GROWING the GOOD

Greater Worcester Community Foundation
2017 Annual Report
### TABLE of CONTENTS

2017 Highlights ........................................................................................................... 2

**Growing the Good, Together**

Nurturing Children by Strengthening Parents .......................................................... 4
Increasing Access to Life-Enhancing Care .................................................................. 6
Encouraging Achievement and Growth ...................................................................... 8
Fostering Creative Connections of All Kinds ............................................................. 10

**Grant Highlights** ................................................................................................... 12

**Named Funds** ......................................................................................................... 16

Discretionary and Field of Interest Funds ................................................................. 16
Donor Advised Funds ................................................................................................... 18
Scholarship Funds ....................................................................................................... 21
Designated Funds ........................................................................................................ 23
Agency Funds ................................................................................................................ 25

**The Acorn Society: Creating Your Legacy** ............................................................. 27

**Contributors** .......................................................................................................... 28

**Financial Stewardship** .......................................................................................... 32

**Board of Directors** .................................................................................................. 33

**Corporators** ............................................................................................................ 34

**Growing the Good: A Campaign for Greater Worcester** ....................................... 35

**Staff** .......................................................................................................................... 36

---

**On the cover:**

We thank all the participants and organizations pictured on the cover (clock-wise from top left): children in creative play at Tri-Community YMCA; students participating in Peer Mediation through the Center for Nonviolent Solutions at Claremont Academy; a senior with Meals on Wheels driver from Elder Services of Worcester Area; and a musician with the Worcester Youth Orchestras.

These are our neighbors. In their faces, you see the vitality and variety that make our community such an appealing place to live, work and raise a family.

“Growing the Good” is also the name of our initiative to raise more capital for community grants: *Growing the Good: A Campaign for Greater Worcester.*
The group of business and community leaders who established this Foundation more than 40 years ago believed that we all have a role in community betterment. The model of philanthropy has proven its power. Our staff, board members, donors, and volunteers engage all sectors, listening, learning and taking informed action. Over time, the Foundation has built significant leadership capital: long-standing relationships, deep knowledge of the region’s strengths and challenges, and through our donors’ generosity, a substantial grantmaking engine, its endowment.

These resources enable us to achieve ever-greater impact. The Foundation’s Early Childhood Initiative is working across sectors to create conditions conducive to raising healthy and resilient children. Our Creative Worcester initiative will advance practices in arts organizations that engage and reflect diversity, and develop Worcester as a city in which artists thrive and creativity uplifts all sectors.

More than ever, the Foundation’s commitment to growing the good in our community matters. Safety net services are under threat, children face empty pantries at home, and degrading public discourse, anti-immigration policies, and ICE raids are hurting families. Worcester has long welcomed and benefited from immigrants, and 55 percent of its public school students speak another language at home. Here, we help one another—most recently taking in evacuees from island neighbors devastated by hurricanes. That’s who we are.

We’re proud to be your community foundation. We’re here to serve all who desire to grow the good in this community. Thank you for joining us. Together, we’re doing far more than we could on our own.

Ann T. Lisi
President and CEO

Gerald M. Gates
Chair
2017 HIGHLIGHTS

EARLY CHILDHOOD INITIATIVE

The Foundation’s Early Childhood Initiative seeks to ensure that all children in our community gain a sound start during their formative first years. The Foundation is engaging the entire community in this endeavor, which will yield far-reaching benefits. In 2017, its Early Childhood Committee led public education sessions with child development experts, including local educators; and advocated for expanded funding of early childhood education. Total funding to early childhood grants was $715,000.

The Foundation invested in programs that:

- Support families as primary nurturers and teachers
- Improve the quality and availability of early childhood education and care
- Reduce summer learning loss

In 2018, while continuing advocacy, education, and grantmaking, the Foundation will pilot a model to coordinate services to children and families, and take part in creating a community-wide data dashboard to track child wellness.
CREATIVE WORCESTER
The arts have the power to bring us together, enabling all to find a place and voice. Creative Worcester is a new initiative of the Foundation to advance our arts and cultural resources as catalysts of vitality, civic engagement and creativity.

We are one of five community foundations selected by the Barr Foundation to take part in its Creative Commonwealth Initiative. Each partner receives a two-year, $500,000 grant along with expert guidance as, learning together, we strengthen and expand the arts and creative sectors within our communities.

With Creative Worcester, our program as a partner in the Creative Commonwealth Initiative, the Foundation will encourage new practices and programming within our arts organizations that engage and reflect our diverse populations. We will work to develop Worcester as a city in which artists and innovators thrive and invigorate all sectors of the community.

GROWING the GOOD, TOGETHER
Each year, the Foundation makes community grants from its discretionary and field of interest funds to nonprofits working to achieve these goals for our region:

- All children gain a strong start during their first years
- Quality, comprehensive health care is available to all
- At-risk youth gain opportunities to succeed in school and life
- Economic and housing security is within reach of all
- Our civic, cultural and natural resources engage all in our diverse community

Many donors also target these goals through their donor advised funds. Meet some of our 2017 grantees in the stories that follow.

