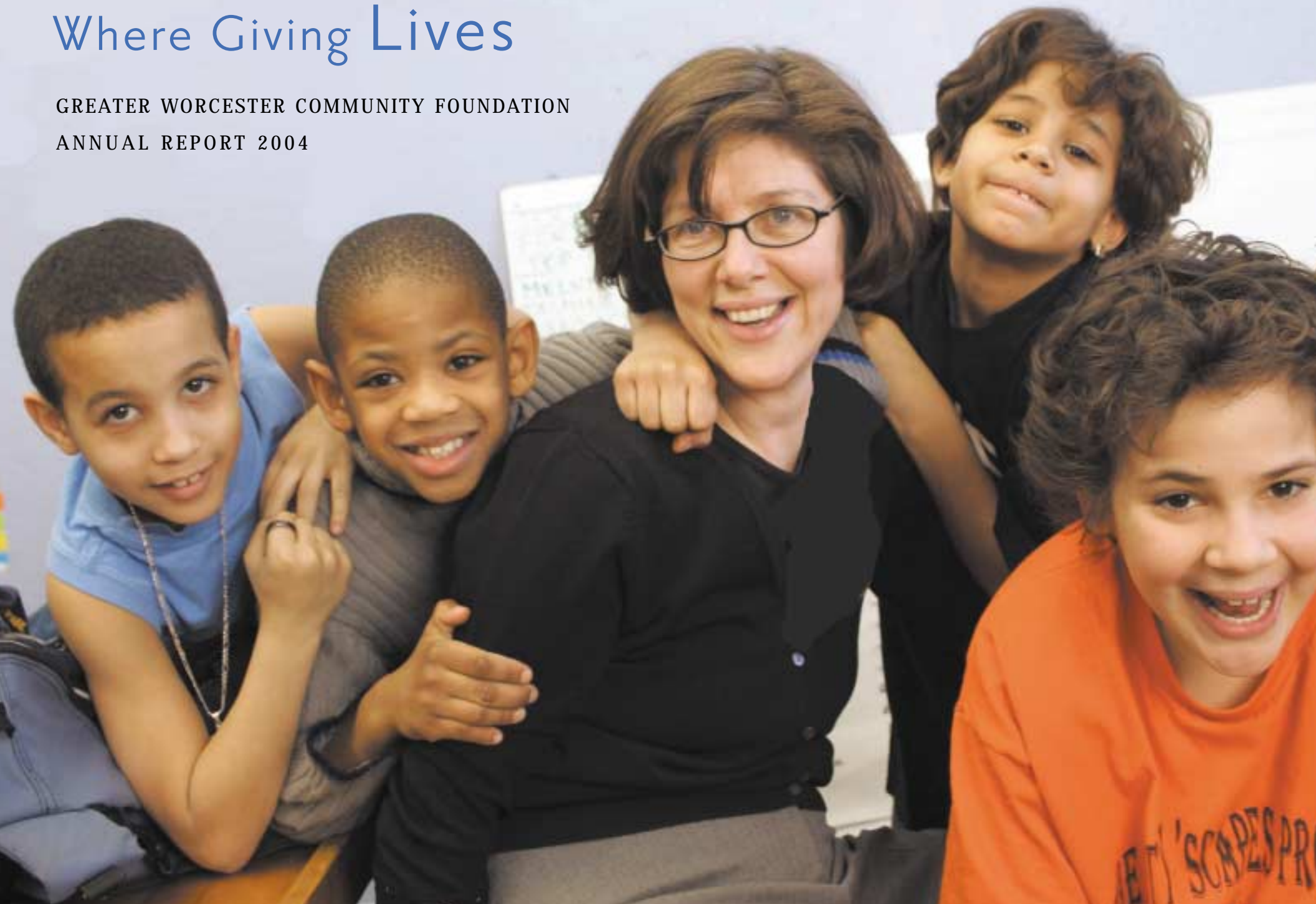


Where Giving Lives

GREATER WORCESTER COMMUNITY FOUNDATION
ANNUAL REPORT 2004



Mission Statement

Building on a national tradition of philanthropy, the Greater Worcester Community Foundation improves the quality of life in Central Massachusetts.

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Vision Statement

The Foundation is a unique community resource in its ability to attract funds, distribute grants and make loans. It will be a catalyst and leader among funders, agencies and individuals by addressing identified and emerging community needs.

The Greater Worcester Community Foundation will serve as a professional, compassionate steward of its donors' funds and will build on the creative vision of its founders. Recognizing its responsibility as a community resource, the Foundation will promote and encourage the value of philanthropy in those communities it serves.

Letter to the Community

During its first years, the Greater Worcester Community Foundation had a small endowment but a large vision: to develop an enduring organization that engages Worcester County in its own betterment.

As we've evolved and grown since 1975, we've remained faithful to the vision of our founders. The logo they chose, the acorn, is a reminder that a small kernel can grow into a large, sheltering and strong tree rooted deeply in its soil. We are grounded in Worcester County and its 60 towns and cities, a region with all of the challenges and resources of mid-sized urban centers and small communities.

The foresight of our founders has set us on a productive course: We've used the simple, accountable and flexible model of the community foundation—the fastest-growing philanthropic channel in the United States—to build an endowment that, as we close 2004, has reached \$100 million. These assets will enable us to do more together for our community.

As a community foundation, we annually distribute four and a half percent of our endowment value as grants and allocate one percent of endowment assets for operating expenses. The principal remains intact and grows over time to provide for the future.

In 2004, the Foundation distributed \$4.5 million in grants and scholarships and received \$5.7 million in gifts from an ever-larger community of donors.

We strengthen our communities through resources that include not only our financial assets but also the relationships we have developed over three decades with our donors and the nonprofit organizations that serve our region.

Our theme, "where giving lives," celebrates the resilience and vitality of these relationships as we work together to improve the quality of life in Greater Worcester, particularly for our most vulnerable residents.

 MICHAEL D. BROCKELMAN, *President*

 ANN T. LISI, *Executive Director*



President's Perspective:

Foundation Is Stronger and More Flexible As It Begins 30th Year

When I became president in June 2002, the stock market was in its third year of decline. Our operating revenue was tight that year because it is a function of the value of our assets. Yet we managed to present a balanced budget for 2003. We made cutbacks in staff and expenses and, since our lease was expiring, we negotiated a favorable lease at a new location while remaining in the central business district. We probably faced our toughest time financially during my first year on the job.

Over the past three years, we've adopted several policies that, added up together, help us operate even more effectively than we have in the past. For instance, we've

- established an audit committee that reviews our financial statements and advises the board on ways to improve our financial condition and reports
- formalized an annual evaluation procedure for the executive director
- established an in-depth orientation for new corporators and board members and
- activated a year-round nominating committee to evaluate positions and candidates.

I'm especially happy for an accomplishment that I had little if any hand in: as of December 31, 2004, the Foundation reached more than \$100 million in total assets. This is a major milestone in our development as a community foundation. The size of this endowment will provide us with the resources to accomplish more for our region.

I've enjoyed a hands-on role in our initiatives to make Worcester a more welcoming place for minorities. Soon after I became president, our Nonprofit Support Center started a series of discussions about the ethnic segmentation of our city and our hopes for a more inclusive community. Participants include CEOs and human resources managers of our largest companies and leaders of the African-American and Latino communities. Now, these discussions are extending to representatives of the city's growing Southeast Asian groups. Our meetings are yielding fresh ideas—and results.

With ever-expanding transportation options and population growth from towns to our east, Worcester is in some respects becoming a suburb of Boston. Our challenge is to retain our sense of community in an increasingly decentralized region.

At Bowditch & Dewey, our partnership criteria include making a visible contribution to the community. My relationship with the Foundation began when it came into being 30 years ago. My former partner and mentor Harry Dewey put together its legal structure. I served six years on the Distribution Committee and I was a board member for eight years. My three years as president have been very rewarding. I'm happy for what I was able to do. As we begin our 30th year, we're a stronger, more flexible organization that can adapt to changing times.



Michael D. Brockelman
*Chair of the board and president,
May 14, 2002 to May 17, 2005*

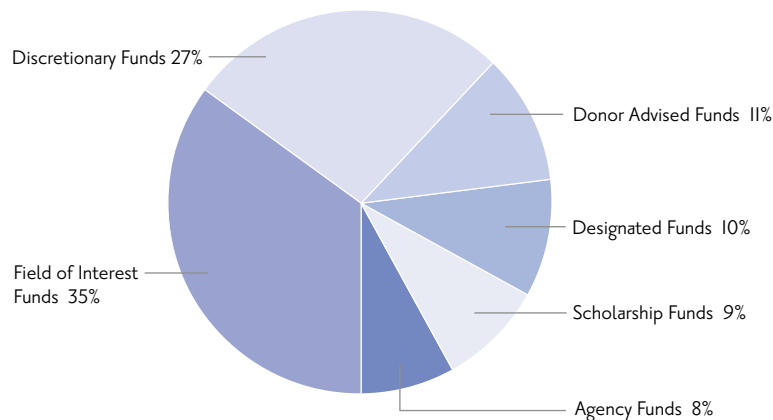


Foundation president Mike Brockelman worked closely with Carlton A. Watson and other community leaders to establish the African-American Network.

Year in Review

Financial Highlights as of and for the year ended December 31, 2004

Grantmaking Funds by Type



Total assets	\$103,277,292
Investment return	9.4%
Total gifts received (outright and deferred)	\$5,751,385
Dollar amount of grants approved	\$4,490,807

Major Accomplishments

Finances

- Reached \$100 million in assets as of December 31, 2004.
- Achieved five-year return of 3.4 percent (net of investment fees) on funds directed by Investment Committee.

Gifts

- Received more than \$5.7 million in gifts from living donors and bequests.
- Established 23 new funds worth a total of \$2,548,764.

Grants

- Awarded \$4.5 million in grants ranging in size from \$100 to \$250,000.
- Of the 593 grants approved in 2004,
 - Nearly 40 percent were awarded by the Distribution Committee from discretionary funds.
 - The balance was awarded by donor advisors or by groups involved in focused funds such as the Auburn Foundation, Friends of Learning in Killingly and Fairlawn Foundation.
 - Scholarship awards to 260 students totaled \$378,853.

Inclusion Initiative

- Fostered development of an African-American Network and human resources initiatives that engage underrepresented groups.

Donor Education

- For the second year, the Foundation conducted an Insights Tour, enabling donors, volunteers and other interested parties to visit key service providers and meet with their leaders. The 2004 Insights Tour focused on healthcare providers and agencies.

Nonprofit Support Center

- Led the formation of the New England Executive Transitions Network, now housed at Third Sector New England.
- Developed a new course for prospective executive directors.
- Launched a Leaders' Circle, which convenes new directors for coaching and support.
- Cited as a leading example in "The Expanding Universe: New Directions in Non-profit Capacity Building," a 2004 report of the Alliance for Nonprofit Management.

Operations

- Program staff conducted an in-depth review of selected grantee financials to enhance the evaluation of grants as part of an initiative to continuously improve processes.
- The annual appeal for operations received \$54,000 thanks to 100 percent participation from the Board of Directors and widespread support by corporators and other friends of the Foundation.
- The Board of Directors adopted a comprehensive ethics and accountability policy to document the Foundation's commitment to perform with the highest standards in financial management, gift stewardship and conduct.



Where Giving Lives

Giving is alive in the towns and cities of Greater Worcester. In homes, schools and workplaces, people are contributing their time, energy and talents as well as funds to make our region a better place.

When the City of Worcester incorporated in 1848, it was a booming commercial and transportation crossroads. The heart at the center of the city seal highlights Worcester's status as "the heart of the Commonwealth." Whether or not the city's founders intended it, their choice of a heart as a symbol for Worcester also suits a city whose business leaders were known for their philanthropy as well as their ingenuity.



The Greater Worcester Community Foundation extends this tradition of philanthropy to the entire community.

In 1975, a group of local citizens established the Foundation with the mission to increase and sustain philanthropy and build healthy, vibrant communities throughout our region. As its name implies, this foundation is run by the community and for the community. Our board and committees, including our grantmaking advisors, are local citizens. All are volunteers who know the community and its needs and organizations.

I N V E S T I N G ...

OAK HILL COMMUNITY DEVELOPMENT CORPORATION: RESIDENT-LED NEIGHBORHOOD REVIVAL

The Oak Hill Community Development Corporation (CDC) is reversing the decline of neighborhoods on Worcester's east side. A resident-run organization since 1972, Oak Hill CDC has helped to produce 180 units of housing through rehabilitation and new construction. These programs include conversion of the long-vacant Upsala Street School into 50 units of affordable housing for elders.

“Two decades ago, people were leaving the neighborhood. We've turned abandoned and neglected properties into quality, affordable residences for renters and first-time homebuyers. Properties are productive and generating taxes and more importantly, families are establishing homes and investing in their community. The neighborhoods are coming alive—again.

“Sustainable long-term change requires resident leadership and partnerships. The Foundation has been a significant contributor, supporting all of our lines of business, including our initiatives to develop resident leadership. The Foundation provides more than financial support: it is a partner in the renewal of Worcester's neighborhoods. As a well-known, influential organization, the Foundation has helped us develop our local and regional partnerships.”

JIM CRUICKSHANK, Director, Oak Hill Community Development Corporation

“The neighborhoods
are coming **alive**—again.”

As a community foundation, we are a tax-exempt public charity representing the thousands of individuals, families, businesses and nonprofit organizations in Greater Worcester that have built our \$100 million endowment and its more than 320 charitable funds. Over the past three decades, we have distributed grants and awards totaling more than \$45 million from this permanent, flexible endowment.

We work with community organizations and donors to improve the quality of life in Greater Worcester in measurable and sustainable ways. Some results may be immediate—such as a new trail system created by an open space committee. Other initiatives take decades, such as programs to restore blighted neighborhoods and reduce domestic violence.





● “The **scope** of our education and outreach would not be what it is today without the **consistent** and substantial backing of the Foundation....”

