

THE ACORN



NEWS FROM THE GREATER WORCESTER COMMUNITY FOUNDATION



Photo courtesy of Alternatives Unlimited, Inc.

Foundation boosts Blackstone Valley's new knowledge economy with \$10,000 grant to Alternatives Unlimited, Inc. lead partner of ValleyCAST
Building community is the business of Alternatives Unlimited, Inc., a Whitinsville agency that helps disabled adults earn valued roles.

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Investing in youth: Bringing hope and opportunity to young learners

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Agency Fund Honors Touchstone Community School's First Two Decades, Seeds its Future

Touchstone Community School in Grafton established an agency endowment fund in March.

“Our capital campaign raised money for salaries and financial aid and we had to invest it wisely,” says Dick Zajchowski, who retired in June after 18 years as headmaster. “After assessing numerous options, we chose the Foundation. We already had a relationship, its investment services were solid, and we’d gain visibility in the nonprofit community.”

Over several years, Foundation grants have helped the school establish a library, put a computer in every classroom and acquire reading and writing experts for a literacy project.

“When the Foundation began supporting us, we were a tiny school with no track record,” says Dick. “What we had then was lots of potential and a passionate commitment to progressive education. Now we are established as a progressive, independent school for students aged 4 through 14 in Central

Nonprofits Increase Return, Reduce Costs with Agency Funds

Drawn by the opportunity to earn more and spend less by using our sophisticated investment management resources and services, more than 35 nonprofits have established agency funds with the Foundation.

A nonprofit can establish an agency fund with a minimum investment of \$10,000. The Foundation owns the fund and makes distributions in accordance with the agency's wishes as stated in the fund agreement. While enjoying superior return, the agency gains community-wide visibility through the Foundation, which can be a fund-raising asset.

To find out more, contact Joelle Kanshepolsky by phone (508) 755-0980 or via e-mail: joellekan@greaterworchester.org.

Massachusetts. The endowment celebrates this accomplishment. Our partnership with the Foundation helps us ensure that Touchstone will be around for a long time.”

New Educational Fund for Disadvantaged Youth Awards First Grants

Mentoring, tutoring and scholarships encourage college education

The Foundation has awarded the first grants from the Greater Worcester Community Scholarship Fund: Ruth and John Adam, Founders.

The purpose of the \$3.5 million endowed fund is to identify and support financially and culturally disadvantaged students early in their academic careers so they may acquire the motivation and skills to enter and graduate from college.

When proposing the fund, Jack Adam, president emeritus of the Foundation (1980-83), wrote, “We want to open the minds of students who demonstrate ability but may not even think about attending college due to their upbringing or economic status. Youngsters born at the bottom of the economic ladder tend to stay at the bottom. They are less aware of the rest of the world and its opportunities.”

Jack urges “all who agree with our purpose” to provide gifts to expand the endowment and to volunteer as mentors and tutors to these young people.

In the coming year, the Foundation will be unveiling the scholarship component of the Fund. Stay tuned.

Following are the recipients of this year's grants, which total \$69,500:

- Bancroft School (\$7,500) for the Worcester Partnership Program, a collaboration with the Elm Park Community School to provide students with year-round academic support



courtesy of Touchstone Community School



Foundation Executive Director Ann Lisi volunteered as an after-school teacher with Citizen Schools at Worcester East Middle School last spring. She is shown here with her young apprentices on the stage at Mechanics Hall, after rehearsing an oration by Frederick Douglass.

- Dynamy, Inc. (\$12,000) for the Youth Academy, a four-year, after-school leadership and college access program
- Worcester Polytechnic Institute (\$10,000) for its MASTER program with the Higher Education Resource Center to boost minority students' skills in math and science
- Y.O.U., Inc. (\$10,000) for the Bruce Wells Scholars program, an intensive four-year academic support program with Clark University and the Worcester Public Schools
- YMCA of Greater Worcester for Minority Achievers, an after-school academic and leadership program (\$15,000) and for Citizen Schools, an after-school program at A.L.L. School and Worcester East Middle School in career exploration, writing, leadership, and community awareness (\$15,000)

East Brookfield Graduate Celebrates 50th Reunion by Creating Scholarship Fund for School

The East Brookfield Youth/Dynamy Fund was created by East Brookfield native Barbara Fitts last year. The endowed fund will enable graduates of East Brookfield Elementary School to participate in the Dynamy Youth Academy, a four-year leadership program for high school students. A Dynamy graduate is eligible for a tuition scholarship from a school within the Colleges of Worcester Consortium.

