

THE ACORN



NEWS FROM THE GREATER WORCESTER COMMUNITY FOUNDATION



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Jack Adam (left) and the late Norman Sharfman confer at the 1998 annual meeting. Through their vision of education, the youth of Worcester will benefit now and in the future.
On the cover: June Eressy, principal, leads two learning centers.

Clark collaborative prepares more students in Main South for college success

Donors invest in a program and proven model to equalize educational opportunity

In the heart of Worcester's Main South neighborhood, where few adults have earned high school diplomas, a public school is sending 100% of its students to college. The University Park Campus School (UPCS) engages its students—Main South youth admitted by lottery—in a rigorous but supportive college preparatory program. All students passed the 2005 MCAS on their first try, 87% at the advanced level.

Established ground-up in 1997 as a joint venture between the Hiatt Center for Urban Education at Clark University and the Worcester Public Schools, the UPCS is on Newsweek's 2005 list of the nation's top 100 high schools.

UPCS-like learning environments will benefit more Main South students thanks to a \$200,000 grant

from the Foundation to the Hiatt Center to develop the Main South Secondary School Collaborative. This multi-year program aims to support two existing public schools in their efforts to achieve the UPCS level of success. The first is the Accelerated Learning Laboratory (ALL) for grades 7 through 12, which serves 440 students. The

“Ours is not a top-down process. We'll work on shoring up expectations and building consensus to define our vision for the school.”
— June Eressy

school was formed in June by splitting ALL, which formerly spanned pre-kindergarten through Grade 12, into two schools housed in the same building. Next, the program will expand to South High School.

Like the UPCS, the Collaborative grew out of the University Park Partnership between Main South and its neighbor, Clark University. “The Collaborative extends our

mutually beneficial relationship,” says Jack L. Foley, Clark's vice president for government and community affairs and a member of the Worcester School Committee. “Clark students learn from mentoring youth and working with some of the city's finest teachers. Clark graduate programs provide professional development to teachers and administrators, and high school seniors are on campus taking college courses.”

Year one: the community defines its school

ALL and UPCS share the same principal, June Eressy, who acknowledges the challenges of transforming an existing school while relishing the advantages. “The kids are great, the teachers are wonderful, and the school is truly part of the neighborhood,” says June. “And both the school and community are open to change.

“This is our planning year,” June continues. “Ours is not a top-down process. We'll work on shoring up expectations and building consensus to define our vision for the school. We want ALL to be a learning community in

A model for success

Schools participating in the Main South Secondary School Collaborative will adopt key elements of the UPCS model, which include:

- A culture of high expectations, rigor and achievement
- Uniform honors-level curriculum for all students
- Mentoring, coaching, homework help from teachers, volunteers and peers
- Strong parental involvement
- A professional learning community committed to best practices
- Access to Clark University courses for juniors and seniors

which teachers, students and families are all equally invested.”

Matching opportunity with donor vision

The initial Foundation grant draws from the *Norman L. and Dorothy A. Sharfinan Fund* and the *Greater Worcester Community Scholarship Fund: Ruth and John Adam, Founders*. The Foundation intends to support the Collaborative for multiple years based on annual reviews of its progress against targeted outcomes. Much of the support will come from the *Greater Worcester Community Scholarship Fund: Ruth and John Adam Founders*, a \$3.7 million endowment dedicated to helping disadvantaged youth successfully pursue a college education.

One of the Foundation’s seven founders and its second president (1980 to 1983), Jack Adam admires the UPCS model, which puts his own ideas to work. “We’re targeting youngsters who require not just scholarship money but

From school prankster to champion of educational change

“I’ve received a lot of help from a lot of people,” says Jack Adam, 92, a 1933 graduate of South High School who credits mentors for his academic and career success.

“I used to be a nuisance in school,” says Jack. “It was great fun.” By his second year at South, according to his principal, Jack had failed more subjects than any other student. But after an economics teacher befriended him, Jack began to apply himself. As a junior, he became a straight-A student and in senior year he was president of his class.