I N V E S T I N G ...

YWCA DAYBREAK PROGRAM: EXPANDING FROM INTERVENTION TO PREVENTION

Established in 1978 as a shelter for battered women and their children, the Daybreak program is today a comprehensive service system that addresses domestic violence at every juncture. Its services range from crisis intervention to preventive education for people of all ages, from preschool children to their grandparents.

“By the time families reach our shelter, they are traumatized from years of violence. Rebuilding their lives is a formidable task. The shelter provides concentrated individual and family support to stabilize families and help them ultimately move into permanent housing.

“Community outreach and education are the foundation of long-term change. Our nonresidential outreach services include court advocacy, counseling, support groups and a 24-hour hotline. Daybreak’s advocates speak Spanish, Vietnamese and English and they are cross-trained to provide in-depth services.

“We’ve brought a teen dating violence-prevention program and the nationally certified Child Assault Prevention program to the public schools. Our elementary and middle school programming includes a bullying curriculum. Through the Worcester Intervention Network (WIN), a collaborative program with the domestic violence unit of the Worcester Police Department, our advocates follow up with victims of all police-involved incidents in the city.

“The scope of our education and outreach would not be what it is today without the consistent and substantial backing of the Foundation, which provided our first opportunity to expand these nonresidential services. They encourage, support and challenge us.

“The Foundation’s relationships with other organizations and their affirmation of our programs have helped us become a resource for the entire community—including the schools, police and courts. Like the Foundation, we’re here for the long haul.”

GINGER NAVICKAS, Director, YWCA Daybreak program

As an organization dedicated to sustainable, long-term improvement, the Foundation operates simultaneously in the present, responding to immediate and urgent needs; in the past, connecting the community with its traditional strengths while adapting to changes of all kinds; and in the future, anticipating and preparing to meet emerging challenges.

Our constituents are the donors who have entrusted their funds to us in perpetuity; the dynamic, ever changing populations now living in our towns and cities; and the future generations whose quality of life will be influenced by the decisions we make today. These perspectives guide our mission, which we achieve by:

- Helping donors articulate and achieve their philanthropic, estate planning and tax objectives and engaging them in community priorities
- Investing in local nonprofits through grants and technical support
- Convening community leaders and organizations with shared goals to encourage and develop initiatives that meet current and emerging needs
- Safeguarding the assets in our trust and managing the endowment created by generations of donors.

C O N V E N I N G ...

WORCESTER COUNTY FOOD BANK

“The Nonprofit Support Center brings together the leaders of diverse organizations in an open, trusting atmosphere. We benefit from each other’s experience and learn over time, in collaboration with our colleagues.

“Its course in strategic fund development broadened my perspective from fund-raising to fund development, which is a process of building relationships and looking at the whole of our programs and operations. When all members of the organization do their jobs well, we present the strongest case to donors for grant and fund support.

“We now have a strategic fund development plan that the board approves along with our budget. We’re financially stable, our donor base is growing and we’re stronger in every sense: in our finances, programs and organizational performance. The community has confidence in us as good stewards of the resources given to us, including food, volunteers and money.

“The Nonprofit Support Center has helped us reach this point sooner. By availing myself of its professional development programs, I’ve become a better leader and executive director. When I became the director in 1995, I didn’t have a lot of management experience. The challenges facing an executive director can be overwhelming. Nonprofit Support Center programs provide me with processes and tools to manage these challenges and accomplish our goals.”

JEAN McMURRAY, Director, Worcester County Food Bank

“The community has
confidence in us
as good stewards
of the resources
given to us....”





C O N V E N I N G ...

SOUTHEAST ASIAN COALITION

The Southeast Asian Coalition of Central Massachusetts is a nonprofit organization serving the 8,700 Southeast Asians living in Worcester. It provides educational and job training as well as economic, social and cultural support.

“The Foundation was one of our first supporters, both with grants and organizational guidance. Foundation staff brought in a consultant who helped our founders make the transition into a formal organization with a clear mission and goals and an experienced board of directors.

“The Foundation brings together the leaders of organizations representing the growing communities of Worcester and introduces us to major employers and service providers. Our relationship with the Foundation has been wonderful. The whole spirit of it is about building community. I’m impressed with how hands-on and personally involved they are. They don’t wait for us to seek help. They come to us with resources that keep us moving ahead.”

TUYET TRAN, President of the board, Southeast Asian Coalition of Central Massachusetts
Director of adult rehabilitation services, Community Healthlink, Inc.

“The whole spirit of it is about building **community.**”

Our endowment commingles the funds and gifts of our donors. We use professionals to manage and invest these assets, which grow in value over time. The investment earnings provide a steady resource to support grants and other services to nonprofit organizations throughout Greater Worcester, primarily in the areas of neighborhood revitalization, educational achievement, arts and culture, workforce development, the environment, and the health and well being of children, youth, and families.

Just as an acorn takes decades to grow into a tree, some initiatives start small and progress over time. We nurture programs that may take decades to realize their full potential and impact.

We go beyond simply making grants: we also identify current and emerging issues, stimulate resources to address those needs and help our region prepare for the future.

As a catalyst of productive change, we lead by listening, facilitating, collaborating and bringing together resources—including people as well as funds. We develop not just our financial assets but also the philanthropic leadership within our region and we continually expand and diversify the talents and perspectives we bring to grantmaking.

Grantmaking

Priorities

The Foundation's mission is to strengthen the quality of life in Greater Worcester in measurable and sustainable ways. We build healthy and vibrant communities by addressing the full spectrum of topics rather than any single issue.

We provide funding and technical support to nonprofit organizations in the areas of health and human services, education, the environment, culture and the arts, civic affairs and community development.

The Distribution Committee convenes twice a year to evaluate agencies' proposals and award grants from the Foundation's discretionary and field-of-interest funds. In 2004, the committee distributed \$1.7 million, almost 40 percent of the \$4.5 million in grants awarded by the Foundation this year.

We invite interested applicants to contact the Foundation for grant guidelines.

“The integrity of the distribution process is of paramount importance to the committee. We carefully weigh each proposal in light of community priorities and the capabilities of the applicants. The committee is keenly aware of its responsibilities both to Foundation donors and to the community that relies on us to meet its most critical needs.”

PAMELA K. BOISVERT, Distribution Committee Chair and Foundation board member, Vice President, Colleges of Worcester Consortium

GRANTS PAID BY BROAD CATEGORIES IN 2004

	ARTS/ CULTURE	COMMUNITY DEVELOPMENT/ CIVIC AFFAIRS/ HOUSING/ RELIGION	EDUCATION	ENVIRONMENT/ NATURE	HEALTH / HUMAN SERVICES	TOTAL
Discretionary/Field of Interest	\$ 182,400	\$ 340,500	\$ 206,100	\$ 78,000	\$ 954,760	\$ 1,761,760
Designated/Agency	\$ 257,526	\$ 131,844	\$ 44,584	\$ 2,335	\$ 213,855	\$ 650,144
Scholarship	\$ 0	\$ 0	\$ 378,853	\$ 0	\$ 0	\$ 378,853
Advised	\$ 427,920	\$ 156,184	\$ 142,559	\$ 131,889	\$ 883,619	\$ 1,742,171
Total	\$ 867,846	\$ 628,528	\$ 772,096	\$ 212,224	\$ 2,052,234	\$ 4,532,928

Discretionary and Field of Interest Grants 2004

These grants were approved during 2004 from the Foundation's Discretionary Funds or, where listed in italics, from Field of Interest Funds.

Abby's House \$18,000 for emergency shelter services *Eliza D. and Cora J. D. Dodge Fund*

ACCION USA \$5,000 for small business lending in Worcester

Age Center of Worcester \$5,000 for a money management program *Francis A. and Jacquelyn H. Harrington Human Services Fund*

AIDS Project Worcester \$24,000 to serve women and their children *Eliza D. and Cora J. D. Dodge Fund*

AIDS Project Worcester \$20,000 for a peer support program *Worcester County Deputy Sheriffs Association Fund*

AIDS Project Worcester \$25,000 for counseling and testing services *Fallon OrNda Community Health Fund*

Alzheimer's Association, Massachusetts Chapter \$10,000 to operate the Worcester office

American Red Cross of Central Massachusetts \$8,000 scholarship aid for a Certified Nursing Assistant Home Health Care program

Anna Maria College \$10,000 for the Molly Bish Center for Public Service

Apple Tree Arts \$7,000 for music education at Head Start preschools

Armstrong Elementary School \$600 for LEARN, a support service for parents with limited English skills *Mini-Grant*

ArtsWorcester \$15,000 operating support *Fund for the Arts and Humanities*

ArtsWorcester \$1,000 for "Patterns of Worcester" exhibition *Mini-Grant*

Assabet Valley Mastersingers \$2,500 toward orchestra and soloist fees

Athol Area YMCA \$5,000 for a summer youth theatre program

Athol Bird and Nature Club \$10,000 for the Miller's River Environmental Center *Worcester Credit Bureau Fund*

Auburn Youth and Family Services \$9,000 for Auburn Comes Together (ACT) services for families *Eliza D. and Cora J. D. Dodge Fund*

Bancroft School \$5,000 for a summer program with Elm Park Community School *Shepherd Knapp School Fund*

Big Brothers/Big Sisters of Worcester County \$15,000 for a mentoring program in middle schools

Blackstone Valley Chamber of Commerce Education Foundation \$7,500 for a school-to-career and youth leadership program

Boys & Girls Club of Webster-Dudley \$13,500 a challenge grant for the Southbridge unit

Boys & Girls Club of Webster-Dudley \$8,000 for outreach and programs for teens

Boys & Girls Club of Worcester \$15,000 for a targeted outreach program

Bridge of Central Massachusetts \$12,000 for transitional services for G. Stanley Hall students

Bridge of Central Massachusetts \$12,000 for Safe Homes *Fallon OrNda Community Health Fund*

Bridge of Central Massachusetts \$3,000 for Safe Homes *Youth for Community Improvement*

Business Inclusion Council \$2,500 to re-launch the council *Mini-Grant*

Camp Fire USA, Central New England Council \$9,000 for a summer program *Marian B. Kubelus and Marian Zell Nesbit Memorial Fund*

Canal District Community Development Corporation \$15,000 operating support

Catholic Charities \$14,000 for immigration services

Center for Living and Working \$15,000 for a development officer *Worcester Credit Bureau Fund*

Center for Living and Working \$10,000 for a transportation coordinator *Fallon OrNda Community Health Fund*

Center for Women & Enterprise \$12,000 for the Worcester Community Entrepreneurs Program *Corinne Charron Turner Fund*

Central Massachusetts Area Health Education Center \$15,000 for the Outreach Worker Training Institute *Worcester Credit Bureau Fund*

Central Massachusetts Arts Assembly \$2,440 to purchase a soundboard *Mini-Grant*

Central Massachusetts Housing Alliance \$20,000 operating support

Central Massachusetts Land Trust Collaborative \$12,500 for a development coordinator *Worcester Credit Bureau Fund*

Central Massachusetts Partnership to Improve Care at the End of Life \$12,000 for a public awareness campaign *Central Massachusetts Health Standards Fund*

Central Massachusetts Regional Library System \$1,500 for a regional conference *Mini-Grant*

Centro Las Americas \$10,000 for the Institute of Latino Arts and Culture

Children's Friend \$17,500 for autism spectrum disorders *Eliza D. and Cora J. D. Dodge Fund*

Children's Friend \$19,000 for general mental health services *Fallon OrNda Community Health Fund*

Children's Friend \$3,000 for a teen mentoring program *Youth for Community Improvement*

City of Worcester Executive Office of Elder Affairs \$12,000 for wellness programs at the Senior Center

Commonwealth Education Project \$2,500 for a Worcester voter engagement project *Mini-Grant*

Clark University \$5,000 for neighborhood music instruction *Main South Fund*

Common Pathways \$15,000 for a research manager at United Way of Central Massachusetts

Community Builders \$20,000 for workforce development at Plumley Village *Olive I. and Anthony A. Borgatti, Jr. Fund*

Community Harvest Project \$13,000 for a volunteer coordinator at Brigham Hill Community Farm

Community Healthlink \$20,000 for job training for women at Sigourney House *Eliza D. and Cora J. D. Dodge Fund*

Community Healthlink \$20,000 for respite services for homeless adults *Fallon OrNda Community Health Fund*

Community Healthlink \$20,000 for Homelink serving chronically homeless adults *Francis A. and Jacquelyn H. Harrington Human Services Fund*

Court Appointed Special Advocates (CASA) Project \$15,000 operating support

Department of Social Services Kids Fund \$15,000 for Team Fresh Start for foster families *Eliza D. and Cora J. D. Dodge Fund*

Dismas House of Central Massachusetts \$12,000 operating support

Dismas House of Central Massachusetts \$5,000 for mental health counseling *Fallon OrNda Community Health Fund*

Doctor Franklin Perkins School \$5,000 for a therapeutic horseback riding program *Shepherd Knapp School Fund*

Dynamy \$12,000 for the Youth Academy *Sunmer Lee Sharfman Fund*

Easter Seals of Massachusetts \$8,000 for technology workshops for parents

EcoTarium \$15,000 for science education in Worcester Public Schools *Shepherd Knapp School Fund*

EcoTarium \$8,500 for Summer Discovery Camp *Fairman C. Cowan Fund*

Edward Street Child Services \$2,000 for staff training on African cultures *Mini-Grant*

EQUAL (East Quabbin Alliance) \$2,500 to increase citizen participation *Water and Land Stewardship Fund*

Family Health Center \$7,500 for Reach Out and Read *Eliza D. and Cora J. D. Dodge Fund*

Family Health Center \$20,000 for Albanian case managers *Saint Vincent Healthcare Fund*

Family Health Center \$20,000 for post-partum care *Fallon OrNda Community Health Fund*

Family Services of Central Massachusetts \$14,000 for the Worcester County Fathers and Family Network

First Night Worcester \$12,000 operating support

Friendly House \$18,000 for Frances Perkins Transitional Shelter *Elkanah B. Atkinson Community and Education Fund*

Friends of Newton Hill \$2,500 for a landscape management plan *Mini-Grant*

Genesis Club \$15,000 for education and job training

Girl Scouts of Montachusett Council \$9,000 for troop expansion *Marian B. Kubelus and Marian Zell Nesbit Memorial Fund*

Girls Incorporated of Worcester \$13,000 for transportation

Girls Incorporated of Worcester \$5,000 for health education *Fallon OrNda Community Health Fund*

Great Brook Valley Health Center \$18,000 to serve children with Attention Deficit Hyperactivity Disorder *Eliza D. and Cora J. D. Dodge Fund*

Great Brook Valley Health Center \$2,500 for a multi-language prescription ordering system *Mini-Grant*

Greater Gardner Community Development Corporation \$10,000 for youth programs and a homework center *Joseph A. Tosoni Fund*

Greater Worcester Habitat for Humanity \$10,000 operating support

Greater Worcester Interfaith Hospitality Network \$11,000 operating support

Greater Worcester Land Trust \$2,500 to map the city's open space parcels *Water and Land Stewardship Fund*

Habitat for Humanity of North Central Massachusetts \$15,000 operating support

Health Awareness Services of Central Massachusetts \$12,000 for a health educator at the Worcester Youth Center *Eliza D. and Cora J. D. Dodge Fund*



YOUTH FOR COMMUNITY IMPROVEMENT

Youth for Community Improvement (YCI) engages high-school students from diverse ethnic and economic backgrounds in grantmaking and leadership development. Like Distribution Committee members, YCI participants work together to evaluate and select grant proposals and review the outcomes. In 2004, YCI distributed \$15,000 to six nonprofit organizations.