"East Brookfield is a small, rural town," says Barbara, who graduated from the town's school 50 years ago. "Growing up there was a very happy experience. And we had marvelous teachers."

The only girl in her class to obtain a college degree directly after high

school, Barbara put herself through Boston University through scholarships and four jobs. Her 37 years in education have included a decade teaching at Barnard College. While in New York, she also directed a recreation program at Lighthouse International serving 350 visually impaired clients.

Barbara brought the Foundation her dream of giving back to her beloved town and school. "The Foundation led me to Dynamy and helped us create a wonderful package," says Barbara. "With the Foundation managing the endowed fund on our behalf, this program can grow and go on forever.

"My parents inspired my ambition," Barbara continues. "My education opened up my life. I want to give other students the opportunity to reach high in their lives."



East Brookfield Youth/Dynamy Fund founder, Barbara Fitts, pictured with the first scholarship recipient, Victoria Sanborn.

Nonprofit Leaders Strengthen Skills and Networks at Management Institute

What can the executive directors of a clock museum, a regional food bank and a neighborhood community center learn from each other? Plenty, as they and nine other leaders of nonprofit organizations found out at the 2005 Executive Directors Management Institute.

This biannual, six-week program of the Nonprofit Support Center brings agency executive directors together with national and local experts for sessions on a variety of core management capabilities. They learn the latest practices in the field and, just as important, come to know each other.

4 “Nonprofit leaders oversee multiple areas,” says Gail Randall, the Foundation’s special projects officer, “including fundraising, relationship building, working with boards, advocating and lobbying, hiring and firing, financial reporting and strategic planning. They receive little preparation. Many come up through the program side of an organization as caregivers or curators, not MBAs.”

Like all Nonprofit Support Center programs, the Institute encourages peer networks. “In study after study,” says Gail, “executive directors say that one of their most important resources is a group of people in the same role.”

Gaining new perspectives, tools—and colleagues

Participants had the opportunity to work with a personal coach on an individual challenge or interest, support that is important in a dynamic and demanding profession. New in 2005, the coaching component was made possible with funding from the George I. Alden Trust.

“Coaching helped me see the synergy between how I engage an audience as a musician and how I could lead a board meeting,” says Scott M. Graves, executive director of the Thayer Symphony Orchestra and Community Music School in Leominster. “I’ve achieved a whole new level of communication with my board.”

“Our board meetings are no longer ‘nod-and-clap’ sessions,” says Robert M. Jokela, executive director of Children’s Aid & Family Service in Fitchburg. “Our strategic planning is now far more participatory. And I learned how other agencies face the same challenges that we do, such as determining how to remain vibrant and relevant.”

“Coaching helped me focus instead of trying to do too many things and feeling it’s never enough.”

As the first executive director of the Southeast Asian Coalition of Central Massachusetts, Thuha Le found her first months on the job “overwhelming.” The Institute helped her gain new perspective and tools. “I understand better how to work with the board and community and how to build my skills,” says Thuha. “I am more confident in my role. And coaching helped me focus instead of trying to do too many things and feeling it’s never enough.”

Kathryn Zingg Hunter began her YMCA career 25 years ago, when she took her first job after college at the Springfield Y. Now, she is president and CEO of the YMCA of Greater Worcester, which employs 600 people.

“I’ve had a great first year,” says Kathryn, “and a straight-up learning curve. The Institute came at a perfect time and provided really good con-

tent, opportunities for coaching and networking, and a fantastic facilitator, Patsy C. Lewis [executive director of the Worcester Community Action Council]. I enjoyed getting to know others in the same role and look forward to working together to build a stronger community.”