While Jack was a freshman at Clark, a professor convinced him that living away from home was part of a college education. This

professor helped Jack obtain a full scholarship and job at Miami University in Ohio. After earning straight A’s at Miami, Jack took the advice of another professor and transferred to a more challenging school, Oberlin College.

Bringing an entrepreneurial spirit to the insurance industry, Jack led the reorganization of two failing companies. “We pushed decisions and responsibilities as far down the line as we could, with plenty of coaching,” says Jack. “We were building the kind of company we had always wanted to work for. Our people loved it. So did I. People can do anything if they want to enough and believe their future is in their control.”

support that helps them ‘want to’ enough,” Jack wrote when establishing the fund in May 1994. He proposed three strategies, each a match with the UPCS model: “First, early intervention,” wrote Jack.

“Second: coaching, support and raising expectations throughout high school years; and third: funds for college expenses. This program then could become a model for other communities.”

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JEWISH FAMILY SERVICE SUSTAINS ELDERS



“We strive to be the final trustworthy, dependable person in our client’s life,” says Stephen Slaten, Ph.D., executive director of Jewish Family Service.

Foundation nurtures County’s only elder guardianship program

Foundation grants and guidance are helping the Jewish Family

Service (JFS) of Worcester sustain the only elder guardianship program serving Central Massachusetts.

Through its case managers, the agency manages the affairs of elders who are no longer competent to make their own decisions.

Overseeing its clients’ financial, health and housing needs on a 24/7 basis, the agency often works in concert with clergy, health care professionals, nursing homes and lawyers. “We strive to be the final trustworthy, dependable person in our client’s life,” says Stephen Slaten, Ph.D., executive director of the agency.

In 1986, the Worcester JFS became the first agency in the state to assume the role of court-

appointed guardian and is today one of the state’s largest providers of such care. Serving 100 elders at a time, most of whom are indigent, the agency writes off 70% of its fees for guardianship services. Program revenues from state contracts and grants from such organizations as the United Way have leveled off or declined while case management and legal activities have increased in volume and complexity.

“The Foundation has been an important resource for us,” says Dr. Slaten, “providing annual grants of \$15,000 for the past five years and also helping us do strategic planning to ensure the future of our program.”

Fourth annual donor insights tour explores services for homeless families

Children as well as adults are among the homeless. At night in Worcester County, almost 200 families rely on emergency or transitional shelters. Thousands more resort to doubled-up housing. During the day, public schools in Worcester also serve children living in shelters or on the street. These children suffer more hunger and other health problems, including developmental delays, than peers in low-income families with stable homes.

Yet many homeless families find a foothold for building more stable lives through services that address the interrelated issues that trigger a downward spiral into homelessness—including substance abuse, mental illness, and chronic unemployment.

Participants in the 4th annual Donor Insights Tour, “Homelessness and Families: Sites and Solutions,” examined effective programs for such families by meeting with service providers, including many Foundation grantees.

Like previous Insights Tours, the September 6th event enabled caregivers, fund holders and trustees of other foundations to learn together about an urgent local problem as well as promising solutions.

School as well as shelter

Traveling by bus, the group visited four programs in various Worcester neighborhoods and settings, from a refurbished convent and elementary school to a Victorian house indistinguishable from neighboring homes. These sites included Abby’s House, the



Dave McMahon, co-director of Dismas House (upper left), spoke about homelessness. The tour included a stop at Faith House (above) and at the College of the Holy Cross, where students provided their unique perspective on this important issue. At left are distribution committee member Brian Chandley, Ann Lisi and Michael McFarland, S.J.

second shelter for women founded in the U.S. after Rosie’s Place in Boston. The multi-service complex provides emergency, transitional and permanent housing.

Next, participants learned about group living at the Village at Cambridge Street and the Friendly House Emergency Shelter, where clients share apartments. At Faith House (Community Healthlink), a recovery program for women addicts, a resident described her successful struggle to become sober and reunite with her children.