EARLY CHILDHOOD DEVELOPMENT: Nurturing Children by Strengthening Parents .................. 4

HEALTH: Increasing Access to Life-Enhancing Care ...................... 6

YOUTH DEVELOPMENT: Encouraging Achievement and Growth ......................... 8

THE ARTS AND CIVIC LIFE: Fostering Creative Connections of All Kinds ............ 10

NOTABLE MILESTONES IN 2017

- Foundation investments increased the endowment by 15.3%, the highest annual investment earnings since 2009.
- The Foundation’s Nonprofit Support Center, the region’s premier learning resource for nonprofit board and staff, introduced a highly popular series on building racial equity into organizations.
- Dedicated to improving health in the region, the Fairlawn Foundation has made mental health its priority, awarding $342,000 to innovative, evidence-based mental health programs.
In 2017, the Foundation added new grantees to extend the reach of quality childcare in our region and also continued investing in proven programs, which used our support to expand their highly effective services.

Two Southbridge-based programs, the Kennedy-Donovan Center and the Tri-Community YMCA, serve a low-income population that includes many high-risk families referred by the Department of Children and Families. Foundation grants enabled these organizations to enhance their services with evidence-based programs that develop the competence and confidence of parents as their children’s primary nurturers and educators.

One evening a month, about 20 families dine together at the Tri-Community YMCA. Families and staff mingle over supper and then after dessert, children join childcare groups while their parents take part in the Y’s Parents’ Café, an informal give-and-take about parenting issues.

“By offering dinner and childcare free of charge, we make coming here easier for working parents,” says Social Services Coordinator Cathy Keefe. The Café along with the Y’s other “Strengthening Families” programs help parents become more resilient, learn more about child development, and build a social and support network.

Parents attend monthly talks by experts on such topics as forming attachments, healthy play, and encouraging positive behavior. A new seven-week class, Positive Solutions for Families, includes take-home educational materials for both parents and children.

“With our Foundation grant, we’re empowering parents,” says Cathy. “Learning together, they’re improving their lives and the lives of their children.”

Foundation grants have also enabled Kennedy-Donovan Center to develop a robust early intervention program. Entitled Fostering Early Connections, the program serves parents of children from the prenatal stage through age three who are experiencing or at risk of developmental delays.

“Many parents who have coped with substance abuse and domestic violence gain new strengths and learn to better understand and meet their children’s complex needs,” says President and CEO Aubrey Macfarlane.

Yet distressed parents are often wary of treatment. The Center researched and adopted an array of proven tools that engage and educate parents and help them move beyond fear to trust. These resources include mindfulness techniques to reduce stress; the Systematic Training for Effective Parenting (STEP) program; and “It Takes Two to Talk,” for parents of children with language delays. Also through the grant, the Center added physical, speech and occupational therapists.

“At first, only 57 percent of our high-risk families completed intake,” says Aubrey. “Now, 72 percent remain in treatment. All 800 of the families we serve benefit from these enhancements.”
The Foundation works to advance the Greater Worcester Community Health Improvement Plan (CHIP) and its goal—that all in our region can access the health care they need, when and where they need it.

Grantees include Worcester Addresses Childhood Trauma (ACT), which provides prompt, trauma-informed intervention to children under age 12 who experience violence as either victims or witnesses. Research indicates that rapid, effective response can limit long-term effects of trauma on children.

Worcester ACTs devised an evidence-based, collaborative protocol for incidents involving young children. The Worcester Police Department flags such incidents, alerting members of the YWCA Central Massachusetts Worcester Intervention Network (WIN) team. The WIN team triage these calls and dispatch trained and certified community health workers within 72 hours.

“This intervention includes skill building to increase an affected family’s community connectedness and resilience,” says Laurie Ross, associate professor of community development at Clark University, one of eight institutions on ACT’s founding team. “Solid evidence shows that intervening early can heal children and help families reduce the impact of trauma.”

Community Healthlink, a health care provider within UMass Memorial Healthcare, successfully incorporated primary care into its mental health clinic for adults. Now, Healthlink’s Families and Communities Together unit is extending this model to children and families.

By integrating pediatric care within behavioral treatment of children with severe emotional disorders, this Foundation-funded program is improving both the physical and emotional health of young patients and their families.

“People afflicted by mental illness die sooner,” says Nicole Gagne, president and CEO of Community Healthlink. “We educate families in healthy habits that enhance and lengthen their lives.”

Treatment emphasizes nutrition, exercise, and early diagnosis of medical problems. “We promote realistic lifestyle changes,” says Nicole, “such as how to select and prepare tasty, healthy foods. We’re reaching more than 300 families.”

Elder Services of Worcester Area (ESWA) provides 1,300 homebound seniors with nourishing daily meals through its Meals on Wheels program and also serves lunch to 300 guests at local senior centers.

“Many seniors on fixed incomes find it difficult to purchase enough food to stay healthy,” says ESWA Executive Director Maureen Siergie. “Our nutritionists plan meals that go a long way toward stabilizing chronic health conditions.”

Drivers also provide a vital human touch. “They know the people on their routes,” says Maureen. “They check on how they are doing and connect them with other ESWA services that enable elders to live safely in their homes. Foundation grants help us serve our growing and increasingly diverse population of seniors.”

Nourishing meals are just part of the care offered by Elder Services of Worcester Area, which also provides vital human connections and services that help seniors live well in their homes.
The Foundation invests in programs that enable young people to discover and develop their potential—from gaining first-time work experience to growing leadership skills.

About 300 low-income youth obtain summer jobs through YouthWorks, a program of Worcester Community Action Council, which also runs a yearlong career readiness program.

“More than 2,000 eligible young people apply,” says Executive Director Jill C. Dagilis. “We’re striving to increase work opportunities for youth. Our relationship with the Foundation helps us broaden these partnerships.”