2005 Executive Directors Management Institute participants:

Sean M. Boyce, *Cleghorn Neighborhood Center, Fitchburg*

Dianne Bruce, *Edward Street Child Services, Worcester*

Brian J. Dubois, *Clark Memorial Community Center, Winchendon*

Scott M. Graves, *Thayer Symphony Orchestra and Community Music School, Leominster*

Robert M. Jokela, *Children’s Aid & Family Service, Fitchburg*

Kathryn Zingg Hunter, *YMCA of Greater Worcester*

Thuha Le, *Southeast Asian Coalition of Central Massachusetts, Worcester*

Jean G. McMurray, *Worcester County Food Bank, Shrewsbury*

Ann McTigue, *ArtsWorcester, Worcester*

Orlando Rodriguez, *Centro Las Americas, Worcester*

John Stephens, *Willard House & Clock Museum, North Grafton*

Jim Zuberbuhler, *Dynamy Inc., Worcester*

For more information on upcoming Nonprofit Support Center programs, contact Gail Randall at (508) 755-0980 or visit our website: www.greaterworcester.org



Patsy C. Lewis Receives Foundation's First Annual Renaissance Award

Pioneering award honors and thanks city's nonprofit leaders with \$5,000 cash prize

A highlight of the Foundation's 30th annual meeting, held on May 17 at Mechanics Hall, was the presentation of the Foundation's first annual Renaissance Award. The recipient was Patsy C. Lewis, executive director of the Worcester Community Action Council since 1987.

Foundation Executive Director Ann T. Lisi presented the award to Patsy, whom she described as "a leader dedicated to empowering others, helping the community's poorest residents and strengthening Worcester's nonprofit sector."

Ann cited some of the many successes associated with Patsy, including the establishment of CityWorks, Worcester's AmeriCorps program; and the creation of Individual Development Accounts, a new way for low-income individuals to save for home ownership.

"This award is a great honor," says Patsy. "I am thrilled to be its first recipient. And to be recognized as a mentor is extremely rewarding to me."

Award celebrates and rewards nonprofit leadership

An anonymous Foundation donor established the Renaissance Award to recognize and thank nonprofit leaders who devote their time and talents to making Worcester a better place. Singling out an individual rather than an organization, the award comes with a \$5,000 cash prize from an endowed fund. The donor's strongest desire is that the recipient will use the money to pursue a personal goal or interest.

The Foundation's executive committee selects the recipient from nominees recommended by the staff and board. Candidates are individuals who have demonstrated for five years or more a strong commitment to the nonprofit sector, leadership and professional accomplishment, talent in fostering collaborative relationships, and imaginative thinking combined with constructive action.

The Renaissance Award is one more way that the Foundation nurtures the leaders of area nonprofit organizations.

Charitable Gift Annuities Guarantee Higher Returns for Life

A charitable gift annuity (CGA) through the Greater Worcester Community Foundation may suit a donor who wants to:

- Benefit a cause or nonprofit in perpetuity
- Reduce income and capital gains taxes
- Secure a lifelong income stream at a higher rate than other fixed-income investments.

In return for a minimum gift of \$10,000 in cash or marketable securities, the Foundation pays a guaranteed, fixed-dollar amount to one or more designated recipients for life, regardless of the earnings on the invested gift. After the recipient's death, the Foundation uses the proceeds to establish a named fund that carries out the donor's charitable goals in perpetuity.

CGAs provide recipients over the age of 65 with a fixed income stream from 6-to-11.3%. Rates and tax benefits increase with the age of the donor.

Given current market conditions, CGAs may be the right vehicle at the right time for certain donors. Over the last two years, CGAs with the Foundation have increased fivefold.

"Investors in bank CDs and Treasury bonds may be frustrated by current returns of 3-4%," says Foundation corporator Tom Bartholomew, president, Bartholomew & Company, Inc. "With a CGA, they can make a gift and obtain predictable income that supplements other fixed-income sources. They fulfill their charitable goals, gain favorable rates and get the tax deduction. It's a win-win."

To find out more, contact Joelle Kanshepolksy by phone (508) 755-0980 or via e-mail: joellekan@greaterworcester.org.



Photo courtesy of Alternatives Unlimited, Inc.

Foundation Invests in Blackstone Valley's Second Industrial Revolution

Grant promotes new, knowledge economy through ventures in arts, culture and science

Alternatives Unlimited, Inc. of Whitinsville has received a \$10,000 grant from the Foundation to provide partial funding for ValleyCAST - The Blackstone Valley Culture, Arts and Science Together initiative.

