettit Jr. Fund
Helen M. and Thomas B. Stinson Fund

American Antiquarian Society $18,100
Elkanah B. Atkinson Community and Education Fund
Bozenhard Charitable Fund
Jeanne Remillard Curtis Fund
Henry B. and Jane K. Dewey Fund
Gordon Iver and Dorothy Brewer Erikson Fund
Jeppson Memorial Fund
John M. Nelson Fund

American Cancer Society $600
Paul E. Cohan Fund
Candi Tiarks Cancer Research Fund

American Red Cross of Central Massachusetts $22,750
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Maureen Logan Coghlin Fund
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Discretionary Funds
Stonewall Fund

Arc of Quinebaug Valley $1,000
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ARTS Worcester $20,445
Fund for the Arts and Humanities
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Ashburnham Westminster Youth Hockey $100
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Audio Journal $1,500
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Bancroft School $55,302
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Blessed John Paul II Parish $1,500
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Bonita Springs Concert Band $150
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Boothbay Harbor Memorial Library $937
Raymond P. Harold Memorial Fund

Boothbay Railway Village $1,000
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Boothbay Region Land Trust $2,000
Raymond P. Harold Memorial Fund

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Central Massachusetts Area Health Education Center $35,000
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Quota International of Worcester Fund
SASA Fund

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Ruth and John Adam Fund
George I. Alden Education Fund
Elder Services of Worcester Area $11,525
Discretionary Funds
H. Arthur Smith Designated Fund
Harold Davis Woodbury Fund
Family Health Center of Worcester $78,202
Sarah B. and DIX F. Davis Fund
Eliza D. and Cora J. D. Dodge Fund
Fallon/OrNda Community Health Fund
Lund Pioneer Fund
Mini-Grants Fund
Family Services of Central Massachusetts $1,000
John M. Nelson Fund
Finnish American Reporter $2,123
Finnish American Social Club Fund
First Baptist Church of Leominster $3,000
Worcester County Food Bank Fund to End Hunger
First Baptist Church of Worcester $1,750
Trust in Kids Fund
First Congregational Church of Shrewsbury $1,388
Bozenhard Charitable Fund
Frances F. Mansfield Fund
Paul and Fay Rossley Fund
First Congregational Parish, Unitarian $2,016
First Congregational Parish, Unitarian Fund
First Night Worcester $8,000
Discretionary Funds
First Unitarian Church $24,952
Hollis E. and Gwendolyn D. Alden Fund
Henry B. and Jane K. Dewey Fund
Morgan B. and Loretta R. Dewey Fund
Martha L. and William P. Densmore Fund
First Unitarian Church Fund
Peter H. and Catherine H. Levine Fund
The Peter H. Levine and Catherine H. Levine Fund for the First Unitarian Church
Barrett and Mahroo Morgan Fund
Fisher House Foundation $2,000
Whittier Family Charitable Gift Fund
Fitchburg Art Museum $3,000
Olive I. and Anthony A. Borgatti Jr. Donor Advised Fund
Fitchburg Cultural Alliance $8,000
Joseph A. Tosoni Fund
Fort Ticonderoga
Elkanah B. Atkinson Community and Education Fund
Francis W. Parker Charter Essential School $6,000
Kirby Foundation Fund
Friendly House $27,500
Discretionary Funds
Eliza D. and Cora J. D. Dodge Fund
Pelletz Family Fund
Friends of the Brookfield Town Hall $2,000
Jeppson Memorial Fund for Brookfield
Friends of Gale Free Library $12,640
Friends of Gale Free Library 110th Endowment Fund
Friends of the Millbury Public Library $1,722
Mary B. Grogan Fund for Youth
Friends of Pappas Recreation Complex Corporation $4,000
The Auburn Foundation
Friends of Sutton Elders $250
David R. and Rosalie A. Grenon Fund
Friends of the Worcester Public Library $6,000
Discretionary Funds
Fruitlands Museum $1,065
Mini-Grants Fund
Gale Free Library $1,379
C. Bradford and Elizabeth C. Newell Fund
Gardner Visiting Nurse Association $2,704
Worcester County Food Bank Fund to End Hunger
Genesis Club $5,000
Fallon/OrNda Community Health Fund
Girl Scouts of Central and Western Massachusetts $949
Robert G. and Eliza C. Hess Fund
Girls Inc., of Worcester $23,049
Eliza D. and Cora J. D. Dodge Fund
Robert G. and Eliza C. Hess Fund
Mini-Grants Fund
Youth for Community Improvement Fund
Good Samaritan Mission Council $666
Good Samaritan Mission Council Fund
Good Shepherd Manor $100
Pelletz Family Fund
Goodspeed Musicals $500
Newell and Betty Hale Fund
Grafton Land Trust $440
Harris Family Fund
Grand Banks Schooner Museum Trust $500
Paul and Fay Rossley Fund
Greater Worcester 32° Masonic Learning Center for Children $2,488
Polly C. and Joseph R. Carter Fund
Greater Worcester Land Trust $8,407
The Dr. James J. Convery and Tracy A. Craig Fund
Discretionary Funds
Environmental Grantmaking Fund
Frances M. Herron Fund
The Pyle Fund
Growing Places Garden Project, Inc. $10,000
Discretionary Funds
Mini-Grants Fund
Guideposts Foundation $1,000
The Pyle Fund
Habitat for Humanity of Lee County $3,000
Hugh W. and Harriet K. Crawford Fund
Habitat for Humanity-MetroWest/Greater Worcester $16,900
Anonymous Fund
Discretionary Funds
Environmental Grantmaking Fund
Micah Housing Corporation Fund
Habitat for Humanity North Central Massachusetts $10,000
Discretionary Funds
Habitat for Humanity of Northeast Connecticut $500
Newell and Betty Hale Fund
Harvest Fair Committee $2,850
Leicester Savings Bank Fund
HealthEast Foundation $100
Paul E. Cohen Fund
Hearts for Heat, Leicester Chapter $6,243
Leicester Savings Bank Fund
Isaac Southgate Fund For Leicester
Heywood Hospital $30,000
Eliza D. and Cora J. D. Dodge Fund
Fairlawn Foundation Fund
John Woodman Higgins Armory Museum $4,503
Elkanah B. Atkinson Community and Education Fund
Ross and Lisa Dik Fund
Mary Louise Wilding-White Fund
Historic Deerfield
Elkanah B. Atkinson Community and Education Fund
Grants