“YCI is growing each year because it is a great program. It lets young people have their say. We get to see what’s going on in our city and help out. From reading grant proposals and visiting sites, I learned people don’t just have wants—they have needs. But we can’t fund every grant proposal. We have to make decisions. We learned how to work together and discuss rather than argue. At first, I didn’t like to speak out. Now I’m able to give my opinion. I plan to become an art therapist and help children show their feelings.”

NATASHA HOPKINS, Grade II, Burncoat High School

“This program has opened my eyes. At a shelter, we saw how many beds they need for the city’s homeless. I realized it’s important to get at causes of problems. We funded a program that teaches young mothers to talk with other girls about teen pregnancy. Another grant lets deaf kids enjoy music: they feel the vibrations of special drums. We donated money to a YWCA program that gives girls prom dresses and helps them do their hair and nails so they can have a fun night. I get to make a difference instead of just listening to the news.”

KITTY CORTES, Grade II, Doherty High School

“I get to make a difference
instead of just listening to the news.”

Health Awareness Services of Central Massachusetts \$15,000 for testing and counseling services for at-risk women
Fallon OrNda Community Health Fund

Health Law Advocates \$10,000 to pilot a mental health access program at Fitchburg juvenile court

Health Law Advocates \$5,000 for mental health services for youth
Fallon OrNda Community Health Fund

Henry Lee Willis Community Center \$9,000 for the Willis Center Cultural Institute

Henry Lee Willis Community Center \$1,000 for a fair housing forum
Mini-Grant

Higher Education Resource Center/Christ Tabernacle Church \$20,000 (two years) to support student achievement
Barbara E. and William E. Christensen Fund

HOPE Coalition \$13,500 for stipends for youth leaders

House of Peace and Education \$12,500 for job skills training
Joseph A. Tosoni Fund

Inclusion Group \$2,500 to develop a website diversity-jobs-worcester.com
Mini-Grant

Jewish Family Service of Worcester \$17,000 for child and family counseling
Eliza D. and Cora J. D. Dodge Fund

Jewish Family Service of Worcester \$18,000 for elder guardianship services
Francis A. and Jacquelyn H. Harrington Human Services Fund

Joy of Music Program \$10,000 scholarships for music students
Youth Opportunity Fund

Joy of Music Program \$2,300 to serve deaf and hard-of-hearing students
Youth for Community Improvement

Junior Achievement of Central Massachusetts \$10,000 for summer and after school programs

Legal Assistance Corporation of Central Massachusetts \$10,000 to address health issues
Bowditch & Dewey Fund

Legal Assistance Corporation of Central Massachusetts \$10,000 to address health issues
Fallon OrNda Community Health Fund

Listening, The Barre Integrated Health Center \$850 for a nutrition fair
Mini-Grant

Literacy Volunteers of Greater Worcester \$12,000 challenge grant to increase the donor base

Main South Community Development Corporation \$30,000 operating support

Major Taylor Association \$910 for a book signing event *Mini-Grant*

Martin Luther King, Jr. Business Empowerment Center \$10,000 for the Business Information Center

Massachusetts Audubon Society \$10,000 for Neighborhood Nature

Massachusetts Foundation for the Humanities \$7,500 for the Clemente Course in the Humanities *Robert S. and Helen A. Bowditch Fund*

Massachusetts Public Health Association \$500 for a health event *Mini-Grant*

Massachusetts Watershed Coalition \$5,000 to work with municipalities on watershed protection

Master Singers of Worcester \$2,500 operating support

Matthew 25 \$12,000 operating support

Milford Youth Center \$10,000 for an after school program

Montachusett Interfaith Hospitality Network \$10,000 operating support

Montachusett Opportunity Council \$12,000 for Wise Girls

Mount Wachusett Community College Foundation \$8,000 for a high school program on government *Joseph A. Tosoni Fund*

NeighborWorks HomeOwnership Center of Worcester \$15,000 operating support

North Brookfield Council on Aging \$5,000 for the Elder Outreach Program

North Brookfield Youth Center \$8,000 for an after school and summer program *Marian B. Kubelus and Marian Zell Nesbit Memorial Fund*

North Quabbin Citizen Advocacy \$8,000 for a mentoring program

North Quabbin Even Start \$15,000 for a family literacy and parenting program

Northbridge Mentoring Partnership \$6,000 operating support *Marian B. Kubelus and Marian Zell Nesbit Memorial Fund*

Oak Hill Community Development Corporation \$25,000 operating support

Old Sturbridge Village \$10,000 for a Craftsperson-in-Residence program *Worcester Credit Bureau Fund*

Old Sturbridge Village \$5,000 for a public program, Made in Massachusetts

Pakachoag Community Music School \$7,000 for programs in daycare settings *Child Wellness Fund*

Pernet Family Health Service \$20,000 for a home visiting program *Eliza D. and Cora J. D. Dodge Fund*

Pernet Family Health Service \$18,000 for a home visiting program *Fallon OrNda Community Health Fund*

Pleasant Street Neighborhood Network Center \$7,500 operating support

Pregnant and Parenting Teen Program/Oxford Public Schools \$15,000 operating support *Eliza D. and Cora J. D. Dodge Fund*

Preservation Worcester \$12,000 for public education and advocacy

Preservation Worcester \$700 to attend a national conference *Mini-Grant*

Rachel's Table \$8,000 operating support

Rainbow Child Development Center \$3,000 for classes at the Performing Arts School of Worcester *Youth for Community Improvement*

Regional Environmental Council \$18,000 operating support

Regional Environmental Council \$2,300 for youth involvement in urban gardens *Youth for Community Improvement*

Salisbury Singers \$3,000 operating support

Salisbury Singers \$2,500 for a strategic planning process *Mini-Grant*

Second Chance Animal Shelter \$2,500 for a placement training program *Mini-Grant*

South Middlesex Opportunity Council \$15,000 for a homeless women's case manager *Eliza D. and Cora J. D. Dodge Fund*

Southbridge Interfaith Hospitality Network \$8,000 operating support *Lois Anne Memorial Fund*

Southeast Asian Coalition of Central Massachusetts \$15,000 operating support *Francis A. and Jacquelyn H. Harrington Human Services Fund*

Southeast Asian Coalition of Central Massachusetts \$1,000 for a festival *Mini-Grant*

Sutton 300 \$2,500 for a public exhibit *Mini-Grant*

Thayer Symphony Orchestra \$6,000 for a partnership with public schools

Third Sector New England \$2,500 to establish nonprofit executive transition services *Mini-Grant*

Toxics Action Center \$2,500 for citizen groups in three towns *Water and Land Stewardship Fund*

Trust for Public Land, New England Regional Office \$20,000 to work with city officials to protect critical parcels

Twin Cities Community Development Corporation \$20,000 operating support

UMass Memorial Health Care \$20,000 for the Care Mobile *Sarah B. and Dix F. Davis Fund; Eliza D. and Cora J. D. Dodge Fund*

UMass Memorial Health Care \$18,000 for the Care Mobile *Fallon OrNda Community Health Fund*

UMass Memorial Health Care \$15,000 for neighborhood outreach

UMass Memorial Health Care \$10,000 for parent education *Eliza D. and Cora J. D. Dodge Fund*

Uniting Our Voices/Clark University \$6,000 for African-American parents to partner with high schools *Harriet Miller Hight Education Fund*

Valuing Our Children \$7,000 for a family leadership skills program in Athol

VSA arts of Massachusetts \$6,000 for Artist-in-Residency, professional development workshops and a festival

wART \$2,500 for stART on the Street *Fund for the Arts and Humanities*

Whitin Community Center \$9,000 for the Rockdale Youth Center and Saturday youth programs

Why Me, Inc. \$6,880 for the Childhood Cancer Lifeline *Cancer Care and Research Fund and H. Arthur Smith Fund*

WICN Public Radio \$10,000 to expand corporate support *Worcester Credit Bureau Fund*

Worcester Artists Group \$3,000 for public programs *Fund for the Arts and Humanities*

Worcester Center for Crafts \$15,000 for artists in classrooms *Shepherd Knapp School Fund*

Worcester Center for Crafts \$12,500 for CraftReach, an after school program

Worcester Community Action Council \$15,000 for the Community Mediation Center *Worcester Credit Bureau Fund*

Worcester Community Housing Resources \$40,000 (two years) operating support *Micah Housing Corporation Fund*

Worcester County Food Bank \$17,000 for A Fare Start job training program

Worcester County 4-H Center \$2,500 for the Buck Hill conservation area *Water and Land Stewardship Fund*

Worcester County Horticultural Society/Tower Hill Botanic Garden \$1,500 to document a photography collection *Mini-Grant*

Worcester Cultural Coalition \$20,000 program support *Partnership Fund*

Worcester East Side Community Development Corporation \$25,000 operating support *Providence & Worcester Railroad Company Fund*

Worcester Foothills Theatre \$17,000 for youth education and audience development

Worcester Fresh Air Fund \$9,000 for summer camp *Andrew N. Ahlfors and Helmi E. Ahlfors Fund*

Worcester Hip Hop Revolution \$1,500 for a youth event *Mini-Grant*

Worcester Institute on Loss & Trauma/YOU, Inc. \$2,000 for a clinicians' conference

Worcester Interfaith \$500 for a community gathering *Mini-Grant*

Worcester Jewish Community Center \$10,000 scholarship aid for families and seniors

Worcester Regional Research Bureau \$10,000 operating support

Worcester Regional Research Bureau \$10,000 for the Center for Performance Measurement *H. Arthur Smith Fund*

Worcester Roots Project \$1,000 for soil remediation kits *Water and Land Stewardship Fund*

Worcester State College \$14,000 for Upward Bound *Youth Opportunity Fund*

Worcester Women's History Project \$2,500 to move to the Worcester Historical Museum *Mini-Grant*

Worcester Youth Center \$20,000 for job training assistance *Anna S. and Warren G. Davis Fund*

YOU, Inc. \$10,000 for the Bruce Wells Scholars Program *Youth Opportunity Fund*

YMCA of Greater Worcester \$10,000 for Citizens Schools *Youth Opportunity Fund*

YMCA of Greater Worcester \$18,000 for a men's health initiative *Fallon OrNda Community Health Fund*

YMCA of Greater Worcester \$2,380 for the "Ultimate B-Ball Xperience" for 8th graders to value academics *Mini-Grant*

YouthNet \$15,000 operating support for a summer program *Greater Worcester Jaycees Fund*

YWCA of Central Massachusetts \$9,000 for respite child care services *Eliza D. and Cora J. D. Dodge Fund*

YWCA of Central Massachusetts /Daybreak Resources for Women and Children \$15,000 for direct services *Eliza D. and Cora J. D. Dodge Fund*

YWCA of Central Massachusetts /Daybreak Resources for Women and Children \$10,000 for community education and prevention

YWCA of Central Massachusetts \$1,400 for "Dream Come True" supplying formal wear for high school proms *Youth for Community Improvement*

Designated and Donor Advised Grants Approved in 2004

Some amounts have been omitted by donor request

Abby's House

Wynne L. Chase Fund \$5,000
Ethel S. Cunningham Fund \$4,605
Ann D. and Louis C. Iandoli Fund
The LaVigne Family Fund
C. Jean and Myles McDonough Fund \$864

ADVISE (Against Domestic Violence In Shrewsbury)

Olive I. and Anthony A. Borgatti, Jr. Fund \$500

Age Center of Worcester

William R. and Janet A. Carrick Fund \$1,000
H. Arthur Smith Fund \$3,452
Harold Davis Woodbury Fund \$1,018

AIDS Project Worcester

Children's Christmas Fund \$350

Al-Hamra Academy

Khazma A. Soffan Memorial Fund \$1,219

Albert Einstein College of Medicine

Herbert B. and Jayne Cohan Fund \$800

All Saints Episcopal Church

Sarah Daniels Pettit and William O. Pettit, Jr. Fund \$557
Helen M. and Thomas B. Stinson Fund \$218

American Antiquarian Society

Robert W. Booth Fund in Memory of George F. Booth \$200,000 (four-year payment)
Henry B. and Jane K. Dewey Fund \$1,250
Gordon Iver and Dorothy Brewer Erikson Fund \$500
Jeppson Memorial Fund \$13,508
John M. Nelson Fund \$1,000
Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation

“The Foundation is helping us to **transform** the Village with intergenerational learning initiatives.”