A Foundation grant enabled YouthWorks to expand its yearlong program, which matches participants’ strengths with needs in local industries, such as distribution and health care, and provides training and work experience that lead to permanent employment. “It’s a robust, proven model tailored to our community,” says Jill.

YouthWorks has a strong ally in Worcester Interfaith’s Youth Jobs Initiative, a grantee that advocates for more state and local funding of these programs. “Low-income Worcester youth are eager for employment,” says Coordinator Frank Kartheiser, who led a 150-strong contingent of young people to a State House meeting with elected officials. “We’re also pursuing private-public partnerships to make both youth job programs a steppingstone into careers.”

Youth also gain skills as volunteers, and while serving others, take on meaningful leadership roles.

Trained in peer mediation by the Center for Nonviolent Solutions, a group of students at Claremont Academy helps classmates to resolve disputes using negotiation skills. Guidance counselors refer students to the mediators, who also hold informal Q&A sessions. Monthly lectures on conflict resolution are open to the entire school.

“These students are curbing suspension rates,” says the center’s Executive Director, Hasnaa Mokhtar, “and spreading a school-wide culture of constructive conflict resolution and mutual respect.”

Teen volunteers are important members of the team at Angels-Net Foundation, which helps immigrant and refugee families adapt and contribute to their new community. “Our teen leaders are role models to younger newcomers who are learning to interact with others and take part in activities,” says Maggie Johnson, founding executive director, and a Liberian refugee.

Mentored by staff, the teenagers guide children in after-school activities and assist teachers in the nonprofit’s program to reduce summer learning loss. They also participate in a new, 10-week youth leadership course funded by Youth For Community Improvement (YCI), the Foundation’s teen grantmaking committee.

Now in its eighteenth year, YCI offers high school students a unique leadership development experience as they collaborate to set goals, invite proposals and select grantees. In 2017, 20 YCI participants from 15 schools awarded 13 grants totaling $24,500.

Trained in peer mediation by the Center for Nonviolent Solutions, students at Claremont Academy coach their classmates in using negotiation skills to resolve disputes.
FOSTERING CREATIVE CONNECTIONS of ALL KINDS

Our cultural and civic resources can bring us together in our diversity. The Foundation invests in developing the power of these shared assets to engage and reflect the many voices in our community.

**ArtsWorcester** is a go-to resource for local visual artists, from beginners to those with established practices. Executive Director Juliet Feibel, PhD, says, “Advancing artists is at the heart of all we do.”

Serving more than 200 members, the nonprofit runs a year-round calendar of juried group shows and solo exhibitions, and offers prizes, grants, and critiques as well as workshops on business skills. ArtsWorcester nurtures future artists with such events as its College Show, which presents works from seven area colleges, and Teen Nights, which draw students from all over the city. Free to all, its galleries present quality artwork that is within reach of many budgets.

Juliet says, “Foundation grants and Nonprofit Support Center training help us grow as the place that anchors artists in this city.”

About 70 percent of Greater Worcester’s 5,000 legally blind residents depend on **Audio Journal**, which for 30 years has provided 24/7 programming that connects listeners to local news, events, and services. Its three staff and 170 volunteers read aloud from 29 publications, including the daily newspaper. Audiences listen on special-purpose radios or access programs via the Internet, cable TV or phone.

“As our population ages, our audience is growing,” says Vincent Lombardi, director. “Our Foundation grant helps us serve long-time and new listeners. We’ve added a book reading group, cultural calendar, and shopper’s guides in response to listeners.”

Every year, **Worcester Youth Orchestras** (WYO) engages more than 200 young musicians from second to twelfth grade in the rigors and rewards of ensemble performance.

Whether practicing for a nursing home recital or rehearsing Beethoven’s “Ode to Joy” for a concert in Mechanics Hall, WYO musicians work together to achieve excellence. “They hold each other to high standards and grow in both interpersonal skills and musicianship,” says Artistic and Executive Director Jonathan Brennand.

“WYO develops young musicians, and also prepares young adults who are a positive presence in society. We use music to break down barriers and dispel prejudices. Our students learn that the arts are a crucial part of life and offer all an opportunity to thrive.

“Foundation support for scholarships enables us to serve families of any income level. From carpooling to financial aid, we make it work for each child.”

Worcester Youth Orchestras brings together school-age musicians of varied backgrounds, who while learning to excel as members of an ensemble grow as both artists and young adults.
Community Grants support nonprofit organizations that build healthy and vibrant communities in Central Massachusetts and are made possible by the Fairlawn Foundation Fund, Fallon/OrNda Community Health Fund, and Discretionary and Field of Interest funds.

CIVIC LIFE, THE ARTS, AND ENVIRONMENT

ArtsWorcester, Aurora Gallery Programs $10,000
Audio Journal, Operating Support $5,000
Community Harvest Project, Volunteer Farming Program $15,000
Discovery Museums, Discovery Science Worcester $5,000
EcoTarium, EBT Access Program $10,000
Greater Worcester Land Trust, Operating Support $7,000
Joy of Music Program, Financial Aid Program $10,000
Massachusetts Audubon Society, Nature Education for Worcester Youth $18,000
Music Worcester, In Harmony: Music Worcester Comes to Worcester $10,000
Pakachoag Music School of Greater Worcester, Financial Aid Program $4,000
Preservation Worcester, Operating Support $9,000
Tower Hill Botanic Garden, Worcester Refugee Assistance Project Partnership Program $5,000
VSA Massachusetts, Open Door Gallery at Worcester Art Museum $5,000
WCUW Community Radio, Voices of Worcester $10,000
Worcester Center for Crafts, Youth Craft + Creativity $5,000
Worcester Center for Performing Arts, Adopt-a-School - WPS Partnership $5,000
Worcester Chamber Music Society, Operating Support $10,000