Holy Name Central Catholic Junior/Senior High School $1,500
David R. and Rosalie A. Grenon Fund
Pelletz Family Fund

Home for Little Wanderers $2,000
Whittier Family Charitable Gift Fund

HOPE Coalition $12,500
Discretionary Funds

Horizons for Homeless Children $8,000
Eliza D. and Cora J. D. Dodge Fund

House of Peace and Education $17,000
Jane Bath Fund
Discretionary Funds

Household Goods Recycling of Massachusetts $7,000
Discretionary Funds

Interfaith Hospitality Network of Greater Worcester $10,000
Eliza D. and Cora J. D. Dodge Fund

Italian-American Cultural Center $755
Paul M. Pezzella Fund in Memory of Patsy and Theresa Pezzella

Jeremiah’s Hospice $3,000
The Pyle Fund
SASA Fund

Jericho Road Project $5,000
Worcester County Deputy Sheriffs Association Fund

Jewish Family Service of Worcester $9,500
Theodore and Marjorie M. Deitz Fund
Discretionary Funds

Jewish Federation of Central Massachusetts $3,000
Samuel Frank Charitable Fund
Pelletz Family Fund

Jewish Federation of Collier County $250
Pelletz Family Fund

Jewish Healthcare Center $2,750
Theodore and Marjorie M. Deitz Fund
Pelletz Family Fund

Joshua Hyde Public Library $1,114
Charles P. Ciaffone and Rose B. Ciaffone Fund

Joy of Music Program $25,159
Jeanne Remillard Curtis Fund
Discretionary Funds
Norma and Saul F. Feingold Joy of Music Fund
David R. and Rosalie A. Grenon Fund
Joy of Music Program Beveridge and Frances Webster Endowment Fund
Peter H. and Catherine H. Levine Fund

Mini-Grants Fund
Paul and Fay Rossley Fund
SASA Fund
Stonewall Fund

Judicial Watch $100
Bozenhard Charitable Fund

Junior Crusaders Youth Hockey $200
Christopher J. Paskell Memorial Fund

Keeping Auburn Warm $2,500
The Auburn Foundation

Killingly Central School $500
Friends of Learning in Killingly Fund

Killingly High School $700
Friends of Learning in Killingly Fund

Killingly Intermediate School $900
Friends of Learning in Killingly Fund

Killingly Memorial School $890
Friends of Learning in Killingly Fund

Lahey Clinic Foundation $500
Paul and Fay Rossley Fund

The Last Green Valley $1,000
Newell and Betty Hale Fund

Latino Education Institute $30,000
Ruth and John Adam Fund

Lee Memorial Health System Foundation $1,000
Hugh W. and Harriet K. Crawford Fund