OLD STURBRIDGE VILLAGE: MAKING THE PAST NEW

The Wells families of Southbridge, founders of the American Optical Company, were also ardent collectors of early New England artifacts. They established Old Sturbridge Village to present their collection within a working village. From its opening on June 8, 1946, visitors saw craftspeople plying their trades in the Village's carefully transported and restored period buildings.

Today the largest outdoor history museum in the Northeast, Old Sturbridge Village is not just a nostalgic tableau or a step back in time. Instead, with help from the Foundation and other partners, the Village is engaging visitors in a dynamic encounter with the past.

A gift from the Foundation's H. Arthur Smith Fund supported development of Kidstory, a new, interactive learning gallery in the visitor center that opened on July 4th, 2004. The Foundation is also funding a new series of one-month residencies for accomplished local craftspeople who will demonstrate and teach crafts of the period.

“The Village shows daily life in a typical New England town during a critical 50-year period, from 1790 to 1840, when democracy was taking shape and the Industrial Revolution was about to change their world. This period can give us insights into the transitions of our own time. Kidstory lets families learn together. It is the first of five planned galleries that will turn our visitor center into a History Gateway for learners of all ages, not just school groups.

“These are all steps toward larger ideas. The Foundation is helping us to transform the Village with intergenerational learning initiatives. We want to strengthen local partnerships so more people use the Village as a resource. The Foundation accelerates and encourages such partnerships. It is exceptional not only in its sensitive grant giving, but also in its leadership in nonprofit management and power as a convener. Its 2004 mentorship program for emerging leaders of nonprofits brought together a lot of people who help and learn from each other.”

BEVERLY SHEPPARD, Chief Executive Officer, Old Sturbridge Village



American Heart Association
Herbert B. and Jayne Cohan Fund \$1,000

American Jewish Committee
Herbert B. and Jayne Cohan Fund \$200

American Red Cross of Central Massachusetts
David R. and Rosalie A. Grenon Fund \$1,000
Lionel M. and Cynthia E. Lamoureux Fund \$500
Fairlawn Foundation \$50,000

American Textile History Museum
Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation

Andover Newton Theological School
Trust in Kids Fund \$1,000

Anna Maria College
Maureen Logan Coghlin Fund
The LaVigne Family Fund

A.P.P.L.E. Seed
Jeppson Memorial Fund for Brookfield \$800

ARC of Quinebaug Valley Inc.
Newell and Betty Hale Fund \$2,000

Assumption College
James J. and Patricia A. Moynihan Fund \$25,000

Athol Area YMCA
Winifred Meany Killay and Matthew Meany Memorial Fund \$600

Auburn Birdbanding Research Team
The Auburn Foundation \$728

Auburn District Nursing Association
The Auburn Foundation \$2,500

Auburn Woman's Club Beautification Fund
The Auburn Foundation \$768

Auburn Youth and Family Services
The Auburn Foundation \$3,860

Auburn Cub Scout Pack 53
The Auburn Foundation \$1,500

Auburn Friends of the Senior Citizens Association
The Auburn Foundation \$1,800

Bancroft School
Jeppson Memorial Fund \$20,164
John M. Nelson Fund \$2,000
Paul and Fay Rossley Fund \$100

Bar Harbor Historical Society
Gordon Iver and Dorothy Brewer Erikson Fund \$200

Barton Center for Diabetes Education
David R. and Rosalie A. Grenon Fund \$500
The LaVigne Family Fund
Leicester Savings Bank Fund \$1,500

Becker College
The LaVigne Family Fund
Fairlawn Foundation \$8,000

Boothbay Harbor Memorial Library
Raymond P. Harold Memorial Fund \$621

Boothbay Railway Village
Paul and Fay Rossley Fund \$1,000

Boothbay Region Land Trust
Raymond P. Harold Memorial Fund \$621

Boothbay Region YMCA
Raymond P. Harold Memorial Fund \$2,483

Bosler Humane Society
Bosler Humane Society Fund \$2,135
Rosemary Davis Memorial Fund \$4,000
Paul and Fay Rossley Fund \$200

Boston Athenaeum
Elkanah B. Atkinson Community and Education Fund

Boston College
Herbert B. and Jayne Cohan Fund \$200

Boston Neurological Foundation
Amos E. and Ann Laura Wasgatt Fund \$1,000

Boston Poultry Exhibition
John P. Castagnetti Memorial Fund \$200

Boys & Girls Club of Worcester
Robert W. Booth Fund in Memory of George F. Booth \$200,000 (five-year payment)
Polly C. and Joseph R. Carter Fund \$500
Jeanne Remillard Curtis Fund \$500
David R. and Rosalie A. Grenon Fund \$500
Robert G. and Eliza C. Hess Fund \$1,053
Peter J. and Sophie Kosky Fund \$707
The LaVigne Family Fund

Sonia Werblin Masterman Fund \$1,700
Marla Maykel Fund \$2,000

Brigham and Women's Hospital
Glenda and Arthur Wolpert Fund \$1,000

Brookfield Cemetery Commission
Jeppson Memorial Fund for Brookfield \$1,650

Brookfield Congregational Church
Jeppson Memorial Fund for Brookfield \$1,050

Brookfield Elementary School
Jeppson Memorial Fund for Brookfield \$1,100

Brookfield Senior Citizens Club
Jeppson Memorial Fund for Brookfield \$150

Brookfield Unitarian Universalist Church
Chesson Family Fund \$720

Camp Fire USA, Central New England Council
Dana L. DeAngelis-McDonald Memorial Fund \$175

CASA Project
William R. and Janet A. Carrick Fund \$400

Center for Eye Research
Marla Maykel Fund \$2,000

Center for Women & Enterprise Central Massachusetts
Wynne L. Chase Fund \$2,000

Central Massachusetts Partnership to Improve Care at the End of Life
Fairlawn Foundation \$114,836

Children's Friend

Olive I. and Anthony A. Borgatti, Jr. Fund \$500
David R. and Rosalie A. Grenon Fund \$250
Paul J. and Dorothy B. Kervick Fund \$556
Louise R. and John F. Reynders Fund \$372

City of Worcester Young Woman of Consequence Award

Konstantina B. Lukes Fund \$500

Clark University

Nancy and Michael Leavitt Fund \$2,500
John W. Lund Fund \$6,670
Paul and Fay Rossley Fund \$3,000

College of the Atlantic

Gordon Iver and Dorothy Brewer Erikson Fund \$1,500

Community Healthlink

Children's Christmas Fund \$350
Carolyn Knight Dik Fund \$100
Frances F. Mansfield Fund \$1,079

Congregation for Humanistic Judaism

Paul E. Cohan Fund \$100

Cystic Fibrosis Foundation

Paul and Fay Rossley Fund \$500

Cystic Fibrosis Research

Paul and Fay Rossley Fund \$200

Dana Hall School

Hollis E. and Gwendolyn D. Alden Fund \$895

Day Kimball Hospital

Newell and Betty Hale Fund \$6,500

Department of Social Services Kids Fund

WTAG Christmas for Children Fund \$25,000

Diocese of Worcester

Ann D. and Louis C. Iandoli Fund
Paul J. and Dorothy B. Kervick Fund \$556
The LaVigne Family Fund

Douglas Historical Society

Douglas Historical Society Fund \$1,000

Easter Seals of Massachusetts

Hollis E. and Gwendolyn D. Alden Fund \$895
David R. and Rosalie A. Grenon Fund \$1,000
Charles E. Soule Paul Revere Insurance Group Centennial Fund \$2,400

EcoTarium

Olive I. and Anthony A. Borgatti Jr. Fund \$500
Rosemary Davis Memorial Fund \$13,600
David R. and Rosalie A. Grenon Fund \$500
Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation

Elmwood Street Elementary School

Mary B. Grogan Fund for Youth \$450

Faith Baptist Church

The Auburn Foundation \$2,500

Finnish American Reporter

Finnish American Social Club Fund \$2,344

Finnish Center at Saima Park

Finnish Heritage Foundation Fund \$500

Finnish Heritage Society, Sovittaja

Finnish Heritage Foundation Fund \$500

First Church in Sterling

Elkanah B. Atkinson Community and Education Fund

First Congregational Church of Shrewsbury

Frances F. Mansfield Fund \$1,079

First Congregational Church, UCC

Paul and Fay Rossley Fund \$500

First Congregational Parish, Unitarian

Town of Petersham Fund \$9,000

First Friends Early Care & Educational Center

Glenda and Arthur Wolpert Fund \$2,500

First Night Worcester

Olive I. and Anthony A. Borgatti Jr. Fund \$1,000

First Unitarian Church

Hollis E. and Gwendolyn D. Alden Fund \$895

Henry B. and Jane K. Dewey Fund \$1,500

John M. Nelson Fund \$38,000

Florida West Coast Symphony

Paul E. Cohan Fund \$100

Friends of the Leicester Public Library

Leicester Savings Bank Fund \$1,500

Francis Ouimet Scholarship Fund

Amos E. and Ann Laura Wasgatt Fund \$1,000

Frenchman's Creek Charities Foundation

Herbert B. and Jayne Cohan Fund \$900

Friendly House

Jeanne Remillard Curtis Fund \$1,000

Friends of the Rogers-Kennedy Memorial

Robert W. Booth Fund in Memory of George F. Booth \$25,000
Frances M. Herron Fund \$500

Friends of Sutton Elders

David R. and Rosalie A. Grenon Fund \$250

Friends of the Millbury Seniors

David R. and Rosalie A. Grenon Fund \$250

Friends of Worcester's Senior Center

Robert C. Maher Senior Center Fund \$5,650

Gale Free Library

C. Bradford and Elizabeth C. Newell Fund \$1,348



“Our grants benefit a whole cross section of the town.

My husband and I are **happy** to know that such support

will continue in perpetuity.”

THE AUBURN FOUNDATION: CASTING A WIDE NET ACROSS A SMALL TOWN

“My husband Arthur and I co-founded the Auburn Foundation to enrich the cultural and civic life of our hometown, Auburn, where we got our start and our values.

“Our grants are wide-ranging, from funding the Cub Scouts’ Adopt-a-Fire-Hydrant project to supporting a pilot program of Auburn Youth and Family Services to mentor families. A recent grant funded the renovation of the Auburn senior center’s kitchen, which serves thousands of meals in the course of a year.

“In spring and fall, students from Auburn Middle School join their science teachers and other volunteers to band about 1,000 migrating songbirds. A grant provides the group with the nets they use to catch the birds.

“We invite Auburn groups of all kinds to submit their requests. This breadth of projects really satisfies us. Our grants benefit a whole cross section of the town. My husband and I are happy to know that such support will continue in perpetuity.”

MARTHA PAPPAS, co-founder, Auburn Foundation Member, Foundation board of directors and Distribution Committee

Girl Scouts of Montachusett Council
Robert G. and Eliza C. Hess Fund \$1,054
Glenda and Arthur Wolpert Fund \$1,000

Girls Incorporated of Worcester
Robert G. and Eliza C. Hess Fund \$1,053

Grafton/Wachusett Lakers Youth Hockey
Christopher J. Paskell Memorial Fund \$450

Grand Banks Schooner Museum Trust
Paul and Fay Rossley Fund \$500

Greater Worcester 32° Masonic Learning Center for Children
Polly C. and Joseph R. Carter Fund \$2,500
The LaVigne Family Fund

Greater Worcester Community Foundation
Discretionary Funds \$40,000

Greater Worcester Community Foundation Directors and Corporators Fund
Paul and Fay Rossley Fund \$500

Greater Worcester Community Foundation Emil Haddad Jazz Scholarship Fund
Ann D. and Louis C. Iandoli Fund

Greater Worcester Community Foundation Norman L. and Dorothy A. Sharfman Fund
Jeanne Remillard Curtis Fund \$1,000

Greater Worcester Community Foundation WTAG Christmas for Children Fund
Dana L. DeAngelis-McDonald Memorial Fund \$121
Paul and Fay Rossley Fund \$300

Harvard Law School Fund
Elkanah B. Atkinson Community and Education Fund

Harvard University Medical School
Lawrence M. and Augusta L. Keeler Fund \$402

Health Law Advocates
Jiji’s Fund \$2,000

Henry Lee Willis Community Center
Jeanne Remillard Curtis Fund \$1,000

John Woodman Higgins Armory Museum
Mary Louise Wilding-White Fund \$4,097

Hillel House
Glenda and Arthur Wolpert Fund \$1,800

Hillside Restoration Project
Harris Family Fund \$417

Hillside School
Polly C. and Joseph R. Carter Fund \$1,500
H. Arthur Smith Fund \$6,902

Hobart College
Newell and Betty Hale Fund \$1,500

Holy Name Central Catholic Junior/Senior High School
David R. and Rosalie A. Grenon Fund \$500

Hyde School
Ross and Lisa Dik Fund \$400

Immigration History Research Center
Finnish American Social Club Fund \$2,344

Israel Children's Centers
Paul E. Cohan Fund \$300

Italian-American Cultural Center
Paul M. Pezzella Fund in Memory of
Patsy and Theresa Pezzella \$736

Jeremiah's Hospice
Jeanne Remillard Curtis Fund \$1,000

Jewish Federation of the Berkshires
Herbert B. and Jayne Cohan Fund \$200

**Jewish Federation of Central
Massachusetts**
Theodore and Marjorie M. Deitz Fund
\$1,360

**Jewish Federation of Palm Beach
County**
Herbert B. and Jayne Cohan Fund \$3,000

Jewish National Fund
Herbert B. and Jayne Cohan Fund \$300

Joy of Music Program
Jeanne Remillard Curtis Fund \$1,000
David R. and Rosalie A. Grenon Fund
\$1,000
Paul and Fay Rossley Fund \$1,000