Worcester Cultural Coalition, Creativity Sparks Community $15,000
Worcester Regional Research Bureau, Operating Support $6,000
Worcester Youth Orchestras, Scholarship Program $5,000
YWCA of Central Massachusetts, Racial Equity Program $7,500
CIVIC LIFE, THE ARTS, AND ENVIRONMENT: $176,500

EARLY CHILDHOOD DEVELOPMENT

Apple Tree Arts, Head Start Preschool Music Outreach Program $15,000
Bancroft School, Worcester Partnership with Elm Park Community School $20,000
CASA Project, Child Court Advocacy $25,000
CASA Project, Mental Health Services $100,000
Center for Health Impact, Intercultural Communication for the Wellbeing of Children $15,000
Community Builders, Catch the Reading Bug at Plumley Village $25,000
Community Healthlink, Together For Kids $12,000
Ecotarium, 2017 Countdown to Kindergarten $7,500
Edward Street Child Services, Early Childhood Matters Initiative $20,000
Edward Street Child Services, Master Teacher Consultation Program $55,000
Family Health Center of Worcester, Baby Café $15,000
Family Health Center of Worcester, Centering Pregnancy $10,000
Guild of St. Agnes of Worcester, Teacher Education $15,000
HOPE Coalition, Worcester ACTs – Addressing Childhood Trauma $130,000
Horizons for Homeless Children, Central Region Playspace Program $8,000
House of Peace and Education, HOPE for Kids – Pals Program $10,000
Jewish Family & Childrens Service, School Consultation Program $10,000
Kennedy-Donovan Center, Fostering Early Connections $12,000
Latino Education Institute, Family Engagement Across the Ages $25,000
Literacy Volunteers of Greater Worcester, English Language Literacy for Immigrant & Refugee Parents $5,000
Our Father’s House, Ensuring Health & Wellness for Homeless Children $15,000
Pernet Family Health Service, Bridge Between Early Childhood Services and Early Intervention $10,000
Pernet Family Health Service, Early Childhood Development Program $20,000
Pernet Family Health Service, Home Visits for Young Mothers $20,000
Rainbow Child Development Center, Early Education Program $18,000
Reach Out and Read, Worcester Rx for Success! $5,000
Tri-Community YMCA, Strengthening Families $10,000
United Way of Central MA, Summer Learning Collaborative $60,000

Worcester Comprehensive Education & Care, Teen Parent Support Program $7,500
Worcester Jewish Community Center, Scholarship Childcare Programs $10,000
Worcester Public Library Foundation, Summer Reading Program $5,000

EARLY CHILDHOOD DEVELOPMENT: $715,000

ECONOMIC SECURITY

Abby’s House, Shelter, Housing & Advocacy Operations $18,000
African Community Education Program, Family Outreach & Education Programming $21,000
American Red Cross, Disaster Relief & Recovery Program $9,000
Ascentria Community Services, Immigration & Legal Assistance Program $25,000
Bridge of Central MA, South County Housing Assistance Program $12,500
Catholic Charities Worcester County, Citizenship Services for Families $12,000
Catholic Charities Worcester County, Emergency Pantry Program $12,500
Center of Hope Foundation, Employment Services Support $7,500
Central Massachusetts Housing Alliance, Public Education & Advocacy $12,000
Community Legal Aid, Immigrant Victims Legal Advocacy Project $15,000
Ex-Prisoners and Prisoners Organizing for Community Advancement, Putting UNITY Back into CommUNITY $5,000
Family Health Center of Worcester, Healthcare for Homeless Families $20,000
Fresh Start Furniture Bank, Furniture Distribution Center $5,000
Friendly House, Frances Perkins Transitional Program $21,000
Friends of St Luke’s, St. Luke’s Guesthouse $7,500
Friends of the Shrewsbury Public Library, English Conversation Circle $5,000
Habitat for Humanity MetroWest/Greater Worcester, Program Support $7,500
Interfaith Hospitality Network of Greater Worcester, Program Support $10,000
LGBT Asylum Support Task Force, Operating Support $5,000
Literacy Volunteers of Greater Worcester, Support for Adult Immigrant & Refugee Job Seekers $20,000
Literacy Volunteers of the Tri-Community, ESOL Tutoring Programs $7,500
Matthew 25, Mt. Pleasant Street Housing Initiative $7,500
NewVue Communities, North of Main Neighborhood Initiative $20,000
Notre Dame Health Care, Educational Bridge Center $5,000
Oak Hill CDC, Operating Support for Neighborhood Development $10,000
Refugee and Immigrant Assistance Center, Comprehensive Case Management $10,000
Refugee and Immigrant Assistance Center, ESOL System Navigator $10,000
Regional Environmental Council, General Operations $20,000
GRANT HIGHLIGHTS continued