Leicester Council on Aging $6,295
Leicester Savings Bank Fund
Mini-Grants Fund

Leicester Police Department $5,095
Leicester Savings Bank Fund

Leicester Public Library Capital Campaign $4,500
Leicester Savings Bank Fund

Leicester Summer Concert Series Committee $5,000
Leicester Savings Bank Fund

Leukemia & Lymphoma Society - MA Chapter $250
Morgan B. and Loretta R. Dewey Fund

Literacy Volunteers of Greater Worcester $22,395
Norman L. and Dorothy A. Sharfman Fund
H. Arthur Smith Fund

Lucky Horse Equine Rescue $5,000
Rosemary Davis Memorial Fund

LUK Crisis Center $5,400
Discretionary Funds

Lutheran Social Services of New England $34,000
Discretionary Funds
Eliza D. and Cora J. D. Dodge Fund
SASA Fund
Worcester County Food Bank Fund to End Hunger

MAB Community Services $1,000
Lois S. Feldman Fund

Maine Sea Coast Missionary Society $250
Gordon Iver and Dorothy Brewer Erickson Fund

Massachusetts Audubon Society $54,934
The Auburn Foundation
Rosemary Davis Memorial Fund
Densmore Community Fund
Environmental Grantmaking Fund
Max H. Kuhner and Eloise A. Kuhner Fund
Leicester Savings Bank Fund

Massachusetts Eye and Ear Infirmary $500
Gordon Iver and Dorothy Brewer Erickson Fund

Massachusetts General Hospital $11,500
Gordon Iver and Dorothy Brewer Erickson Fund
Newell and Betty Hale Fund

Massachusetts Historical Society
Elkanah B. Atkinson Community and Education Fund

Massachusetts Medical Society and Alliance Charitable Foundation $6,000
Trust in Kids Fund

Massachusetts Society for the Prevention of Cruelty to Children $8,000
Eliza D. and Cora J. D. Dodge Fund

Master Singers of Worcester $4,800
Discretionary Funds
Mini-Grants Fund

Matthew 25 $11,334
Eliza D. and Cora J. D. Dodge Fund
Howard J. and Dorothy R. McGuiness Fund

Merriam-Gilbert Public Library $1,200
Mini-Grants Fund

Millers River Watershed Council $4,000
Environmental Grantmaking Fund

Mohegan Council Boy Scouts of America $14,778
Polly C. and Joseph R. Carter Fund
Maureen Logan Coghlin Fund
Lorraine Crepeau Fund
Robert G. and Eliza C. Hess Fund
Grants

Montachusett Interfaith Hospitality Network
$15,000
Eliza D. and Cora J. D. Dodge Fund

Montachusett Veterans Outreach Center
$3,000
Worcester County Food Bank Fund to End Hunger

Morgan Memorial Goodwill Industries
$4,000
Whittier Family Charitable Gift Fund

Morris Animal Foundation
$500
Whittier Family Charitable Gift Fund

Mount Desert Island Hospital
$500
Gordon Iver and Dorothy Brewer Erikson Fund

Mount Grace Land Conservation Trust
$6,500
Greater Worcester Jaycees Fund

MSPCA
$5,000
Rosemary Davis Memorial Fund

Museum of Russian Icons
$4,500
Discretionary Funds

Music Worcester
$12,585
Jeppson Memorial Fund
Kirby Foundation Fund
Mini-Grants Fund
SASA Fund

Mustard Seed
$1,000
SASA Fund

Mystic Seaport
$3,000
Hugh W. and Harriet K. Crawford Fund

National Multiple Sclerosis Society
$100
Bozenhard Charitable Fund

National Parks Conservation Association
$500
Whittier Family Charitable Gift Fund

Nativity School of Worcester
$16,500
Jeanne Remillard Curtis Fund
Discretionary Funds
Whittier Family Charitable Gift Fund

NCH Healthcare Foundation
$250
Gordon Iver and Dorothy Brewer Erikson Fund

NEADS/Dogs for Deaf and Disabled Americans
$33,687
Rosemary Davis Memorial Fund
Densmore Community Fund
Discretionary Funds
Katharine Higgins Riley Fund

NEADY Cats
$2,500
Rosemary Davis Memorial Fund

New England Center for Homeless Veterans
$500
Whittier Family Charitable Gift Fund

New England Historic Genealogical Society
$250
Gordon Iver and Dorothy Brewer Erikson Fund

Norman Rockwell Museum
$25,000
John V. Frank Fund for Pomfret Area

North Brookfield Youth Center
$14,000
Discretionary Funds
Youth for Community Improvement Fund