Jupiter Medical Center Foundation
The LaVigne Family Fund

Kids Cafe of Worcester
Quota International of Worcester Fund
\$250

Killingly High School
Friends of Learning in Killingly Fund
\$822

Killingly Intermediate School
Friends of Learning in Killingly Fund
\$932

Lahey Clinic
Paul and Fay Rossley Fund \$300

**Leicester Food Pantry/St. Joseph and St.
Pius X Parishes**
Leicester Savings Bank Fund \$2,500

Leicester Friends of the Elders
Leicester Savings Bank Fund \$1,500

Leicester Girls Softball League
Leicester Savings Bank Fund \$1,200

Leicester Harvest Fair Committee
Leicester Savings Bank Fund \$1,400

**Leicester High School Athletic Booster
Club**
Leicester Savings Bank Fund \$20,000

Leicester Lion's Club
Leicester Savings Bank Fund \$7,500
Paul and Fay Rossley Fund \$1,000

Leicester Little League
Leicester Savings Bank Fund \$1,200

Leicester Primary School Volunteers
Leicester Savings Bank Fund \$1,500

Leicester Public Library
Leicester Savings Bank Fund \$5,000

Leicester School Council
Leicester Savings Bank Fund \$1,500

Leicester Snowmobile Club
Leicester Savings Bank Fund \$273

**Leicester Summer Concert Series
Committee**
Leicester Savings Bank Fund \$4,000

Leicester Unitarian Church
Leicester Savings Bank Fund \$4,500

**Los Angeles County Arboretum &
Botanic Garden**
Rosemary Davis Memorial Fund \$5,000

**Loxahatchee Club Scholarship
Foundation**
The LaVigne Family Fund

Luther Burbank Middle School
Rosemary Davis Memorial Fund \$2,395

Maine Sea Coast Missionary Society
Gordon Iver and Dorothy Brewer Erikson
Fund \$1,000

Maltz Jupiter Theatre
Herbert B. and Jayne Cohan Fund \$500

**Manufacturing Assistance Center
Foundation Worcester Vocational High
School**
Glenda and Arthur Wolpert Fund \$2,500

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

Massachusetts Audubon Society
Martha L. and William P. Densmore Fund
\$1,250
Frances M. Herron Fund \$1,800

Massachusetts General Hospital
Gordon Iver and Dorothy Brewer Erikson
Fund \$1,000
Newell and Betty Hale Fund \$1,000
Glenda and Arthur Wolpert Fund \$5,000

Massachusetts Historical Society
Elkanah B. Atkinson Community and
Education Fund

Merrick Public Library
Jeppson Memorial Fund for Brookfield
\$404

Middlesex School
Lawrence M. and Augusta L. Keeler Fund
\$426

Midstate Youth Hockey
John Carter "High Five" Youth Hockey
Fund \$300
Christopher J. Paskell Memorial Fund
\$450

Millbury Woman's Club
Mary B. Grogan Fund for Youth \$500

**Mohegan Council Boy Scouts of
America**
Polly C. and Joseph R. Carter Fund \$500
Robert G. and Eliza C. Hess Fund \$1,053
Leicester Savings Bank Fund \$1,200

Mount Desert Island Hospital
Gordon Iver and Dorothy Brewer Erikson
Fund \$5,000

Music Worcester
Jeppson Memorial Fund \$6,754

Named Beneficiaries of Trust for Injured Survivors of Tornado of June 1953
Central Massachusetts Disaster Relief Residue Trust Fund \$8,050

National Education for Assistance Dog Services
Martha L. and William P. Densmore Fund \$1,000
Katharine Higgins Riley Fund \$5,261

New England Historic Genealogical Society
Gordon Iver and Dorothy Brewer Erikson Fund \$500

North Brookfield Council on Aging
Jeppson Memorial Fund for Brookfield \$600

Northbridge Centre Congregational Church
Lawrence M. and Augusta L. Keeler Fund \$426

Organization Assistance Fund Grants
Grantee Names Withheld
for an executive transition \$20,000
for a technology plan \$9,500
for a strategic plan \$8,000
for a fund development plan \$5,000

Orthopaedic Research and Education Foundation
Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation

Our Lady of the Cape Parish
The LaVigne Family Fund

Performing Arts of Northeast Connecticut
Newell and Betty Hale Fund \$1,000

Performing Arts School of Worcester
Jeppson Memorial Fund \$3,426

Pernet Family Health Service
David R. and Rosalie A. Grenon Fund \$500
Gertrude Alice Johnson Fund \$1,000

Pomfret Community School
Newell and Betty Hale Fund \$1,000

Pomfret School
Newell and Betty Hale Fund \$1,000

Preservation Worcester
John M. Nelson Fund \$1,000

Quinebaug Valley Community College Foundation
Newell and Betty Hale Fund \$2,000

Quinsigamond Community College
Fairlawn Foundation \$8,000
Quota International of Worcester Fund \$250

Quota International Club of Worcester
Olive I. and Anthony A. Borgatti Jr. Fund \$1,000

Rainbow Child Development Center
Gertrude Alice Johnson Fund \$500
Paul and Fay Rossley Fund \$100

Raivaaja Publishing Company
Finnish Heritage Foundation Fund \$500

Rangeley Lakes Heritage Trust
Paul and Fay Rossley Fund \$100

Rangeley Region Health Center
Paul and Fay Rossley Fund \$200

River Tree Center for the Arts
Jeanne Remillard Curtis Fund \$300

Saint Andrews Hospital
Raymond P. Harold Memorial Fund \$2,483

Saint Peter's Catholic Church, Jupiter
The LaVigne Family Fund

Saint Peter's Church, Worcester
The LaVigne Family Fund

Salem Community Corporation
Elkanah B. Atkinson Community and Education Fund

Salvation Army of Worcester
Jeanne Remillard Curtis Fund \$1,000
Gertrude Alice Johnson Fund \$500

Search for Common Ground
Youth Across Borders Fund \$3,100

Senior Citizen Club of Leicester
Leicester Savings Bank Fund \$1,200

Seven Hills Foundation
Polly C. and Joseph R. Carter Fund \$1,000

The LaVigne Family Fund
Paul and Fay Rossley Fund \$100

Shrewsbury Fire Department
Olive I. and Anthony A. Borgatti, Jr. Fund \$500

Shrewsbury Youth and Family Services
Olive I. and Anthony A. Borgatti, Jr. Fund \$500

Super Stars Horizon Group CampFire USA
Mary B. Grogan Fund for Youth \$1,600

Temple Sinai
Corinne A. and Eugene J. Ribakoff Fund \$2,218

Thayer Memorial Library
Rosemary Davis Memorial Fund \$1,290

Town of Grafton
Edward P. Miner and Dauphinais Park Building Fund \$58,000

Town of Princeton
David and Barbara Krashes Fund \$14,350

Treats Falls House
Gordon Iver and Dorothy Brewer Erikson Fund \$500

Trinity Lutheran Church
Jeppson Memorial Fund \$27,114

Trinity-by-the-Cove Episcopal Church
Gordon Iver and Dorothy Brewer Erikson Fund \$1,000

Tufts University School of Veterinary Medicine
Rosemary Davis Memorial Fund \$90,000

University of Massachusetts Medical School Sandy C. Marks, Jr. Outstanding Medical Student Award
Sandy C. Marks, Jr. Biomedical Education Fund \$100

University of Massachusetts Medical School Graduate School of Nursing Fairlawn Foundation \$16,000

UMass Memorial Foundation
Hollis E. and Gwendolyn D. Alden Fund \$1,790
Lawrence M. and Augusta L. Keeler Fund \$402
Peter J. and Sophie Kosky Fund \$1,414
The LaVigne Family Fund
C. Bradford and Elizabeth C. Newell Fund \$1,349
Paul and Fay Rossley Fund \$500
H. Arthur Smith Fund \$6,902
Candi Tiarks Cancer Research Fund \$5,000
Harold Davis Woodbury Fund \$1,017

United Way of Central Massachusetts
Elkanah B. Atkinson Community and Education Fund
Polly C. and Joseph R. Carter Fund \$1,500
Jeanne Remillard Curtis Fund \$750
Henry B. and Jane K. Dewey Fund \$1,500
David R. and Rosalie A. Grenon Fund \$1,650
The LaVigne Family Fund
Arthur J. Remillard, Jr. Fund \$10,000
Corinne A. and Eugene J. Ribakoff Fund \$39,882
Paul and Fay Rossley Fund \$1,000
United Way of Central Massachusetts Fund \$142,919

University of Maine
Gordon Iver and Dorothy Brewer Erikson Fund \$1,000

Village Improvement Society of Dennis
Dana L. DeAngelis-McDonald Memorial Fund \$175

VNA Care Network
Jeppson Memorial Fund for Brookfield \$1,000

Wellesley College
Henry B. and Jane K. Dewey Fund \$1,000

WGBH Educational Foundation
Henry B. and Jane K. Dewey Fund \$1,500
Paul and Fay Rossley Fund \$1,000

Whitin Community Center
Lawrence M. and Augusta L. Keeler Fund \$427

Whitinsville Social Library
Lawrence M. and Augusta L. Keeler Fund \$426
John A. Rauth Fund \$1,043

Why Me, Inc.
Ann D. and Louis C. Iandoli Fund

WICN Public Radio
Marla Maykel Fund \$1,000

Williams College
Henry B. and Jane K. Dewey Fund \$1,000

Winchendon Youth Hockey
John Carter "High Five" Youth Hockey Fund \$300
Christopher J. Paskell Memorial Fund \$105

Worcester Academy
David R. and Rosalie A. Grenon Fund \$500
Chapin Riley Fund \$3,660
Paul and Fay Rossley Fund \$500

Worcester Art Museum
Olive I. and Anthony A. Borgatti, Jr. Fund \$500
H. Paul and Sara B. Buckingham III Fund \$102
Martha A. Cowan Fund \$1,316
Theodore and Marjorie M. Deitz Fund \$1,065
Henry B. and Jane K. Dewey Fund \$1,250
David R. and Rosalie A. Grenon Fund \$1,065
Honee A. Hess Partnership with Children Fund \$763
Jeppson Memorial Fund \$20,164
John M. Nelson Fund \$13,000
Louise R. and John F. Reynders Fund \$372
Marvin Richmond Fund \$2,269
Chapin Riley Fund \$3,660
Helen M. and Thomas B. Stinson Fund \$218
Worcester Art Museum Booth Family Fund for Education and Outreach \$99,358

Worcester Center for Crafts
Jeanne Remillard Curtis Fund \$300
George and Anna Krikorian Family Fund \$10,000
Louise R. and John F. Reynders Fund \$235

Worcester County 4-H Center
Glenda and Arthur Wolpert Fund \$1,000

Worcester County Food Bank
Jeanne Remillard Curtis Fund \$2,000

Worcester County Horticultural Society/Tower Hill Botanic Garden
H. Paul and Sara B. Buckingham III Fund \$103
Polly C. and Joseph R. Carter Fund \$1,000
Marla Maykel Fund \$2,000
Sarah Daniels Pettit and William O. Pettit, Jr. Fund \$279

Worcester County Mechanics Association
Julie Chase Fuller Endowment Fund for Mechanics Hall \$25,000
Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation
Paul and Fay Rossley Fund \$100

Worcester County Poetry Association
Worcester County Poetry Association's Worcester Review Fund \$1,958

Worcester Foundation for Biomedical Research
Hollis E. and Gwendolyn D. Alden Fund \$895
Theodore and Marjorie M. Deitz Fund \$1,000
Frances F. Mansfield Fund \$1,080

Worcester Fresh Air Fund
Quota International of Worcester Fund \$250
Glenda and Arthur Wolpert Fund \$1,000

“Culture is one of the most important and productive industries in Central Massachusetts.”



Worcester Historical Museum
Elkanah B. Atkinson Community and Education Fund
Barbara Allen Booth Fund \$13,648
Robert W. Booth Fund for the Worcester Historical Museum \$9,731
Robert W. Booth Fund for Salisbury Mansion \$27,330
Olive I. and Anthony A. Borgatti Jr. Fund \$2,000
Henry B. and Jane K. Dewey Fund \$1,000
Paul and Fay Rossley Fund \$200
Worcester Historical Museum Fund \$20,750

Worcester Polytechnic Institute
John M. Nelson Fund \$10,000

Worcester Public Library
Clarence S. Arms Family Fund \$592
Glenda and Arthur Wolpert Fund \$5,000

Worcester Public Schools
Marcia R. Katter Memorial Fund \$2,830

Worcester Regional Research Bureau
Worcester Municipal Research Bureau Fund \$2,835

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

Worcester State College
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Olive I. and Anthony A. Borgatti Jr. Fund \$750
Quota International of Worcester Fund \$500

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The Pyle Fund \$50,000

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Ross and Lisa Dik Fund \$300
Trust in Kids Fund \$3,200

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Leicester Savings Bank Fund \$3,000
Quota International of Worcester Fund \$250
Margaret and Gordon Torgersen Fund \$250

YWCA Daybreak Resources for Women & Children
Carolyn Knight Dik Fund \$250

WORCESTER CULTURAL COALITION: BUILDING CULTURAL CAPITAL

Culture is one of the most important and productive industries in Central Massachusetts. Worcester area cultural institutions rank among the city’s major employers and taxpayers and annually attract nearly one million visitors who spend more than \$48 million. Now in its sixth year, the Worcester Cultural Coalition brings together the leaders of Worcester’s more than 40 arts and cultural organizations to promote these cultural assets and advance Worcester’s economic revitalization.

“The Foundation has supported our work right along and was one of our first funders. Other city, state and private sector partners stepped up once they saw the Foundation’s seal of approval.

“We’ve developed a unified voice for the city’s artistic and cultural organizations and created an infrastructure to jointly promote our offerings that includes our Website and a weekly radio program on WTAG-AM, Weekends in Worcester. We’ve helped to foster more spaces for artists all over the city and by collaborating we’ve lowered our costs while increasing our reach and impact.

“The Coalition also instituted a cultural/economic development officer position. This individual works closely with the city manager. Worcester’s decision-makers are recognizing that arts and culture are tremendous assets.”