Alternatives is the lead partner of ValleyCAST, which aims to build a creative, inclusive and prosperous community by promoting Valley-wide development rooted in artistic, cultural and scientific ventures.

The hub of this eleven-town initiative is the renovated Whitin Mill complex, also the headquarters of Alternatives, which has been providing residential and employment services to adults with developmental and psychiatric disabilities since 1976.

"We can better serve our clients by transforming the mill into a crossroads where people of all abilities form relationships around common interests," says Dennis H. Rice, executive director of Alternatives. "For 20 years we employed our clients in a sheltered workshop, which unfortu-

The renovated Whitin Mill complex is the new headquarters of Alternatives Unlimited, Inc.

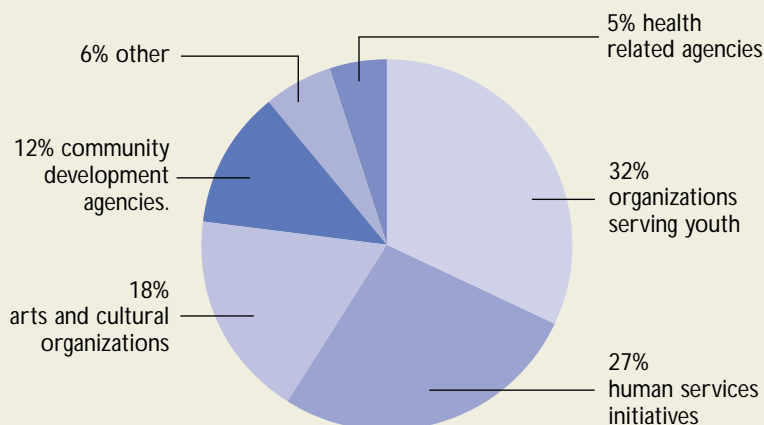
nately isolated them. We've replaced it with storefront career centers on main streets in four towns that are integrated with other businesses. We're taking this approach to the next level with ValleyCAST."

Alternatives has gained \$1 million towards its \$3 million capital campaign, hired a cultural coordinator for ValleyCAST and will renovate the mill into quarters that invite innovation and collaboration, including a community plaza, a training/performance center and space for artisans. The Whitin Mill complex is on the riverfront of Whitinsville, a village in the heart of the Blackstone Valley, the engine of America's Industrial Revolution. Uniting old and new technologies, the mill will have self-sustaining climate control systems that employ its original water turbine as well as rooftop photovoltaic solar panels and two geothermal wells—all visible to visitors.

"By bringing the community and our clients together," says Dennis, "we do a better job of helping the people we serve to achieve the real homes, jobs and relationships that they deserve. And we build a stronger community for everyone."

Spring 2005 Discretionary Grants Award \$807,500 to 73 Programs

The ValleyCAST grant was one of 73 awards totaling \$807,500 that the Foundation distributed in the spring phase of its twice-yearly discretionary grantmaking cycle, which resumes in the fall. Discretionary funds allow the Foundation to address pressing needs and promising opportunities throughout Worcester County. Spring distributions supported nonprofits working in a variety of areas, including:



For the full list of recent grants, visit our website www.greaterworcester.org

News of Our People



◀ **Ross K. Dik** became President on May 17th following **Michael D. Brockelman** who served as President for three years. Ross is the President of Knight-Dik Insurance Agency. Ross says, "Our donor community is growing by the year. We have more than 340 funds including 23 that we added in the past year alone. Meanwhile, more organizations and programs are emerging that merit our support. I look forward to many more years of continued growth."

Pamela K. Boisvert, a vice president at the Colleges of Worcester Consortium and chair of the Foundation's distribution committee, testified before the Senate Committee on the importance of providing educational opportunities for low-income adults to aid them in becoming productive members of society.



Joelle Kanshepolsky was appointed Director of Development and Communications to replace **Audrey Klein-Leach**, who left in September 2004 to join the Bank of America. Joelle has a Master of Management and Social Policy from Brandeis University and most recently was the marketing manager at Families First Parenting Programs in Cambridge.