North Cottage Program
$750
Marla Maykel Fund

North County Land Trust
$4,000
Environmental Grantmaking Fund

North Quabbin Citizen Advocacy
$8,000
Discretionary Funds

Northbridge Council on Aging
$5,000
Discretionary Funds

Notre Dame Academy
$525
Bozenhard Charitable Fund

Oak Hill Community Development Corporation
$30,000
Discretionary Funds
Worcester Credit Bureau Fund

Old Sturbridge Village
$210,500
Argitis Family Fund
Elkanah B. Atkinson Community and Education Fund
Robert W. Booth Fund in Memory of George F. Booth
John V. Frank Fund for Pomfret Area

Operation Outreach-USA
$3,600
Rosemary Davis Memorial Fund

Our Father’s House
$24,208
Fallon/OrNda Community Health Fund
Joseph A. Tosoni Fund
Worcester County Food Bank Fund to End Hunger

Oxford Ecumenical Council
$3,000
Worcester County Food Bank Fund to End Hunger

Pakachoag Music School of Greater Worcester
$5,000
Discretionary Funds

Pathways for Change
$15,500
Fallon/OrNda Community Health Fund
Worcester Credit Bureau Fund

Pearle L. Crawford Memorial Library
$9,687
Hugh W. and Harriet K. Crawford Endowment Fund for the Pearle L. Crawford Memorial Library

The YMCA of Central Massachusetts is using a grant to support its Kids on the Move program, which helps children adopt habits of healthy nutrition and exercise.
Grants

Refugee and Immigrant Assistance Center $13,331
Jiji’s Fund

Regional Environmental Council $20,500
Worcester County Food Bank Fund to End Hunger
Worcester Credit Bureau Fund

Rehabilitative Resources $7,500
Rosemary Davis Memorial Fund

Rise Above Foundation $5,000
Discretionary Funds

Rockdale Congregational Church UCC $394
Lawrence M. and Augusta L. Keeler Fund

Rockport Music $100
Paul E. Cohan Fund

Rockport Public Library Gift Fund $200
Paul E. Cohan Fund

Rodale Institute $500
Whittier Family Charitable Gift Fund

Rural Cemetery and Crematory $12,970
Elizabeth Trumbull Barton Fund

Saint John’s High School $1,000
Argitis Family Fund

St. Andrew Lutheran School $165
Edward W. Betke Scholarship Fund

St. Andrews Hospital $1,400
Raymond P. Harold Memorial Fund

St. Anne and St. Patrick Parish $3,000

St. Anne’s Church $2,000
Gene J. DeFeudis Fund

St. Bernadette School $2,500
Richard and Deanna Charves Fund

St. Jude Children’s Research Hospital $2,500
MacLean Family Fund

St. Peter’s Parish $3,000
Worcester County Food Bank Fund to End Hunger

Salem Community Corporation $100
Bozenhard Charitable Fund

Salisbury Singers $1,500
Discretionary Funds

Salvation Army $11,200
Samuel Frank Charitable Fund
The Pyle Fund
SASA Fund
Whittier Family Charitable Gift Fund

Sarasota Orchestra $200
Paul E. Cohan Fund

Save The Children Federation $1,000
Newell and Betty Hale Fund

Second Chance Animal Shelter $2,500
Rosemary Davis Memorial Fund

Senior Citizen Club of Leicester $2,250
Leicester Savings Bank Fund

Seven Hills Foundation $1,079
Polly C. and Joseph R. Carter Fund
Paul and Fay Rossley Fund

Shrewsbury Public Library $6,685
Olive I. and Anthony A. Borgatti Jr. Donor Advised Fund
Rosemary Davis Memorial Fund
Discretionary Funds

Society for the Preservation of New England Antiquities $400
Elkanah B. Atkinson Community and Education Fund
Newell and Betty Hale Fund

Solutions at Work $1,500
Herbert B. and Jayne Cohen Fund

South High Community School $12,000
Youth Opportunity Fund

South Worcester Neighborhood Improvement Corporation $2,110
South Worcester Neighborhood Center Growth Fund

Southeast Asian Coalition of Central Massachusetts $62,787
Discretionary Funds
Fallon/OrNda Community Health Fund
Norman L. and Dorothy A. Sharman Fund
Youth for Community Improvement Fund

Spanish American Center $6,000
Discretionary Funds

Stand for Children Leadership Center $7,500
Discretionary Funds

Starhawks Youth Hockey $100
Christopher J. Paskell Memorial Fund

Stone Soup Collective/Community Resource Center $1,000
SASA Fund

Straight Ahead Ministries $15,000
Fairman C. Cowan Fund

Temple Emanuel $370
Paul E. Cohan Fund

Temple Sinai $40,000
Temple Sinai Fund
Tenacity $9,000
Andrew N. Ahlfors and Helmi E. Ahlfors Fund