ELLEN DUNLAP, President, American Antiquarian Society, Member, Foundation board of directors

Donors and Funds

Services to Donors

The Foundation can help you to articulate and fulfill your philanthropic goals. We provide such assistance to individuals, businesses, families and even other foundations.

Whatever the size of your gift, you can put the resources of a \$100 million endowment and infrastructure to work to meet your community-centered philanthropic objectives. You can increase the value and impact of your charitable gift through our comprehensive planning and administrative services.

We provide a variety of charitable fund and gift options. Our staff can help you create the gift that makes the difference you want, maximizing both your tax advantages and your impact in the community now and in the future.

Philanthropy can be a complex and costly endeavor. We offer you power and flexibility in charitable giving without the paperwork, time and expenses associated with running your own private foundation. You gain the resources and variety of a sophisticated endowment investment program with the discipline to preserve endowment capital even during tough times and the longevity to grow the value and reach of your contribution over generations.

Our services to donors extend beyond the planning and administration of gifts. We provide donors with opportunities to learn more about current and emerging issues in our communities. These programs include guided visits to nonprofit organizations that are receiving Foundation grants and technical support. Donors value these close-up visits because they see the impact of their gifts firsthand and also gain insights into the immediate and long-term needs of our towns and cities.

Ways to Give

The Foundation welcomes gifts of any size and accepts a broad range of assets, including cash, publicly traded securities, closely held stock, real estate, life insurance, tangible personal property and private foundation assets.

You can make a gift to any of our existing funds (see pages 36 to 41) or, with a gift of \$10,000 or more, you can establish a fund of your own. A Named Fund is a flexible way to create your own personal legacy. You receive the maximum tax benefits allowed by law and the assurance that your intentions will be honored in perpetuity.

We award grants from your fund to support nonprofit organizations in accordance with your wishes. And we have the flexibility to adapt as institutions and needs evolve over time while fulfilling your long-term charitable goals.

You and your family are encouraged to continue giving to the fund to help it grow even more. Each gift enlarges the endowment and its earnings potential.

When to Give

You can contribute now or make a planned gift that benefits the community after your lifetime.

Options for planned giving include:

- Gifts by will
- Naming the Foundation as beneficiary of Individual Retirement Account assets
- Transfer of life insurance policies to the Foundation, which makes premium payments tax-deductible while creating a permanent charitable fund of \$10,000 or more
- Donation of retained real estate as a future gift while continuing to use the property throughout your lifetime
- Pooled income funds (minimum gift: \$5,000), charitable gift annuities (minimum gift: \$10,000) and charitable remainder trusts, vehicles that pay you income and, after your lifetime, support your charitable goals.

The **Foundation** can help you to articulate and **fulfill**
your philanthropic goals.

We provide such **assistance** to individuals, businesses,
families and even other foundations.

Acorn Society Members

The Acorn Society recognizes and honors those who have created a permanent legacy for the community through the Foundation with a deferred gift or estate plan.

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Leave a Legacy® is a program of the Planned Giving Council of Central Massachusetts to raise awareness about the importance and ease of bequest giving. The Greater Worcester Community Foundation was a founding member and provides financial management for its membership and education programs.

WORCESTER HISTORICAL MUSEUM AGENCY FUND

Drawn by the opportunity to earn more and spend less by using the resources of the Foundation, the Worcester Historical Museum recently transferred a portion of its endowment to the Foundation and created the Worcester Historical Museum Agency Fund.

“We’re very impressed with the Foundation committee that manages funds and we like the peace of mind that comes from allowing people to manage our funds who know what they’re doing and do it well. They manage an endowment many times larger than ours and they’re able to attract and hire managers and use investment vehicles that we could not access on our own. With highly qualified people managing our funds, we can turn our attention to improving our programs. And we’ve seen first hand the very positive impact that the Foundation has on the community. We demonstrate our belief in its importance by becoming part of it.”

LAURIE DAVIS, Chairman, board of trustees,
Worcester Historical Museum

“With highly qualified people managing our funds,
we can turn our attention to **enhancing** our programs.”



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\$100,000+

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“We want to give back to the community where my father built his business. My parents have had a longstanding commitment to a number of health care, education and arts organizations serving Northeast Connecticut, where our family and most of our company’s employees reside. They wanted to support these community organizations and, through the fund, each receives a stream of income into perpetuity.

“It made perfect sense for us to support the organizations my parents care about through the Foundation. Most are too small to have a charitable infrastructure, let alone one of the Foundation’s size and strength.

“As a financial planner, I often recommend the Foundation to clients who are doing estate planning because of our family’s very positive experience.

“If you have the desire to make a charitable gift, the Foundation’s flexibility and breadth of options will allow you to pretty much accomplish whatever you want.”

LAURENCE HALE, Vice President, Investments,
 Weiss & Hale Financial Advisors/Advest,
 Successor advisor, Newell and Betty Hale Fund

“If you have the desire to make a charitable gift,
 the Foundation’s flexibility and breadth of options
 will allow you to pretty much accomplish whatever you want.”

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Every effort has been made to ensure the accuracy of this list. If we have made an error, please let us know.

FOUNDATION FORUM

“The Worcester Foundation Forum was established in 1991 as a place for funders to discuss issues of common interest, such as families’ concerns about succession; processes for handling grant requests; how to invest and allocate assets; and the hiring and compensation of employees. The Community Foundation guides us in open, informed conversations.

“Our 45 members comprise the major corporations and private foundations in the city. Although each of us makes our own funding decisions, we share as our primary focus Worcester and the surrounding towns. Foundations founded by the city’s industrialists want to keep their dollars here. The Forum helps us stay on top of what’s going on.

“The Community Foundation chairs our group. It provides us with meeting space and access to the expertise of their staff. They put together an educational program of outside speakers on issues of philanthropy, such as approaches to solving housing problems, making loans versus grants, and new legislation proposed by the attorney general on the conduct of private foundations.

“Without these foundations, the quality of life would not be as good as it is here.”

SUMNER B. TILTON, JR., partner, Fletcher Tilton & Whipple, Foundation president
 1994-1997

“Without these foundations,
 the **quality** of life
 would not be as **good** as it is here.”



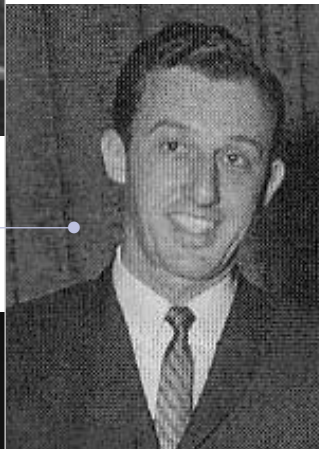
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New Funds

Every year, members of our community create new endowment funds, each broadening and deepening the reach of our services to the region. We highlight some of the 23 new funds established in 2004.

AVID North Scholarship Fund

Phyllis A. Goldstein, a longtime educator at North High School, along with her husband, Michael, inspired others to join with them to create this scholarship fund for students in AVID (Advancement Via Individual Determination), an in-school academic support program for grades 5-12 that prepares students for college eligibility and success. The first award will be made in 2005.

Elizabeth Trumbull Barton Fund

Trumbull Barton, a native of Worcester and resident of New York, donated one-third of his residuary estate to the Foundation for the benefit of the Rural Cemetery of Worcester. The fund is in memory of his mother, Elizabeth Trumbull Barton.

Hugh W. and Harriet K. Crawford Fund

Mr. and Mrs. Crawford had enjoyed serving as stewards of a private foundation until recently, when administration of it started to become more burdensome than satisfying. At the suggestion of their accountant and attorney, they transferred the assets of their private foundation to create a donor advised fund. It will eventually support the Pearl L. Crawford Memorial Library in Dudley, Massachusetts.

Duke Family Scholarship Fund

Created by family members to honor the teaching careers of John and Frances Duke, this fund will award scholarships to graduating seniors of St. Mary's High School and South High Community School.

East Brookfield Youth/Dynamy Fund

Barbara Fitts created this fund to enable graduates of East Brookfield Elementary School to participate in the Dynamy Youth Academy, a four-year, after-school leadership and college access program.

Emil Haddad Jazz Scholarship Fund

Honoring jazz musician Emil Haddad, this fund will award scholarships to help talented young musicians pursue the study of jazz in college.

Maureen Henrickson Memorial Scholarship Fund

Maureen Henrickson, a resident of Millbury, taught third grade at Sutton Elementary School for 32 years. After her untimely death from cancer in 2003, teachers, staff, parents and students at the school raised money to endow future scholarships in honor of their friend.

Celeste and Dave Lionett Donor Advised Fund

This fund was created by David and Celeste Lionett of Worcester as a vehicle for their family giving.

Lisi-Greene Fund

This donor advised fund was started in 2004 by Ann T. Lisi and Joel P. Greene.

Mary Falby Logan and Francis Logan, Jr. Scholarship Fund

The Boylston Historical Society created this scholarship with a bequest from the estate of Gertrude Falby to help residents of Boylston attend college.

MacLean Family Fund

This donor advised fund was created by Douglas and Vijaya MacLean as a vehicle for giving to a variety of community interests.

Magee Family Scholarship Fund for UMass Amherst

B. Dale Magee, M.D., a Shrewsbury physician, created this fund to provide students who are first in their families to attend college with full-tuition scholarships to the University of Massachusetts at Amherst.

Howard J. and Dorothy R. McGuinness Fund

Mrs. McGuinness was a registered nurse who wanted to help the hungry and homeless in her community. After her death in 2004, the Foundation received the proceeds from her retirement accounts to establish this designated fund to assist nursing students, the Worcester County Food Bank and Matthew 25.

Norcross Heritage Fund

This designated fund will contribute to the maintenance of the historically significant Norcross Mausoleums at Hope Cemetery.

Christopher J. Paskell Memorial Fund

Christopher Paskell was a member of the Lakers Youth Hockey team. Honoring his commitment to the game, this fund will enable low-income youth to participate in youth hockey, particularly members of the Lakers Youth Hockey League or its successor.

Renaissance Award Fund

A local citizen established this award to honor individuals in the Greater Worcester community who have made exemplary contributions as leaders of nonprofit organizations.

Barbara Marks Rothschild Arts and Education Scholarship Fund

Steven Rothschild created this scholarship fund for graduates of the Massachusetts Academy of Math and Science in Worcester to celebrate the life of Barbara Marks Rothschild as a wife, artist and educator.

Norman L. and Dorothy A. Sharfman Fund

Norman Sharfman, who died in July 2004 at age 89, is remembered as an activist businessman whose self-named jewelry store is a downtown institution. He created by bequest a permanent fund to address an enduring interest: to foster mentoring relationships that help young people turn their lives around.

Herbert D. Sherwin Memorial Scholarship Fund

Herb Sherwin was a Worcester native, successful businessman, civic activist and a leader in the Jewish community. He died in 1980 at age 53 after a long battle with lymphoma. His son, Jay, served as a program officer at the Foundation from 1992 to 1997. On the occasion of his marriage to Rachel Lefkowitz in 2004, Jay created this fund to honor his father's loyalty to the Worcester community and belief in the value of education. The fund will help local students transition from community colleges to complete their bachelor's degrees.

Alice C.A. Sibley Fund

The estate of Mrs. Sibley established this charitable trust to provide corrective eye treatment and care, including hospital and surgical fees as well as visual aids, to children and adults in need of financial support to obtain these services.

Alexander G. Simonatis Scholarship Fund

Alexander "Buster" Simonatis named the Foundation as a beneficiary in his will to create a permanent scholarship fund that will help Princeton residents graduating from Wachusett High School to attend college or a program in technical or vocational education. The first awards will be made in June 2005. A life-long Princeton resident, Mr. Simonatis owned a plumbing and heating supply business that served the town for more than 50 years.

Named Funds

For nearly 30 years, generous individuals, families and organizations have used the Foundation to manage their charitable giving through the establishment of named funds. These funds produce income to make grants to a variety of organizations and purposes. Each fund is defined by the donor in consultation with the Foundation at the time the fund is created.

Fund types include discretionary and field of interest funds that support the changing needs of the community; designated and agency funds that support a particular organization; scholarship funds that provide education assistance to students; and donor advised funds that allow donors to make grant recommendations.

Below is a listing of the Named Funds of the Foundation, followed by the year created and the fund balance as of December 31, 2004 (some balances have been omitted by donor request).