Salvation Army - Worcester Citadel Corps, Sally’s Place $7,500
South Middlesex Opportunity Council, Greater Worcester Housing Connection $15,000
Spanish American Center, Nos Estamos Ayudando/Helping Ourselves $6,000
StandUp For Kids - Worcester, Operating Support $5,000
Veterans Inc., Supportive Services for Veterans and Families $12,500
Visitation House, Outreach Coordinator $5,000
Worcester Anti-Foreclosure Team, Program Support $7,500
Worcester Community Ground, Community Building & Affordable Housing $10,000
Worcester Community Housing Resources, Quality Housing in Liveable Neighborhoods $10,000
Worcester County Food Bank, Food Sourcing & Distribution $5,000

ECONOMIC SECURITY: $424,000

HEALTHY COMMUNITIES

Advocates, Worcester Initiative for Supported Reentry $5,000
Alzheimer’s Association, MA/NH Chapter, Expansion of Alzheimer’s Care & Support $5,000
Asian Task Force Against Domestic Violence, Worcester Intervention Program $5,000
CENTRO, Community Based Services $5,000
Children’s Friend, Community Outreach Project for the Carriage House $5,000
Children’s Friend, Mental Health Services for LGBT Youth/Families $10,000
Community Healthlink, Integrating Wellness into Behavioral Health Services $50,000
Community Servings, Nutrition Program for Critically Ill People $9,000
Dismas House of Central Massachusetts, Clinical Support Services $5,000
Dismas House of Central Massachusetts, Prisoner Reentry Program $15,000
Edward M. Kennedy Community Health Center, Substance Abuse Assessment & Intervention $17,500
Elder Services of Worcester Area, Nutrition Program $7,500
Family Health Center of Worcester, Dental Care for Low-Income Adults & Children $25,000
Family Health Center of Worcester, Healthcare for Homeless Families $10,000
Genesis Club, Educational Supports & Young Adults Initiative $20,000
Genesis Club, Health and Wellness Program $5,000
Growing Places Garden Project, Growing Healthy People & Community $4,000
Jeremiah’s Inn, Nutrition Programs $7,500
Massachusetts College of Pharmacy and Health Sciences, Worcester Campus: Dental Hygiene Community Ambassador Program $7,500
NEADS (National Education for Assistance Dog Service), Service Dog Training $9,500
New Hope, MJ Ledenham Center for Family Intervention $10,000
North Quabbin Citizen Advocacy, Operating Support $7,000
Parent/Professional Advocacy League, Strengthening Family Voice $5,000
Pathways for Change, Medical Accompaniment $7,000
Pathways for Change, Sexual Assault Prevention & Survivor Services $10,000
Planned Parenthood League of Massachusetts, Central MA Health Education Programs $12,500
Rachel’s Table, Program Support $12,000
Reliant Medical Group Foundation, Transportation Program $4,000
Southeast Asian Coalition of Central Massachusetts, Building Healthy Communities $25,000
Southeast Asian Coalition of Central Massachusetts, Healthcare Access Program $15,000
Tri-Valley, Inc., Nutrition Programs for Senior Citizens $10,000
YWCA of Central Massachusetts, Domestic Violence Services $20,000

HEALTHY COMMUNITIES: $365,000

YOUTH DEVELOPMENT AND EDUCATION

African Community Education Program, Youth Academic & Support Programs $24,000
Angels Net Foundation, Educational & Social Programs for Immigrant & Refugee Youth $5,000
Appalachian Mountain Club, Youth Opportunities Program - Worcester Summit Site $5,000
Auburn Youth & Family Services, Operating Support $10,000
Barton Center for Diabetes Education, Campership Program $5,000
Best Buddies Massachusetts, School Friendship Programs in Worcester $4,000
Big Brothers Big Sisters of Central MA/MetroWest, Worcester County Mentoring Program $20,000
Blackstone Valley Boys and Girls Club, Summer Program Camperships $7,500
Bottom Line, Worcester Access Programs $10,000
Boys & Girls Club of Webster - Dudley, Junior Staff Development Program $7,000
Boys & Girls Club of Worcester, Program Support $25,000
Bridge of Central MA, Safe Homes $18,000
Camp Putnam, Camp Scholarships for Worcester Children $10,000
CASA Project, Transitional Age Youth Bridge Program $7,500
Center for Nonviolent Solutions, Peer Mediation & Peacebuilding Program $5,000
Children’s Friend, Outreach and Support Services $50,000
Clark University, Main South College Success Program $10,000
Family Health Center of Worcester, Positive Directions Summer Jump Start $7,500
Genesis Club, Young Adults Transitions Project $57,415
Girl Scouts of Central and Western Massachusetts, It’s A Girl’s World $7,500
Girls Incorporated of Worcester, Eureka! $6,500
Girls Incorporated of Worcester, Operating Support $17,500
Girls Incorporated of Worcester, Promoting Healthy Lifestyles $6,500
HOPE Coalition, Mental Health Model $15,000
HOPE Coalition, Peer Leadership Program $12,500
Latino Education Institute, ENLACE – Encouraging Latinos to Achieve Excellence $12,000
Let’s Get Ready, Worcester College Access Program $10,000
LUK Crisis Center, Mentoring Program $5,000
Massachusetts Center for Nonviolence, Career Opportunities, Collegiate Success Institute $10,000
Massachusetts Education & Career Opportunities, On Our Way $12,500
Montachusett Opportunity Council, Homework Help Center at Green Acres $8,000
Nativity School of Worcester, Graduate Support Program $7,500
North Brookfield Youth Center, Youth Programs $10,000
Quinsigamond Community College Foundation, Brothers & Keepers Summer Bridge Academy $5,000
Quinsigamond Community College Foundation, Women in Technology Program $15,000
Regatta Point Community Sailing, Youth Scholarships $5,000
Rise Above Foundation, Activities for Foster Youth $5,000
Straight Ahead Ministries, Youth Re-entry Project & Straight2Work Program $15,000
Tenacity, Summer Tennis & Reading Program $7,500
Valley Residents for Improvement, Lakeside Summer Camp $18,000
Whitin Community Center, Youth Outreach Programs $10,000
Worcester Academy, Summer Scholars Program $5,000
Worcester Community Action Council, YouthWorks – Year-Round Program $10,000
Worcester Education Collaborative, Operating Support $12,500
Worcester Interfaith, Summer Jobs for Youth $10,000
Worcester Public Schools, Youth Leadership through Philanthropy at South High $12,000
Worcester Youth Center, Program Support $15,000
Worcester Youth Center, Safe and Successful Youth $20,000
YMCA of Central Massachusetts, Minority Achievers Program $10,000
YMCA of Central Massachusetts, Summer PLAY $11,000
YouthConnect, Summer Programs $18,000
Y.O.U. Inc., Dynamo Youth Academy $10,000
Y.O.U. Inc., Pregnant and Parenting Teen/Voices with Choices Program $18,000
YWCA of Central Massachusetts, Girls CHOICE $10,000