The 300 Committee $300
Paul and Fay Rossley Fund

Thompson Ecumenical Empowerment Group $2,000
Newell and Betty Hale Fund

Town of Auburn $461,583
The Auburn Foundation
Dr. Arthur and Dr. Martha Pappas Recreation Complex Fund

Trinity Lutheran Church $25,572
Jeppson Memorial Fund

Trustees of Reservations $1,300
Elkanah B. Atkinson Community and Education Fund
Whittier Family Charitable Gift Fund

Tufts University Cummings School of Veterinary Medicine $7,500
Rosemary Davis Memorial Fund

Twin Cities Community Development Corporation $12,500
Discretionary Funds

Twin City Youth Hockey Association $293
Christopher J. Paskell Memorial Fund

U.S. English Foundation $100
Bozenhard Charitable Fund

UMass Memorial Foundation $46,755
Hollis E. and Gwendolyn D. Alden Fund
Argitis Family Fund
Dr. and Mrs. Edward Budnitz Fund
Central Massachusetts Health Standards Fund
Morgan B. and Loretta R. Dewey Fund
Lawrence M. and Augusta L. Keeler Fund
Peter J. and Sophie Kosky Fund
Max H. and Eloise A. Kuhner Memorial Fund
The Peter H. Levine Fund
David J. Lionetti Fund
Sandy C. Marks Jr. Biomedical Education Fund
C. Bradford and Elizabeth C. Newell Fund
Lillian S. Pratt Fund
Paul and Fay Rossley Fund
H. Arthur Smith Designated Fund
Harold Davis Woodbury Fund

UMass Memorial Health Care $10,000
Fallon/OrNda Community Health Fund

United Neighbors of Fitchburg $4,000
Mini-Grants Fund
Worcester County Food Bank Fund to End Hunger

United Services $500
Newell and Betty Hale Fund

United Way Lee, Hendry & Glades $10,000
Hugh W. and Harriet K. Crawford Fund

University of Maine $250
Gordon Iver and Dorothy Brewer Erikson Fund

United Way of Central Massachusetts $165,001
Elkanah B. Atkinson Community and Education Fund
Jeanne Remillard Curtis Fund
Martha L. and William P. Denimore Fund
Henry B. and Jane K. Dewey Fund
Paris and Marion S. Fletcher Fund
David R. and Rosalie A. Grenon Fund
Francis A. and Jacquelyn H. Harrington Fund
Kirby Foundation Fund
Arthur J. Remillard Jr. Fund
Robert and Helen E. Stoddard Fund
United Way of Central Massachusetts Fund

University of Minnesota Foundation $2,123
Finnish American Social Club Fund

USO World Headquarters $500
Whittier Family Charitable Gift Fund

Uxbridge Free Public Library $3,000
Mini-Grants Fund

Valley Residents for Improvement $18,000
Marian B. Kubelus and Marian Zell Nesbit Memorial Fund

ValleyCAST $5,000
Discretionary Funds

Venerini Academy $2,000
Gene J. DeFeudis Fund

Veterans, Inc. $20,640
Lois Anne Memorial Fund
Children's Christmas Fund

Visitation House $1,000
Gertrude Alice Johnson Fund

VNA Care Network and Hospice $7,500
Central Massachusetts Health Standards Fund

VSA Arts of Massachusetts $5,000
Discretionary Funds

Wachusett Food Pantry $500
Donna R. C. and John E. Sansoucy Fund

Wachusett Greenways $500
Marla Maykel Fund

Walther Lutheran High School $166
Edward W. Bettker Scholarship Fund

WCUW $10,000
Discretionary Funds

Webster Education Foundation $7,000
Bradford J. Kemp Fund

WGBH Educational Foundation $2,000
Newell and Betty Hale Fund
Paul and Fay Rossley Fund

Whitinsville Social Library $1,456
Lawrence M. and Augusta L. Keeler Fund
The John and Gloria Rauth Library Fund

Wildlife Rehabilitators Association of Massachusetts $6,000
Rosemary Davis Memorial Fund

Windham County 4-H Foundation $6,000
Newell and Betty Hale Fund

Wing Memorial Hospital $100,000
Ernest Osterman Family Fund

Winson School $150
Frances M. Herron Fund

Worcester Academy $36,214
George S. and Tammy Butler Fund
Theodore and Marjorie M. Deitz Fund
Morgan B. and Loretta R. Dewey Fund
Gordon Iver and Dorothy Brewer Erikson Fund