Also addressing the group was the principal of Elm Park Community School, Ruthann Melançon, who described the challenges that homeless children face in the classroom.

Accompanying the group as guides were Dave McMahon, co-director of Dismas House; Ginger Navickas, program director of YWCA/Daybreak Resources for Women and Children; and Grace Carmark, executive director of the Central Massachusetts Housing Alliance.

The tour concluded with a reception at the College of the Holy Cross hosted by its president, Michael McFarland, S.J. He introduced student volunteers who spoke about working with the homeless at programs throughout the city. 🍷

To find out more about homeless services in our area, contact Joe Wiinikka-Lydon, 508-755-0980 ext. 109 or by email, joewl@greaterworcester.org

Investment Committee strives to preserve and grow donor gifts

Donors establish funds with the Foundation to improve lives and conditions in Greater Worcester. The Foundation's 388 funds comprise an endowment worth more than \$115 million. Through its Investment Committee, the Foundation preserves and grows these assets as a resource for generations to come as well as a source of annual grants.

"We strive to meet or exceed the Board's annual earnings goal of eight percent," says Dix F. Davis,

Why 8%?

The annual earnings goal covers grants (4.5%), administrative fees (average 1.0%) and adjustment for inflation (about 2.5%)

Committee chair since May 2005 and a retired vice president of Allmerica Financial. Since 1994, annual returns have averaged 9.6%. Over the last three years ending June 2006, investments have earned 11.8%.

Seven of the eight volunteers on the ten-person Committee have worked in financial services for more than two decades. Convening quarterly, the Committee determines investment allocations; hires and fires the fund managers who execute these strategies; and reviews performance.

Prime, Buchholz & Associates has been the Committee's investment consultant for more than a decade. "Our consultant has no alliances with any investment manager," says CFO Pamela Keogh, one of two Foundation staff members on the Committee.

"He offers independent judgment that guides us toward the best opportunities."

The Foundation currently invests in eight sectors through 13 fund managers. "Over the past year and a half," says Dix, "we've diversified more to achieve greater return and more stable principal."

The Committee assesses results by each segment as well as by the portfolio as a whole. "But we don't panic or get too elated by each quarter's results," says Pamela. "We're investing for the long term."

Like other Foundation committees, the Investment Committee thrives on the diverse perspectives of its members. "Each of our decisions takes a great deal of research and the best thinking of



Dix Davis, treasurer and chair of the investment committee, reviews strategies and results at the 2006 annual meeting.

our volunteers," says Executive Director Ann Lisi, a Committee member. "Together, we arrive at the best decisions for the Foundation."

Acorn Society seeds future benefits for community—and income for donors

The Acorn Society recognizes and honors donors who have created a legacy for the community through gifts that begin or grow after their death.

"Making a deferred gift can be as simple as including the Foundation as a beneficiary of your 401K or IRA account," says Foundation Executive Director Ann T. Lisi. "Instead of allowing assets to dwindle by taxation, after your death they become a tax-sheltered, named fund that nourishes your community."

While fulfilling their desire to leave behind a legacy that benefits Worcester, donors may also obtain tax-free income from a planned gift or bequest. "Let's say that you and your spouse are in your early 70s," says Society member Tony Tilton, an estate-planning attorney. "You've held GE stock for decades with a wonderful capital gain. What to do?

"If you sell it, you receive the proceeds less 20.5% in taxes on the gain. Or you might give the stock to the Foundation via a charitable remainder trust. The Foundation sells it and buys corporate bonds that yield six percent to you as a lifelong, tax-sheltered stream of income. You don't pay capital gains and you receive the charitable deduction. After your death, the trust goes to the Foundation as your named fund in perpetuity."

Acorn Society members participate in special donor events throughout the year, including the annual meeting, investment breakfast, and insights tour. Please let us know if you have made a planned gift so that we may add you to our honor roll of Acorn Society members.