YOUTH DEVELOPMENT AND EDUCATION: $670,415
Named FUNDS

Individuals, families, and organizations entrust the Foundation to manage their charitable giving through named funds. Below is a listing of all named funds sorted by fund type with the year created in parentheses.

DISCRETIONARY & FIELD OF INTEREST FUNDS RESPOND TO PRESSING COMMUNITY NEEDS.

Ruth and John Adam Fund (2000)
George I. Alden Education Fund (2010)
Lois Anne Memorial Fund (1993)
Isabel K. Arms Fund (2015)
Fund for the Arts and Humanities (1993)
Nils Bjork Memorial Fund (1992)
Robert W. Booth Fund in Memory of George F. Booth (1988)
Robert S. and Helen A. Bowditch Fund (1990)
Central Massachusetts Health Standards Fund (1990)

Brian M. and Maureen E. Chandley Fund (2017) NEW

Child Wellness Fund (2001)
Community Ministries Fund (2006)
Community Response Fund (2010)
Dr. Harold M. Constantian Fund (1997)
Lorraine Crepeau Fund (2006)
Robert and Mary S. Cushman Fund (1978)
Richard C. Daniels Fund (2001)
Anna S. and Warren G. Davis Fund (1998)
Jean B. and Gilbert S. Davis Fund (1994)
Rosemary Davis Environmental Preservation Fund (2001)
Directors and Corporators Community Impact Fund (2007)
Eliza D. and Cora J. D. Dodge Fund (1985)
EMC Community Fund (2000)
Environmental Grantmaking Fund (2002)
Fairlawn Foundation Fund (1991)
Fallon/OrNda Community Health Fund (1996)
Marion Stoddard Fletcher Fund (1992)
Warner S. and Mary F. Fletcher Discretionary Fund (2017) NEW
Founders Fund (1983)
Samuel Frank Charitable Fund (1993)
Esther and Howard G. Freeman Fund (1984)
Garfield Berry Fund (1998)
Ragnhild L. Gersdorf Fund (1994)
GLBT Endowment Fund (2010)
Haskell and Ina Gordon Fund (1980)
Margaret A. and Ralph H. Gowetz Fund (1990)
Greater Worcester Jaycees Fund (1997)
Nathan and Barbara Greenberg Fund (1982)
Raymond P. Harold Discretionary Fund (1982)
Francis A. and Jacquelyn H. Harrington Human Services Fund (1992)
Orville Harrold Fund (2006)
Harriet Miller Hight Education Fund with the Association of Colored Peoples (1982)
Dr. Leon, Arax and Sona Husisian Fund (2016)
Jeppson Memorial Community Fund (1976)
Dan R. and F. Ann Lewis Charitable Fund (2017) NEW
Lund Pioneer Fund (2010)
Main South Fund (1999)
Frances F. Mansfield Discretionary Fund (1996)
Barbara S. Massey Fund (2000)
Organization Assistance Fund (1996)
Partnership Fund (1990)
Marlene and David Persky Fund (1997)
Quota International of Worcester Fund (1998)
Melvin and Martha Rosenblatt Fund (1985)
Carol L. Seager Fund (2014)
Seven Hills Youth Fund (1995)
Norman L. and Dorothy A. Sharfman Fund (2004)
Sumner Lee Sharfman Fund (1984)
Shepherd Knapp School Fund (1979)
Evelyn and Sumner Silver Fund (2007)
H. Arthur Smith Funds (1986)
Isaac Southgate Fund For Leicester (2010)
Spag’s Supply Fund (1986)
Harry G. Stoddard Fund (1992)

Brian M. and Maureen E. Chandley Fund

Newly retired, Brian and Maureen Chandley wanted to create a philanthropic legacy now and for the future. They decided to establish a fund with the Foundation, where Brian has volunteered for more than a decade. A board member since 2007, Brian also for six years chaired the Foundation’s Distribution Committee, a group of community leaders who review grant proposals and recommend grantees.

“Maureen and I enjoy contributing to charities we care about as volunteers and donors,” says Brian. “At the same time, we wanted to bring a strategic focus to our charitable investments. This fund enables us to meet this goal now and in perpetuity.”

The couple created a discretionary fund, which lets the Foundation—through its Distribution Committee—determine the best use of its grants.