David R. and Rosalie A. Grenon Fund
Chapin Riley Fund
Paul and Fay Rossley Fund

Worcester Animal Rescue League $699
The Dr. James J. Convery and Tracy A. Craig Fund

Worcester Animal Rescue League Fund

Worcester Anti-Foreclosure Team $2,500
Discretionary Funds

Worcester Area Association for the Education of Young Children $650
Worcester Area Association for the Education of Young Children Fund

Worcester Area Mission Society $6,000
Whittier Family Charitable Gift Fund

Worcester Art Museum $204,377
Bozenhard Charitable Fund
H. Paul and Sara B. Buckingham III Fund
The Douglas P. Butler Fund
Martha A. Cowan Fund
Theodore and Marjorie M. Deitz Fund
Henry B. and Jane K. Dewey Fund

David R. and Rosalie A. Grenon Fund
Honee A. Hess Partnership with Children Fund

Jeppson Memorial Fund
Kirby Foundation Fund
Barrett and Mahroo Morgan Donor Advised Fund

Barrett and Mahroo Morgan Fund
Grants

Worcester County Poetry Association $5,292
Worcester County Poetry Association Founders Fund
Worcester County Poetry Association's Stanley Kunitz Award
Worcester County Poetry Association's Worcester Review Fund

Worcester Education Collaborative $12,000
Discretionary Funds
Mini-Grants Fund

Worcester Foundation for Biomedical Research $2,791
Hollis E. and Gwendolyn D. Alden Fund
Theodore and Marjorie M. Deitz Fund
Frances F. Mansfield Fund

Worcester Historical Museum $117,557
Elkanah B. Atkinson Community and Education Fund
Robert W. Booth Fund for the Worcester Historical Museum
The Norma Feingold Worcester History Prize Fund
Worcester Historical Museum Fund
Worcester Historical Museum Robert W. Booth Fund for Salisbury Mansion

Worcester Interfaith $4,328
Mini-Grants Fund
Youth for Community Improvement Fund

Worcester Jewish Community Center $18,991
Worcester Jewish Community Center Fund

Worcester Junior Sharks Youth Hockey $534
John Carter “High Five” Youth Hockey Fund

Worcester Polytechnic Institute $2,500
Bozenhard Charitable Fund
John M. Nelson Fund

Worcester Public Library $527
Clarence S. Arms Family Fund

Worcester Public Schools $30,854
Marcia R. Katter Memorial Fund
Norman L. and Dorothy A. Sharfman Fund

Worcester Regional Research Bureau $2,702
Worcester Regional Research Bureau Fund

Worcester Regional Science & Engineering Fair $250
Worcester Engineering Society Fund

Worcester Roots Project $10,000
Worcester Credit Bureau Fund

Worcester State Foundation $81,926
Olive I. and Anthony A. Borgatti Jr. Donor Advised Fund
Fairlawn Foundation Fund
Lillian R. Goodman and Mary K. Alexander Fund for Nursing Education and Research

Worcester Technical High School $607
Saul A. Seder Fund

Worcester Youth Center $22,250
Ross and Lisa Dik Fund
Discretionary Funds
The Pyle Fund

Worcester Youth Orchestras $3,261
Jeppson Memorial Fund

World Vision $2,000
Whittier Family Charitable Gift Fund

Y.O.U., Inc. $72,285
Discretionary Funds
Dynamy Fund - 25th Reunion
Fallon/OrNda Community Health Fund
Mini-Grants Fund
The Practical Education Fund
Polly and Dick Traina Fund for Y.O.U., Inc.
Youth Opportunity Fund

YMCA of Central Massachusetts $34,079
Polly C. and Joseph R. Carter Fund
Ross and Lisa Dik Fund
Discretionary Funds
Fallon/OrNda Community Health Fund
Shepherd Knapp School Fund
Stonewall Fund
Trust in Kids Fund

YMCA of Greater Hartford $24,500
Newell and Betty Hale Fund

YouthNet $17,500
Discretionary Funds

YWCA of Central Massachusetts $61,850
Bozenhard Charitable Fund
Carolyn Knignt Dik Fund
Eliza D. and Cora J. D. Dodge Fund
Francis A. and Jacquelyn H. Harrington Human Services Fund
Marla Maykel Fund
The Metzger Family Fund
SASA Fund

Louise R. and John F. Reynders Fund
Marvin Richmond Fund
Chapin Riley Fund
Helen M. and Thomas B. Stinson Fund
Worcester Art Museum Booth Family Fund for Education and Outreach

Worcester Center for Crafts $457
Louise R. and John F. Reynders Fund

Worcester Center for the Performing Arts $1,000
Kirby Foundation Fund

Worcester Chamber Music Society $7,000
Olive I. and Anthony A. Borgatti Jr. Donor Advised Fund