Find out how a planned gift may help you achieve your financial and charitable goals by contacting Ann Lisi at 508-755-0980 or by email, atlisi@greaterworcester.org

Foundation advances GLBT Partnership with countywide study

Respondents report safety and health risks, and hostility at school, work and home

Gay, lesbian, bisexual and transgender (GLBT) individuals—particularly the young—are vulnerable to harassment, violence, workplace discrimination, homelessness, substance abuse and suicide. As a result, the GLBT population in Worcester is largely a hidden community, according to a study commissioned by the Foundation, which is leading Worcester County in recognizing and addressing disparities in human rights and services faced by GLBT people.

6 Meeting the challenge through understanding

In 2005, the Foundation secured a \$100,000 challenge grant from the National Lesbian and Gay Community Funding Partnership. This grant requires the Foundation



Emily Ferrera, Rodney Glasgow and Dr. Peter Levine (not shown) are leading the GLBT Partnership.

to raise \$200,000 in matching funds within two years for a grant pool dedicated to expanding services and support for GLBT communities. The Foundation has established an advisory committee representative of Greater Worcester's diverse GLBT population to guide its initiative—entitled the GLBT Partnership—and its three phases:

- The recently completed study
- Fundraising to build the endowment
- A grantmaking program slated to begin in September 2007

The Foundation's comprehensive study, *Voices of Gay, Lesbian, Bisexual and Transgender People in Worcester County* was conducted by Nonprofit Solutions Associates. Its components included web-based surveys of 376 residents and 58 local service providers. About 75% of the respondents said they lacked information about services and support, and almost half stated that they go outside Worcester, mainly to Boston, for health care. Safety in schools was the most urgent issue for 55% of the participants. Many proposed a GLBT community center complemented by a newsletter, web site or resource directory.

A diverse city is a thriving city

"The Foundation has convened some wonderfully intelligent leadership to ensure the success of the GLBT Partnership, which strives to protect the human rights of our neighbors regardless of their sexual orientation," says Dr. Peter H. Levine, MD, honorary co-chair of the advisory committee, president emeritus of UMass Memorial Health Care, Inc., and a Foundation director.

Co-chairing the advisory committee are Rodney Glasgow,

Director of Diversity and Community Relations at Worcester Academy, and Emily Ferrara, an assistant professor in the Family Medicine and Community Health Department of the UMass Medical School.

"My job is to create a safe space for people to be themselves," says Rodney, who moved to Worcester a year ago. "That starts by creating a safe space where I can be myself as an 'out' gay man and an African American. A city that embraces, protects and serves all of its residents is good for everyone. A diverse city is a thriving city."

"I came out a decade ago," adds Emily, a Worcester resident for eighteen years. "Worcester is ready to go beyond its current, smaller initiatives for GLBT people and, through the Foundation, reach the entire community." 🍌

Review the report at www.greaterworcester.org

It takes a community

Change doesn't happen through great ideas alone. It takes understanding, effort, and money.

There has never been a better time to make a contribution to the *GLBT Partnership Fund* at Greater Worcester Community Foundation.

Not only will your gift be matched by the challenge grant, but you'll be part of a growing number of GLBT people and their allies, private foundations, and corporations who have already raised more than \$45,000 for this important local initiative.

Help us to create a community that is welcoming to all.

To find out more about the *GLBT Partnership* or to make a donation, contact Linda Chadwick, 508-755-0980 ext. 108 or by email, Lchadwick@greaterworcester.org



Linda Cavaioli receives 2006 Renaissance Award

The Foundation conferred its second annual Renaissance Award at the 31st Annual Meeting on May 17. Executive director Ann T. Lisi presented the award to Linda Cavaioli, executive director of the YWCA of Central Massachusetts.