“This citizen-run grantmaking process is unbiased and effective, with impact that is second to none,” says Brian. “Community grants provide both new and proven nonprofits with sustainable, reliable support.”

Warner S. and Mary F. Fletcher Discretionary Fund

Long-serving Foundation corporators Mary and Warner Fletcher recently created this fund, becoming the third generation of the Fletcher family to hold a named fund with the Foundation.

“Our community foundation is unrivaled as a vehicle for charitable giving that will remain flexible, efficient, and effective in perpetuity,” says Warner, a Foundation board member and an estate-planning attorney.

Noting that the Foundation enables families and individuals with varied means to create their own endowed funds, Warner says, “We value the strong stewardship of the Foundation, which prudently manages donors’ funds and administers grants according to donors’ wishes.”

With their discretionary fund, Mary and Warner entrust grantmaking decisions to the Foundation. “The Foundation’s Distribution Committee are citizen leaders chosen for their understanding of this community,” says Warner. “They will always be current with our region’s needs, which may differ 10 or 20 years from now. And they will know which nonprofits are the best grantees to meet those needs.”
Dan R. and F. Ann Lewis Charitable Fund

Newlyweds in 1968, Dan and Ann Lewis confronted a real-world crisis. “We were evicted,” says Ann. “Someone had bought our building. We were just out of college, without much money. We saw that homelessness could happen to anyone.”

The couple coped by making judicious use of a gift from Dan’s father—a can of coins; but they never forgot this lesson during better times. Ann held positions in local colleges. While working as a technical writer, Dan became an accomplished poet and received both the 2012 Frank O’Hara Prize and 2016 Stanley Kunitz Medal of the Worcester County Poetry Association.

Both volunteered with the Interfaith Hospitality Network of Greater Worcester. “Now, it’s even harder to get by,” says Ann. “We managed to do OK. We wanted to help people on the edge.”

For eight years, Dan outlived his poor cancer prognosis. In January, six months before Dan died, the couple created this fund. “Many agencies serve the hungry and homeless,” says Ann. “Through the Foundation, our support will always reach those with greatest need.”

“… no conceivable way that I can ever again be a me without being an us.” — Dan Lewis, “For Ann,” June 4, 1999

Gilbert H. Sundberg Fund (1987)  
D. Russell and Atsye S. Taft Fund (1992)  
Corinne Charron Turner Fund (1986)  
Mr. and Mrs. Robert H. Wetzel Fund (1983)  
Robert J. and Anne C. Whipple Fund (1997)  
Irving N. and Annabel Wolfson Fund (1998)  
Worcester County Deputy Sheriffs Association Fund (1999)  
Worcester Credit Bureau Fund (1992)  
Youth Opportunity Fund (1981)

DONOR ADVISED FUNDS ALLOW DONORS TO SUGGEST GRANTS AT THEIR CONVENIENCE.

Rosalind Lee and Victor Ambros Fund (2014)  
Elkanah B. Atkinson Community and Education Fund (1986)  
Auburn Foundation (2002)  
Bartholomew & Company Anniversary Fund (2014)  
Jane Bath Fund (2007)  
Belanger Family Fund (2013)  
JoAnn Waite Bennett Memorial Fund (2010)  
Bowditch & Dewey Fund (1990)  
Bozenhard Charitable Fund (2005)  
James C. and Glenna A. Brunner Memorial Fund (2011)  
James R. Buonomo and Paula Rowse Buonomo Fund (2013)  
George S. and Tammy Butler Fund (2007)  
Marcia Butzel Fund (2001)  
John J. and Elaine C. Cahill Family Fund (2012)  
Clearbrook Fund (2015)  
Maureen Logan Coghlin Fund (2001)  
Herbert B. and Jayne Cohan Fund (2000)  
Dr. James J. Convery and Tracy A. Craig Fund (2009)  
Elizabeth A. Culhane Memorial Fund (2000)  
Jeanne Remillard Curtis Fund (1999)  
Geoffrey Dancey and Rashida Garcia-Dancey Family Fund (2014)  
Rosemary Davis Memorial Fund (2000)  
Dana L. DeAngelis-McDonald Memorial Fund (2002)  
Gene J. DeFeudis Fund (2005)  
Carolyn Knight Dik Fund (1998)  
Ross and Lisa Dik Fund (1993)  
Kevin Dully Memorial Fund (2015)  
Lillian Knowles Eldred Fund of Pakachoag Church for the Support of Sacred Music (1999)  
Lucille Alma Flynn Fund (2016)
Descendants of Lucille and Richard Fontaine Family Fund (2017) NEW
Fontaine Fund (2003)
Francis A. Ford and Shirley A. Doyle Fund (2011)
John V. Frank Fund for Pomfret Area (2011)
Friends of Learning in Killingly Fund (1998)
Gerald and Patricia Gates Fund (2017) NEW
Barbara H. Gaudette Fund (2007)
Lillian R. Goodman and Mary K. Alexander Fund for Nursing Education and Research (1999)
David R. and Rosalie A. Grenon Fund (1986)
Mary B. Grogan Fund for Youth (2001)
Robby Guyott Memorial Fund (2013)
Newell and Betty Hale Fund (2001)
Raymond P. Harold Memorial Fund (1982)
Harris Family Fund (2001)
Herlihy Family Memorial Fund (2017) NEW
Frances M. Herron Fund (1997)
J and J Fund (2014)
Arthur H. and Elizabeth A. Jay Fund (2017) NEW
Jeppson Memorial Fund for Brookfield (1976)
Shirley S. Kane Family Fund (2014)
Keamy Fund (2014)
William and Maureen Kelleher Charitable Fund (2008)
Kirby Foundation Fund (2007)
Augusta H. Kressler, M.D. Fund (2002)
George and Anna Krikorian Family Fund (1994)
LaVigne Family Fund (1992)
Leicester Savings Bank Fund (1997)
Peter H. and Catherine H. Levine Fund (2007)