Linda Chadwick was recently hired as Donor Services Officer, replacing **Wendi Stein** who joined the Vermont Community Foundation earlier this year. Linda holds a Master of Science degree from Princeton University and was most recently executive director of the Master Singers of Worcester.

Senior Program Officer **Deb Medeiros** has become certified as a volunteer, court-appointed special advocate for children (CASA) who come before the courts as subjects of abuse and neglect cases. **Deb** received a partial scholarship from the Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership to attend an advanced seminar at The Grantmaking School in Washington DC, the nation's first university-based program for teaching the

techniques and ethics of grantmaking to foundation professionals.

Gail Randall, special projects officer, was a guest at the University of Mississippi's annual seminar, "The Fourth Estate and the Third Sector," a fellowship on nonprofits and journalism sponsored by the Knight Foundation for newspaper and media professionals.

Area Youth Participate in National Leadership Conference

Youth for Community Improvement (YCI) members Kitty Cortes and Natasha Hopkins represented the Foundation at the 2005 Youth Grantmakers Summer Leadership Conference, held at Central Michigan University in June. Sponsored by the Council of Michigan Foundations, the annual, international conference brings together participants in youth philanthropy programs for three days of workshops.

Sharing know-how with peers, the teenagers explore best practices in youth philanthropy and form networks to continue their learning—and new friendships—when they return home.

"I enjoyed interacting with teen grantmakers from around the country and I picked up a lot of great new ideas," says Kitty, a senior at Doherty High School. "I met many groups that do community service every month and make it an integral part of their program. Although we also participate in an annual volunteer project, I plan to propose to YCI that we volunteer more often as it would make us even stronger grantmakers."

Now in its fifth year, YCI has engaged over 75 high-school students in grantmaking and leadership development. In 2005, YCI distributed \$30,000 to ten nonprofit organizations.



YCI members at 2005 Annual Meeting.

Who We Are, and What We Do

The Greater Worcester Community Foundation is a grant maker, a resource for philanthropy and a community builder. It was founded in 1975 by local citizens who envisioned a coordinated endowment as a means to build a cohesive and vibrant community and to respond to changing conditions.

Now, according to the Council on Foundations, there are more than 800 community foundations in the U.S. and over 1200 in the world.

In 30 years, the Greater Worcester Community Foundation has awarded \$45 million to cultural, service and civic organizations and has built a charitable endowment exceeding \$100 million in over 340 named funds. We provide seed capital and ongoing support to local agencies; college scholarships to area students; and a way for donors to make a positive difference in their communities.

For more, please visit our website www.greaterworcester.org.

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courtesy of Safe Homes

Youth from Safe Homes presenting at their annual holiday party.

Foundation Receives Grant from National Lesbian and Gay Community Funding Partnership

Initiative key to mission of making Greater Worcester safe and welcoming for all residents

The Foundation has applied for and received a challenge grant of \$100,000 from the National Lesbian and Gay Community Funding Partnership. Its purpose is to expand funding opportunities and resources for local gay, lesbian, bisexual and transgender (GLBT) people. We join 38 community foundations already working with the New York-based Partnership by

acquiring this grant, which requires the Foundation to secure \$200,000 in matching funds.

Consistent with the Foundation's mission of building healthy and vibrant communities in the Greater Worcester area, our GLBT initiative expands upon our inclusion agenda, which strives to make Worcester a safe and welcoming community for all residents.

The Foundation has been supporting GLBT needs for more than a decade, primarily in the area of safe homes for youth. Members of GLBT communities are vulnerable to harassment, violence, workplace discrimination, homelessness and substance abuse. The Foundation will use the Partnership grant to stimulate community-wide commitment and resources to protect the human rights of GLBT people.

Our primary activities as a grantee include:

- Establishing a diverse, representative advisory committee for the GLBT initiative
- Creating and building an endowed fund to support GLBT programs
- Assessing the needs of Greater Worcester's GLBT communities
- Developing a grant program based on this assessment
- Educating the community about GLBT issues.

"The Foundation has a track record of building broad-based momentum to address the needs of our underserved residents," says Ross Dik, Foundation board president. "Our Partnership grant enables us to deepen our engagement with the GLBT community."



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