Discretionary Funds

Nils Bjork Memorial Fund (1992)
\$37,276

Robert W. Booth Fund in Memory of George F. Booth (1988) \$10,448,060

Elva E. and John J. Chisholm Fund (1989) \$5,634,936

Dr. Harold M. Constantian Fund (1997)
\$12,727

Robert and Mary S. Cushman Fund (1978) \$286,734

Richard C. Daniels Fund (2001) \$659,957

Jean B. and Gilbert S. Davis Fund (1994)
\$33,612

Ruth H. and Warren A. Ellsworth Fund (1983) \$109,533

EMC Community Fund (2000) \$39,096

Charles H. Farnum Fund (2003)
\$1,234,743

Marion Stoddard Fletcher Fund (1992)
\$1,472,876

Founders Fund (1983) \$433,213

Samuel Frank Charitable Fund (1993)
\$374,848

Esther and Howard G. Freeman Fund (1984) \$61,556

Garfield Berry Fund (1998) \$9,969

Ragnhild L. Gersdorf Fund (1994)
\$52,289

Haskell and Ina Gordon Fund (1980)
\$22,571

Nathan and Barbara Greenberg Fund (1982) \$160,372

Margery M. and O. Vincent Gustafson Fund (1980) \$75,189

Raymond P. Harold Memorial Fund (1982) \$150,204

Bradley C. Higgins Fund (1982)
\$160,064

Jeppson Memorial Fund (1976)
\$1,135,536

Albert R. and Carolyn Jones Fund (1995)
\$192,819

John F. and Rayna Keenan Fund (1994)
\$16,366

Nancy and Michael Leavitt Fund (1984)
\$5,410

Frances F. Mansfield Fund (2003)
\$25,433

Barbara S. Massey Fund (2000) \$841,313

Marlene and David Persky Fund (1997)
\$31,780

Ann J. and Richard Prouty Fund (1988)
\$378,372

Melvin and Martha Rosenblatt Fund (1985) \$62,852

H. Arthur Smith Fund (1986) \$79,794

Spag's Supply Fund (1986) \$33,914

Harry G. Stoddard Fund (1992) \$921,741

Estelle M. Sullivan Fund (2003)
\$167,765

Gilbert H. Sundberg Fund (1987)
\$29,163

D. Russell and Atsye S. Taft Fund (1992)
\$747,632

Mr. and Mrs. Robert H. Wetzel Fund (1983) \$319,300

Worcester Executives Association - Dana DeAngelis McDonald Fund (2000)
\$5,850

Robert J. and Anne C. Whipple Fund (1997) \$7,834

Field of Interest Funds

Andrew N. Ahlfors and Helmi E. Ahlfors Trust (2002) \$253,776

Lois Anne Memorial Fund (1993) \$26,315

Clarence S. Arms Family Fund (1986) \$6,801

Fund for the Arts and Humanities (1993) \$205,555

The Auburn Foundation (2002)

Olive I. and Anthony A. Borgatti Jr. Fund (1987) \$181,102

Bowditch & Dewey Fund (1989) \$185,168

Robert S. and Helen A. Bowditch Fund (1990) \$62,105

Cancer Care and Research Fund (1991) \$18,323

John Carter "High Five" Youth Hockey Fund (1996) \$13,990

Central Massachusetts Health Standards Fund (1990) \$139,505

Child Wellness Fund (2001) \$10,571

Children's Christmas Fund (1991) \$16,400

Barbara E. and William E. Christensen Fund (1998) \$56,492

Fairman C. Cowan Fund (1995) \$53,483

Anna S. and Warren G. Davis Fund (1998) \$12,691

Rosemary Davis Environmental Preservation Fund (2001) \$53,807

Sarah B. and Dix F. Davis Fund (2002) \$13,525

Eliza D. and Cora J. D. Dodge Fund (1985) \$6,064,373

Fairlawn Foundation Fund (1991) \$8,807,842

Fallon/OrNda Community Health Fund (1996) \$4,950,177

Finnish American Social Club Fund (1998) \$246,476

Finnish Heritage Foundation Fund (1991) \$12,275

Friends of Learning in Killingly (FOLK) Fund (1998) \$71,108

Greater Worcester Community Scholarship Fund (2000) \$3,634,386

Greater Worcester Jaycees Fund (1997) \$36,672

Mary B. Grogan Fund (2001) \$60,567

Francis A. and Jacquelyn H. Harrington Human Services Fund (1992) \$1,336,968

Rosemary Marble Harris Fund (2001) \$22,591

Harriet Miller Hight Education Fund (1982) \$50,501

Robert M. and Carolyn G. Hyde Fund (1998) \$39,641

Jeppson Memorial Fund (1976) \$156,564

Jiji's Fund (1999) \$17,846

Marian B. Kubelus and Marian Zell Nesbit Fund (1984) \$597,526

Leicester Savings Bank Fund (1997) \$1,097,238

Main South Fund (1999) \$39,020

Micah Housing Corporation Fund (1981) \$16,269

James J. and Patricia A. Moynihan Fund (2003) \$106,886

Marc Needleman Memorial Fund (2000) \$7,794

Organization Assistance Fund (1996) \$187,915

Partnership Fund (1990) \$215,893

Christopher J. Paskell Memorial Fund (2004) \$16,630

Providence & Worcester Railroad Company Fund (1991) \$61,187

Saint Vincent Healthcare Fund (1999) \$151,044

Norman L. and Dorothy A. Sharfman Fund (2004) \$335,817

Sumner Lee Sharfman Fund (1984) \$81,373

Alice C.A. Sibley Fund (2004) \$513,000

Shepherd Knapp School Fund (1979) \$627,612

H. Arthur Smith Fund (1986) \$318,228

Joseph A. Tosoni Fund (2002) \$623,065

Tree Fund (2000) \$7,077

Corinne Charron Turner Fund (1986) \$20,125

UniBank September 11th Emergency Personnel Education Fund (2002) \$27,503

Water and Land Stewardship Fund (2000) \$259,538

Curtis G. Watkins Education Fund (1995) \$18,771

Irving N. and Annabel Wolfson Fund (1998) \$9,972

Worcester County Deputy Sheriffs Association Fund (1999) \$18,272

Worcester Credit Bureau Fund (1992)
\$1,453,534

Youth for Community Improvement Fund (2002) \$10,494

Youth Opportunity Fund (1981)
\$874,939

Donor Advised Funds

Argitis Family Fund (2004) \$25,270

Clarence S. Arms Family Fund (1986)
\$6,801

Association of Colored Peoples Fund (1996) \$2,470

Elkanah B. Atkinson Community and Education Fund (1986)

Olive I. and Anthony A. Borgatti Jr. Fund (1987) \$182,613

Dr. and Mrs. Edward Budnitz Fund (1995) \$35,551

The Douglas P. Butler Fund (1998)
\$14,138

Marcia Butzel Fund (2001)

William R. and Janet A. Carrick Fund (1998) \$23,800

Wynne L. Chase Fund (1998) \$157,341

Maureen Logan Coghlin Fund (2001)

Herbert B. and Jayne Cohan Fund (2000) \$25,635

Paul E. Cohan Fund (2000) \$25,894

Hugh W. and Harriet K. Crawford Fund (2004) \$752,356

Elizabeth A. Culhane Memorial Fund (2000) \$11,107

Jeanne Remillard Curtis Fund (1999)

Melvin S. Cutler Fund (1986) \$14,753

Rosemary Davis Memorial Fund (2000)
\$2,424,067

Dana L. DeAngelis-McDonald Memorial Fund (2002) \$12,082

Gene J. DeFeudis Fund (1991) \$109,736

Mary C. DeFeudis Fund (1991) \$109,736

Theodore and Marjorie M. Deitz Fund (1993) \$36,262

Martha L. and William P. Densmore Fund (1999) \$47,075

Henry B. and Jane K. Dewey Fund (1994) \$120,639

Morgan B. and Loretta R. Dewey Fund (2001) \$10,671

Ross and Lisa Dik Fund (1993) \$13,647

Carolyn Knight Dik Fund (1998) \$16,016

Barbara M. and Irving James Donahue Jr. Fund (1993) \$12,835

Gordon Iver and Dorothy Brewer Erikson Fund (1996) \$37,743

A. Jane Fitzpatrick, M.D. and Edward F. Kilroy, M.D. Fund (1998) \$10,655

Phyllis and Stuart Freilich Charitable Fund (1999) \$82,663

Judge and Mrs. William Garbose Fund (1998) \$50,063

Lillian R. Goodman and Mary K. Alexander Fund for Nursing Education and Research (1999) \$37,706

Margaret A. and Ralph H. Gowetz Fund (1990) \$33,027

Lois B. and Robert F. Green Fund (2001)
\$12,863

David R. and Rosalie A. Grenon Fund (1986) \$199,567

Newell and Betty Hale Fund (2001)
\$1,182,837

Joseph F. and Claire L. Halvey Fund (2002) \$6,488

Raymond P. Harold Memorial Fund (1982) \$140,597

Harris Family Fund (2001) \$10,746

Frances M. Herron Fund (1997) \$74,642

Ann D. and Louis C. Iandoli Fund (1986)

Gertrude Alice Johnson Fund (2002)
\$63,126

W. David and Lee Norton Kelly Family Fund (2002) \$14,734

Kesseli and Morse Company Fund (1998) \$9,477

Augusta H. Kressler, M.D. Fund (2002)
\$15,369

George and Anna Krikorian Family Fund (1994) \$260,153

Lionel M. and Cynthia E. Lamoureux Fund (2000) \$11,282

The LaVigne Family Fund (1992)

Anne A. Levine Fund (1995) \$12,853

Celeste and Dave Lionett Donor Advised Fund (2004) \$20,114

Lisi-Greene Fund (2004) \$2,565

Konstantina B. Lukes Fund (1986)
\$7,028

MacLean Family Fund (2004) \$19,932

Sandy C. Marks Jr. Biomedical Education Fund (2003) \$16,452

Marla Maykel Fund (2001) \$47,915

C. Jean and Myles McDonough Fund (1988) \$25,067

Winifred Meany Killay and Matthew Meany Memorial Fund (2003)

James J. and Patricia A. Moynihan Fund (2003) \$26,973

John M. Nelson Fund (1990) \$210,410

Ernest Osterman Family Fund (2004)

Pakachoag Church Outreach Ministry Fund (1999) \$58,661

Arthur M. Pappas and Martha R. Pappas Donor Advised Foundation (2002)

Pelletz Family Fund (2003) \$54,531

Town of Petersham Fund (1984) \$141,922

The Pyle Fund (1986) \$455,811

Quota International Club of Worcester Fund (1998) \$11,051

Charles E. Soule Paul Revere Insurance Group Centennial Fund (1995) \$61,073

Paul and Fay Rossley Fund (1995) \$121,135

Charles E. Scott Community Fund (1997) \$10,807

Seven Hills Youth Fund (1995) \$8,760

Candi Tiarks Cancer Research Fund (1996) \$10,281

Tobin Family Fund (1999) \$16,721

Margaret and Gordon Torgersen Fund (2000) \$13,814

Margaret W. and Richard P. Traina Fund (1999) \$12,927

Trust in Kids Fund (1987) \$59,020

Amos E. and Ann Laura Wasgatt Fund (1997) \$30,207

Todd H. and Charlotte A. Wetzel Fund (1992) \$22,729

Glenda and Arthur Wolpert Fund (1999) \$126,450

Designated Funds

Hollis E. and Gwendolyn D. Alden Fund (1977) \$123,737

Clarence S. Arms Family Fund (1986) \$13,621

Elizabeth Trumbull Barton Fund (2004) \$290,950

Barbara Allen Booth Fund (2001) \$120,122

Booth Family Fund for Worcester Art Museum Education and Outreach (1999) \$2,344,413

Robert W. Booth Fund for Salisbury Mansion (1995) \$488,083

Robert W. Booth Fund for the Worcester Historical Museum (2002) \$329,578

Bosler Humane Society Fund (1986) \$49,186

H. Paul and Sara B. Buckingham III Fund (2000) \$9,639

Polly C. and Joseph R. Carter Fund (1987) \$238,071

John P. Castagnetti Memorial Fund (2003) \$12,283

Central Massachusetts Disaster Relief Residue Trust Fund (1980) \$83,523

Chesson Family Fund (1991) \$16,591

Martha A. Cowan Fund (1987) \$40,621

Ethel S. Cunningham Fund (1987) \$106,087

Directors and Corporators Fund (1984) \$272,488

Douglas Center Cemetery Preservation Fund (1999) \$12,912

East Brookfield Youth/Dynamy Fund (2004) \$10,000

Marjorie G. and Elmer E. Ellison Jr. Fund (2001) \$13,108

Newell Hale Memorial Fund (2003) \$22,243

Ginette Harrison, M.D. Memorial Fund (2001) \$82,578

Hendricks House Preservation Fund (1999) \$113,096

Honee A. Hess Partnership with Children Fund (1996) \$19,377

Robert G. and Eliza C. Hess Fund (1979) \$97,064

Holden Council on Aging/Senior Center Fund (2003) \$6,972

“The **Foundation** is a huge asset to this community, which is a very philanthropic city. A lot of the nonprofit organizations serving Worcester couldn’t survive without it. And the **Foundation helps** donors who want their charitable giving managed but don’t want to do it themselves.”

BARBARA FARGO, Foundation corporator and member of Scholarship Committee

“I like being allied
with the Foundation,
which is a positive
force in the community.”

DOUGLAS P. BUTLER FUND

“I took part of the taxable gain from a real estate sale to start a donor advised fund, which enabled me to avoid taxes while setting up a way of giving that pleases me. The Foundation and its processes provide me with an orderly way to manage my philanthropic urges. Foundation staff make it easy: I just send them a list of grantees and they take it from there. Beyond this convenience, I like being allied with the Foundation, which is a positive force in the community. Its philanthropic work is well known and well respected here and I feel glad to be part of it.”