Worcester Community Action Council $21,500
Discretionary Funds
Mini-Grants Fund
The Pyle Fund
SASA Fund

Worcester Community Housing Resources $21,000
Discretionary Funds
SASA Fund

Worcester Comprehensive Education & Care $3,000
Mini-Grants Fund

Worcester County Food Bank $5,835
Jeanne Remillard Curtis Fund
Marla Maykel Fund
Howard J. and Dorothy R. McGuiness Fund
The Pyle Fund
SASA Fund

Worcester County Horticultural Society $158,124
Elkanah B. Atkinson Community and Education Fund
H. Paul and Sara B. Buckingham III Fund
Polly C. and Joseph R. Carter Fund
Discretionary Funds
Marla Maykel Fund
Sarah Daniels Pettit and William O. Pettit Jr. Fund
Worcester Tree Initiative Fund

Worcester County Mechanics Association $23,550
Bozenhard Charitable Fund
Julie Chase Fuller Endowment Fund for Mechanics Hall
Paul and Fay Rossley Fund

Worcester County Poetry Association’s Stanley Kunitz Award
Worcester County Poetry Association’s Worcester Review Fund
Worcester Education Collaborative $12,000
Discretionary Funds
Mini-Grants Fund
Worcester Foundation for Biomedical Research $2,791
Hollis E. and Gwendolyn D. Alden Fund
Theodore and Marjorie M. Deitz Fund
Frances F. Mansfield Fund
Worcester Historical Museum $117,557
Elkanah B. Atkinson Community and Education Fund
Robert W. Booth Fund for the Worcester Historical Museum
The Norma Feingold Worcester History Prize Fund
Worcester Historical Museum Fund
Worcester Historical Museum Robert W. Booth Fund for Salisbury Mansion
Worcester Interfaith $4,328
Mini-Grants Fund
Youth for Community Improvement Fund
Worcester Jewish Community Center $18,991
Worcester Jewish Community Center Fund
Worcester Junior Sharks Youth Hockey $534
John Carter “High Five” Youth Hockey Fund
Worcester Polytechnic Institute $2,500
Bozenhard Charitable Fund
John M. Nelson Fund
Worcester Public Library $527
Clarence S. Arms Family Fund
Worcester Public Schools $30,854
Marcia R. Katter Memorial Fund
Norman L. and Dorothy A. Sharfman Fund
Worcester Regional Research Bureau $2,702
Worcester Regional Research Bureau Fund
Worcester Regional Science & Engineering Fair $250
Worcester Engineering Society Fund
Worcester Roots Project $10,000
Worcester Credit Bureau Fund
Worcester State Foundation $81,926
Olive I. and Anthony A. Borgatti Jr. Donor Advised Fund
Fairlawn Foundation Fund
Lillian R. Goodman and Mary K. Alexander Fund for Nursing Education and Research
Worcester Technical High School $607
Saul A. Seder Fund
Worcester Youth Center $22,250
Ross and Lisa Dik Fund
Discretionary Funds
The Pyle Fund
Worcester Youth Orchestras $3,261
Jeppson Memorial Fund
World Vision $2,000
Whittier Family Charitable Gift Fund
Y.O.U., Inc. $72,285
Discretionary Funds
Dynamy Fund - 25th Reunion
Fallon/OrNda Community Health Fund
Mini-Grants Fund
The Practical Education Fund
Polly and Dick Traina Fund for Y.O.U., Inc.
Youth Opportunity Fund
YMCA of Central Massachusetts $34,079
Polly C. and Joseph R. Carter Fund
Ross and Lisa Dik Fund
Discretionary Funds
Fallon/OrNda Community Health Fund
Shepherd Knapp School Fund
Stonewall Fund
Trust in Kids Fund
YMCA of Greater Hartford $24,500
Newell and Betty Hale Fund
YouthNet $17,500
Discretionary Funds
YWCA of Central Massachusetts $61,850
Bozenhard Charitable Fund
Carolyn Knignt Dik Fund
Eliza D. and Cora J. D. Dodge Fund
Francis A. and Jacquelyn H. Harrington Human Services Fund
Marla Maykel Fund
The Metzger Family Fund
SASA Fund
Financial Stewardship

Effective stewardship of assets is a cornerstone commitment.

A Diversified Portfolio
The goal of the Community Foundation’s investment program is to preserve and enhance the value of donor gifts and attempt to minimize risk. To accomplish this goal, we maintain a diversified portfolio with multiple managers engaged. Among our investments are high-yield bonds, international equities, and various sectors including emerging markets, flexible capital, global macros, and inflation hedging strategies.