"As a director of a nonprofit organization," says Linda, "I try to make my organization as successful

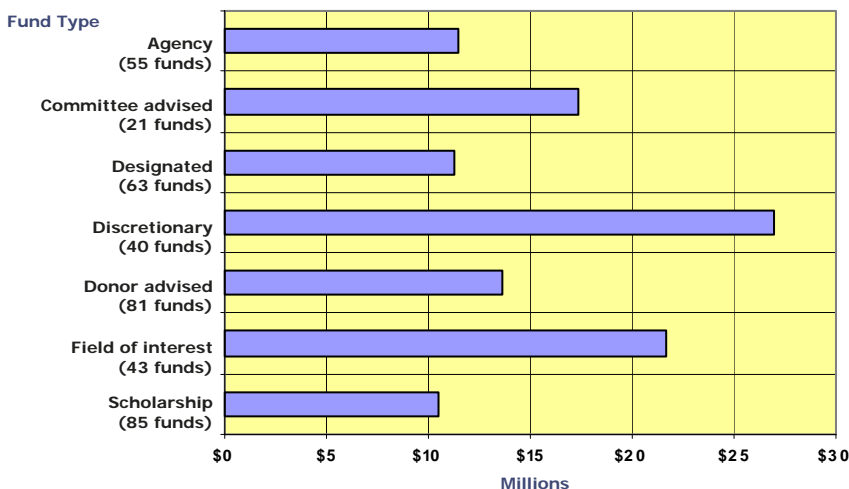
as possible. But this award recognizes our responsibility as leaders to also serve the broader community and inspires me to continue reaching beyond the walls of my own agency."

A Leominster native, Linda became executive director of the YWCA when it was undergoing transition and financial challenges. She restored its fiscal health and expanded a host of programs, including comprehensive services to victims of domestic abuse as well as new and enhanced after-school, daycare and summer camp facilities.

Singling out an individual rather than an organization, the Award came with a \$6,009 cash prize. Linda and her husband John will use the gift to visit Italy in the spring. "It's our first two-week vacation," says Linda, whose itinerary will include the hometowns of her grandparents. "We're fulfilling a lifelong dream." ■

Foundation funds reflect diverse interests

Twenty-two new funds were established during the twelve-month period ending August 31, 2006, with initial gifts ranging from \$10,000 to \$1.9 million. Scholarship (7), agency (5), and designated (4) funds account for nearly three-quarters of this increase. Of the entire portfolio, eighty-three percent of all funds are designed to exist in perpetuity. ■



TOTAL INVESTMENTS = \$115,588,861 TOTAL FUNDS = 388 (as of August 31, 2006)

Our Mission

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

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 \$50 million to cultural, service and civic organizations and has built a charitable endowment exceeding \$115 million in over 388 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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THERE FROM THE START



Twelve affordable condos will be ready for January 2007 occupancy.

New, affordable homes replace vacant lots in South Worcester

The Foundation is often among the first to back ventures that promise to enhance the quality of life for Worcester residents. Grants from the Foundation have helped the South Worcester

Neighborhood Improvement Corporation (SWNIC) launch and develop its affordable housing initiatives, which began in 2003.

“The neighborhood has faced quite a few challenges,” says Marshalee Ellis-Kehlhem, development director at SWNIC. “Over the years, as jobs left the area, homes fell into disrepair. The worst were bulldozed, leaving derelict lots. Those who could afford to moved away. According to the 2000 census, only 25 percent of South Worcester residents owned their homes while the citywide homeownership rate is 40 percent.”

From 2004 through 2006, grants from the Foundation totaling \$20,000 helped the agency meet the operating costs of its Affordable Home Development Program. “We’re stabilizing the community by increasing home ownership each

year,” says Marshalee. “We achieve this through adaptive reuse of old industrial buildings, gut renovation of abandoned buildings and infill development.”

The program has constructed 12 affordable condos (shown at left), now being marketed for January 2007 occupancy. The agency has purchased the former City Builders Supply Company, which will be the site of 25 condos. A SWNIC renovation project helps current homeowners bring their properties up to code.

“Each Foundation grant has enabled us to raise about \$70,000 per year in additional project delivery funds,” says Marshalee. “Funders want to associate with other reputable organizations. Our relationship with the Foundation strengthens our application and makes us favorable to other funders.”

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370 Main Street, Suite 650
Worcester, MA 01608
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