DOUG BUTLER

Jeppson Memorial Fund (1976)
\$2,113,195

Marcia R. Katter Memorial Fund (2001)
\$72,196

Lawrence M. and Augusta L. Keeler Fund (1997) \$71,414

Paul J. and Dorothy B. Kervick Fund (1996) \$25,495

Peter J. and Sophie Kosky Fund (1988)
\$48,859

John W. Lund Fund (1993) \$154,451

Frances F. Mansfield Fund (1996)
\$75,797

Sonia Werblin Masterman Fund (2001)
\$13,350

Howard J. and Dorothy R. McGuinness Fund (2004) \$36,072

Edward P. Miner and Dauphinais Park Endowment Fund (2003) \$19,021

Vasiliky Strates Moschos Memorial Fund (2002) \$14,747

Rani P. and Haribabu Muddana M.D. Fund (2001) \$32,494

C. Bradford and Elizabeth C. Newell Fund (1999) \$69,536

Norcross Heritage Fund (2004) \$10,886

Sarah Daniels Pettit and William O. Pettit Jr. Fund (1996) \$27,875

Paul M. Pezzella Fund in Memory of Patsy and Theresa Pezzella (1999)
\$15,486

John A. Rauth Fund (2001) \$26,892

Arthur J. Remillard, Jr. Fund (1993)
\$613,305

Renaissance Award Fund (2004)
\$128,639

Louise R. and John F. Reynders Fund (1987) \$34,126

Marvin Richmond Fund (1998) \$50,289

Chapin Riley Fund (2000) \$345,196

Katharine Higgins Riley Fund (1991)
\$156,115

Rogers-Kennedy Memorial Fund (2003)
\$2,699

Saul A. Seder Fund (1991) \$15,635

H. Arthur Smith Fund (1986) \$397,907

Khazma A. Soffan Memorial Fund (2000) \$57,826

Helen M. and Thomas B. Stinson Fund (2001) \$11,500

Mary Louise Wilding-White Fund (1978) \$97,814

Harold Davis Woodbury Fund (1987)
\$46,891

Worcester Arts and Humanities Education Collaborative Fund (2002)
\$12,684

Worcester Engineering Society Fund (1989) \$20,425

WTAG Christmas for Children Fund (2000) \$78,805

Agency Funds

African Heritage Institute Fund (1997)
\$4,627

American Red Cross of Central Massachusetts Fund (2000) \$11,456

Auburn Youth and Family Services Endowment Fund (2000) \$24,784

Father Miguel Bafaro Fund for Centro Las Americas (1998) \$6,539

Barre Players Endowment Fund (1997)
\$7,808

Big Brothers/Big Sisters Mentoring Fund (1999) \$44,411

Charlton Parent Teacher Organization Fund (1999) \$19,146

Douglas Historical Society Fund (2000)
\$84,558

Dynamy Fund (1997) \$30,694

Emmanuel Baptist Church Endowment Fund (1994) \$23,958

Lois S. Feldman Fund for Massachusetts Association for the Blind (1990) \$22,983

First Congregational Church of Douglas Endowment Fund (1999) \$32,181

Friendly House Fund (2000) \$41,013

Friends of Gale Free Library 110th Endowment Fund (1998) \$251,900

Friends of Northbridge Elders Fund (1997) \$38,757

Julie Chase Fuller Endowment Fund for Mechanics Hall (1989) \$588,760

Great Brook Valley Health Center Fund (1984) \$367,970

Greater Worcester Land Trust Fund (1988) \$45,258

Roberta Gunn Fund for Board Development (2003) \$12,196

Joy of Music Program Beveridge and Frances Webster Endowment Fund (2000) \$36,053

Lincoln Village Tenants Association Fund (1997) \$3,834

Matthew 25 Fund (1997) \$106,310

Millbury Public Library Endowment Fund (1991) \$79,834

National Memorial Trust Fund (1990) \$11,560

South Worcester Neighborhood Center Growth Fund (1985) \$47,085

Tatnuck Brook Watershed Fund (1996) \$3,540

United Way of Central Massachusetts Fund (1987) \$3,204,171

Worcester Area Association for the Education of Young Children Fund (1998) \$13,619

Worcester County Law Library Trust Fund (1998) \$607,626

Worcester County Poetry Association Founders Fund (2002) \$18,322

Worcester County Poetry Association's Worcester Review Fund (2000) \$74,849

Worcester Historical Museum Fund (2002) \$1,662,005

Worcester Municipal Research Bureau Fund (1989) \$68,533

Worcester Public Library Fund (1992) \$23,833

Youth Opportunities Upheld, Inc. Fund (1987) \$337,871

Scholarship Funds

Helen P. Arsenault Memorial Scholarship Fund (2000) \$12,200

Auburn Woman's Club Fund (2000) \$23,743

AVID North Scholarship Fund (2004) \$2,730

Belmont Street Community School Scholarship Fund (2000) \$11,403

Loretta J. Belval Scholarship Fund (2002) \$31,556

Mary and John Buckley Memorial Education Fund (1998) \$22,528

Charlton Parent Teacher Organization Fund (1999) \$9,846

Commonwealth Gas Employees' Credit Union Scholarship Fund (2003) \$43,269

Mary Connolly Memorial Scholarship Fund (1999) \$8,680

December 3rd Scholarship Fund (1999) \$1,333,672

Santo J. and Ellen M. DiDonato Memorial Scholarship Fund (1999) \$227,042

Duke Family Scholarship Fund (2004) \$3,217

Jeffrey S. Edinberg Memorial Scholarship (2002) \$14,036

Elm Park Community School Scholarship Fund (1987) \$52,509

Mary R. Fedeli Memorial Scholarship Fund (2002) \$52,080

Anita and Nathaniel A. Feingold Scholarship Fund (1994) \$10,131

Norma and Saul Feingold Fund (1983) \$17,224

Earl P. Fontaine Memorial Fund (2003) \$8,733

Janet Fraser Scholarship Fund (1999) \$236,666

Friends of Rutland Heights Hospital Permanent Fund (1993) \$58,512

Derek Gaudette Memorial Scholarship Fund (1995) \$27,998

Matthew Gignac Memorial Scholarship Fund (1999) \$14,687

Robert P. Goulet Memorial Scholarship Fund (1998) \$6,870

Greg's Grant Fund (1997) \$160,258

General Scholarship Fund (1990) \$211,640

Emil Haddad Jazz Scholarship Fund (2004) \$15,572

Joseph F. and Claire L. Halvey Scholarship Fund (2002) \$6,074

Maureen Henrickson Memorial Scholarship (2004) \$10,264

Debbie Anne Johnson Memorial Fund (1993) \$35,509

Jenica Lynn Junnila Memorial Scholarship (2000) \$12,693

Deborah A. Kaufman Scholarship Fund (1990) \$17,792

Lawrence M. and Augusta L. Keeler Scholarship Fund (1978) \$158,724

Leicester Samaritan Nursing Association Fund (1996) \$36,454

Mark MacPherson Lightbown Memorial Scholarship Fund (1980) \$109,114

Lincoln Village Scholarship Fund (2001) \$23,434

Mary Falby Logan and Francis Logan Jr. Scholarship Fund (2004) \$21,457

Lunenburg Opportunity Fund (1999) \$233,735

Lieutenant James F. "Jay" Lyons III Memorial Scholarship Fund (2001) \$70,478

Magee Family Education Fund (2003) \$15,716

Magee Family Scholarship Fund for UMass Amherst (2004) \$26,624

Frances F. Mansfield Fund (2003) \$26,517

Howard J. and Dorothy R. McGuinness Fund (2004) \$36,072

Anthony E. Mickunas Memorial Scholarship Fund (1987) \$81,197

Michael Minty Memorial Scholarship Fund (1988) \$22,009

Anne Carey Murphy Memorial Scholarship Fund (2001) \$44,522

Nichols Academy Marilyn T. and Gerald Fels Scholarship Fund (2001) \$97,992

Nichols Academy Scholarship Fund (2001) \$67,162

Arnold and Sylvia Nylund Scholarship Fund (2001) \$10,707

Sarah Daniels Pettit and William O. Pettit Jr. Fund (1996) \$64,774

Richard W. Pierce Fund (1985) \$822,545

Arthur J. Remillard Jr. Scholarship Fund (2001) \$114,211

Barbara Marks Rothschild Art and Education Scholarship Fund (2004) \$13,327

Ida and Murray Rotman Scholarship Fund (1985) \$115,129

Andrew Sala Memorial Scholarship Fund (1998) \$55,251

Herbert D. Sherwin Memorial Scholarship Fund (2004) \$15,167

William J. Short Scholarship Fund (2002) \$46,280

Alexander G. Simonatis Scholarship Fund (2004) \$447,152

John J. Simpson Jr. Memorial Fund (1993) \$4,260

Steelman Expository Writing Scholarship Fund (1999) \$11,749

Sylvia Gafvert Stubblebine Fund (1989) \$52,226

Swedish National Federation Fund (2001) \$17,438

Tahanto Regional High School Scholarship Fund (1997) \$69,184

Paul E. Tarkiainen Art Award Fund (1995) \$27,668

Sumner B. Tilton Memorial Scholarship Fund (1985) \$1,972,919

Laurie C. Tinsley Scholarship Fund (2002) \$88,846

Carmen Tobin Nursing Scholarship Fund (1995) \$53,555

Walker Magnetics Fund (1982) \$30,872

Webster Square Business Association Scholarship Fund (2002) \$6,075

Leroy Weiner Scholarship Fund (2000) \$55,932

Paul J. Westberg Memorial Scholarship Fund (2000) \$9,576

Mary Olive Wood Scholarship Fund (1992) \$993,638

Worcester Swedish Charitable Association Fund (2001) \$54,285

Worcester Woman's Club Fund (1999) \$105,336

Worcester Latino Coalition Scholarship Fund (1999) \$11,189

**BLACKSTONE VALLEY:
PRESERVING THE PAST WHILE BUILDING THE FUTURE**

Known as the birthplace of America's Industrial Revolution, the Blackstone Valley is a land of rivers, woodlands and historic mill towns. The 400,000-acre region is also home to more than one million people and a magnet for development. A resident of Blackstone Valley since 1994, UniBank Senior Vice President Laura Bronwell is among the people who are working to foster economic growth that preserves the quality of life in Blackstone Valley.

"The Blackstone Valley is developing very rapidly. We treasure our parks, lakes and beautiful residential communities and at the same time we want to strengthen our economy. Community partnerships are striving to preserve the character and rich history of the region while supporting environmentally friendly growth. With its resources and broad understanding of community needs, the Foundation pulls towns together and encourages collaboration among agencies. Without it, we'd achieve a lot less."

LAURA BRONWELL, Senior Vice-president, UniBank, Chair, Blackstone Valley Chamber of Commerce Foundation corporator and member of Water and Land Stewardship Fund Committee

"With its resources and broad understanding
of community needs,
the Foundation pulls towns together and
encourages collaboration among agencies."



Statements of Financial Position

December 31, 2004 (With Summarized Financial Information for 2003)

	<u>2004</u>	<u>2003</u>
Assets		
Cash	\$ 263,180	\$ 114,317
Accounts receivable	2,506	9,705
Prepaid expenses	23,296	17,485
Pledges receivable	104,470	745,435
Investments	99,983,145	91,205,736
Split interest agreements:		
Net investments held in trust by others	1,581,348	1,647,920
Net interest in charitable remainder trust	123,242	112,304
Net interest in charitable gift annuity	333,733	276,813
Cash value of life insurance	194,523	177,542
Property held for investment	565,000	565,000
Notes receivable	28,433	40,826
Property and equipment, net	74,416	85,645
	<u>\$ 103,277,292</u>	<u>\$ 94,998,728</u>
Liabilities and Net Assets		
Distributions payable	\$ 817,519	\$ 585,437
Accounts payable	19,624	123,134
Accrued expenses	27,249	15,710
Funds held as agency endowments	5,324,542	3,860,332
	<u>6,188,934</u>	<u>4,584,613</u>
Net assets: ⁽¹⁾		
Unrestricted	597,125	400,863
Temporarily restricted	28,142,606	24,876,633
Permanently restricted	68,348,627	65,136,619
	<u>97,088,358</u>	<u>90,414,115</u>
Total liabilities and net assets	<u>\$ 103,277,292</u>	<u>\$ 94,998,728</u>

(1) Certain amounts in the 2003 summarized financial statements have been reclassified to conform to the 2004 presentation. Net assets of \$11,686,869 that were previously reported as unrestricted net assets designated for distributions in the 2003 financial statements, have been reclassified to temporarily restricted net assets as the donors have imposed a specific use for the contributed assets.

An audit of the Greater Worcester Community Foundation's financial statements as of, and for the year ended December 31, 2004, was conducted by Stowe & Degon. A complete copy of the audited financial statements may be obtained by calling the Foundation at 508.755.0980.

Statements of Activities

December 31, 2004 (With Summarized Financial Information for 2003)

	Unrestricted	Temporarily Restricted	Permanently Restricted	Totals 2004	Totals 2003
Revenue, gains, and other support					
Total net investment return	\$ 20,253	\$ 7,525,826	\$ -	\$ 7,546,079	\$ 17,546,542
Less: Investment return for agency endowments	(23)	417,378	-	417,355	788,312
Net investment return	20,276	7,108,448	-	7,128,724	16,758,230
Total Gifts and donations	309,223	2,237,987	3,204,175	5,751,385	6,467,088
Less: Gifts and donations for agency endowments	-	1,139,364	13,017	1,152,381	205,088
Gifts and donations	309,223	1,098,623	3,191,158	4,599,004	6,262,000
Change in split interest agreements	-	101,769	-	101,769	164,090
Other support	27,548	86,546	20,850	134,944	42,503
Satisfaction of purpose restrictions	5,129,413	(5,129,413)	-	-	-
Total	5,486,460	3,265,973	3,212,008	11,964,441	23,226,823
Expenses:					
Total Distributions	4,490,807	-	-	4,490,807	3,988,423
Less: Distributions for agency endowments	88,025	-	-	88,025	87,485
Distributions	4,402,782	-	-	4,402,782	3,900,938
Other	48,895	-	-	48,895	159,157
Administrative	838,521	-	-	838,521	777,917
Total	5,290,198	-	-	5,290,198	4,838,012
Change in net assets	196,262	3,265,973	3,212,008	6,674,243	18,388,811
Net assets, beginning of year	400,863	24,876,633	65,136,619	90,414,115	72,025,304
Net assets, end of year	\$ 597,125	\$ 28,142,606	\$ 68,348,627	\$ 97,088,358	\$ 90,414,115

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Staff

Kerry L. Conaghan
Program Officer
conaghan@greaterworcester.org

Joelle Kanshepolsky
Development/Communications Officer
joellekan@greaterworcester.org

Pamela Keogh, CPA
Finance Officer
pkeogh@greaterworcester.org

Ann T. Lisi
Executive Director
atlisi@greaterworcester.org

Debra Medeiros
Program Officer
dmedeiros@greaterworcester.org

Gail T. Randall
Special Projects Officer
grandall@greaterworcester.org

Joanne M. Reegan
Finance Assistant
jreegan@greaterworcester.org

Cynthia Rielley
Office Manager
crielley@greaterworcester.org

Wendi Stein
Grants Manager
wstein@greaterworcester.org

Greater Worcester Community Foundation
370 Main Street, Suite 650
Worcester, MA 01608-1738
508.755.0980 *tel*
508.755.3406 *fax*

www.greaterworcester.org

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