Investment Committee
The Foundation’s Investment Committee is comprised of financial experts from the community that meets regularly to 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.

Investment Performance
The chart below shows annualized returns over the past decade.

The Foundation’s audited financial statements and independent auditor’s reports as of December 31, 2012 and 2011 were prepared by Alexander, Aronson, Finning & Co., PC, certified public accountants, and are available on request and online at www.greaterworcester.org.
## Financial Statements

### Years ended December 31, 2012 and 2011.

#### Statements of Financial Position

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$100,637</td>
<td>$446,529</td>
</tr>
<tr>
<td>Investments, including liquid capital</td>
<td>122,652,710</td>
<td>112,089,976</td>
</tr>
<tr>
<td>Split interest agreements</td>
<td>1,504,260</td>
<td>1,674,563</td>
</tr>
<tr>
<td>Property held for sale</td>
<td>-</td>
<td>1,307,129</td>
</tr>
<tr>
<td>Pledges receivable</td>
<td>305,000</td>
<td>305,000</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>61,433</td>
<td>80,605</td>
</tr>
<tr>
<td>Other assets</td>
<td>66,228</td>
<td>61,205</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$124,690,268</strong></td>
<td><strong>$115,965,007</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>LIABILITIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distributions payable</td>
<td>$169,900</td>
<td>$695,250</td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>78,154</td>
<td>74,095</td>
</tr>
<tr>
<td>Split interest obligations</td>
<td>947,004</td>
<td>966,039</td>
</tr>
<tr>
<td>Funds held as agency endowments</td>
<td>12,905,677</td>
<td>11,510,297</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>14,100,735</strong></td>
<td><strong>13,245,681</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted – operating reserves</td>
<td>1,098,800</td>
<td>981,732</td>
</tr>
<tr>
<td>Unrestricted – appreciation (depreciation) on permanently restricted net assets</td>
<td>(705,285)</td>
<td>(2,208,224)</td>
</tr>
<tr>
<td>Total unrestricted</td>
<td>393,515</td>
<td>(1,226,492)</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>28,332,785</td>
<td>23,827,785</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>81,863,233</td>
<td>80,118,033</td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>110,589,533</strong></td>
<td><strong>102,719,326</strong></td>
</tr>
</tbody>
</table>

| **TOTAL LIABILITIES AND NET ASSETS** | **$124,690,268** | **$115,965,007** |

#### Statements of Activities

<table>
<thead>
<tr>
<th>REVENUES</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment returns net of agency endowments</td>
<td>$10,959,959</td>
<td>$(2,235,806)</td>
</tr>
<tr>
<td>Contributions net of agency endowments</td>
<td>3,060,577</td>
<td>1,755,665</td>
</tr>
<tr>
<td>Change in value of split interest agreements</td>
<td>123,678</td>
<td>(213,170)</td>
</tr>
<tr>
<td>Change in value of remainder interest in real estate</td>
<td>-</td>
<td>150,872</td>
</tr>
<tr>
<td>Other revenue, gain on sale of property held for sale, net</td>
<td>30,262</td>
<td>-</td>
</tr>
<tr>
<td>Other support</td>
<td>70,490</td>
<td>79,749</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td><strong>14,244,966</strong></td>
<td><strong>(462,690)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distributions net of agency endowments</td>
<td>5,080,828</td>
<td>4,896,688</td>
</tr>
<tr>
<td>Operating expenses</td>
<td>1,293,931</td>
<td>1,298,478</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td><strong>6,374,759</strong></td>
<td><strong>6,195,166</strong></td>
</tr>
<tr>
<td>Changes in net assets</td>
<td>7,870,207</td>
<td>(6,657,856)</td>
</tr>
<tr>
<td><strong>NET ASSETS, beginning of year</strong></td>
<td>102,719,326</td>
<td>109,377,182</td>
</tr>
<tr>
<td><strong>NET ASSETS, end of year</strong></td>
<td><strong>$110,589,533</strong></td>
<td><strong>$102,719,326</strong></td>
</tr>
</tbody>
</table>
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Youth for Community Improvement provides high school students the opportunity to award community grants by developing their philanthropic and leadership skills during a 12-week program.
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Greater Worcester Community Foundation

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

Our Values
We appreciate and trust the people of our community to work together to solve problems, build prosperity, and bring vitality to the lives of others.

Our community is a unified body of individuals from a rich array of backgrounds who contribute in unique ways.

We are a professional, compassionate steward of our donors’ gifts, which have been permanently entrusted to us for the purpose of improving lives and conditions.
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