Descendants of Lucille and Richard Fontaine Family Fund

Dick and Debra Fontaine have created this donor advised fund to honor Dick’s parents, Richard and Lucille Fontaine. Richard (1918-1998) and Lucille (1918-1992) shared three priorities: family, education and community. This fund extends these values to their descendants.

Stable family life almost eluded Richard and his seven siblings, who were orphaned during the Depression. “The oldest siblings raised the younger ones,” says Dick. “They worked in the textile mill and pooled resources to stay together as a family.”

In 1998, Dick and his siblings created a scholarship named for their parents that benefits graduates of Norwich Free Academy, a school in their hometown, Taftville, CT.

This new donor advised fund will engage three generations of Richard and Lucille’s family. Looking forward to family-wide, collaborative grantmaking, their granddaughter Jaimee devised a web site for the fund with her cousin Nick. “We are honoring the values instilled in us by our family,” says Nick, “starting with our grandparents.”

Gerald and Patricia Gates Fund

Patty and Gerry Gates created a donor advised fund and look forward to this new approach to their charitable giving.

Gerry chairs the board of the Foundation and previously headed its Distribution Committee, which reviews applications for community grants and recommends grantees.

“Volunteering with the Foundation has opened my eyes to the needs in our region and the many organizations working to address these needs—often with very limited resources,” says Gerry. “With our fund, we can explore and support causes that matter to us individually and as a family.”

“We’ve contributed to certain nonprofits all long,” says Patty. “Our fund gives us a better way to do this. The Foundation administers and invests the fund, growing its grantmaking power. And to make a grant, we simply contact the Foundation, which does the rest.”

“This is a new and rewarding venture for us,” concludes Gerry. “I encourage others to create a fund when it’s the right time in their lives.”
**Herlihy Family Memorial Fund**

With their donor advised fund, Jim Herlihy and his siblings honor their late father, Jay Herlihy, on the fifth anniversary of his death.

Jim and his siblings are the third generation to run the family business, Herlihy Insurance Group. “Our dad, Jay Herlihy, was a very good businessman,” says Jim. “Over the years we have learned how much our dad did behind the scenes to help others. We want to emulate his example. “We all agreed that an endowed fund to help others would be a great tribute to our father. Our parents instilled in us the values of working hard to be successful and to assist those less fortunate as much as we can.”

Team Herlihy, the agency’s community service group, volunteers at projects here and in Haiti. Jim says, “We know that many local nonprofits are in need of funds to provide their important services in our community.”

---

**Arthur H. and Elizabeth A. Jay Fund**

Retirees Art and Elizabeth Jay enjoy volunteering in their hometowns, Brookfield and West Brookfield. “In these small communities, everyone steps up,” says Elizabeth.

With their new donor advised fund, the couple also enjoys providing financial support to causes near their home and beyond. They recently donated a cross trainer to Shriners Hospitals for Children in Springfield through this fund. Elizabeth described the grant-making process as smooth and simple.

“The Foundation makes giving easy,” says Elizabeth. “We recommend grantees and review our activity online. Foundation staff are extremely responsive.”

A West Brookfield native who returned after a 32-year UPS career, Art says, “We both think an endowed fund is a fine way to leave a legacy. With the Foundation, our fund grows through investment management as well as through our contributions. And with our donor advised fund, we’re not locked in. Annually, we will choose grantees based on opportunities in our town, region, and world.”
In 2009, Melanie Davidian, age 49, succumbed to pancreatic cancer, after outlasting her prognosis by a year. “Melanie had a vivacious, enthusiastic spirit,” says her sister, Christyne Davidian. After enduring childhood trauma, Melanie came into her own at South High, where she played basketball and all-star field hockey. She also became an All-State chorister and guitarist. Melanie graduated in 1977 as senior class president, earned a BA from Boston University in 1981 and, a decade later, obtained an MSW from Simmons College. Melanie developed a large, loving circle of friends and colleagues in Burlington, VT, where she was a clinical social worker, samba drummer, sports broadcaster and, for nine years, parks and recreation commissioner.

In Melanie’s honor, two scholarships per year will be awarded to graduates of South High Community School active in sports, performing arts or student government. “Our criteria look beyond grades and SAT scores,” says Christyne. “Melanie shows by her life that other attributes matter to success in college and in life.”
**Leonide J. Lemire VFW Post 6055 Scholarship Fund**

The Leonide J. Lemire VFW Post 6055 created this fund, which will award three scholarships each year to students from the high schools in Charlton, Southbridge and Sturbridge, with preference to descendants of veterans. By creating this scholarship fund the Post has made a lasting legacy for its community.

Founded in 1946 to serve veterans of overseas combat in the tri-town community, the post is named to honor Seaman First Class Leonide Lemire, the first Southbridge casualty in World War II. His battleship, the West Virginia, was bombed during Japan’s attack on Pearl Harbor.

Faithful to the Veterans of Foreign Wars (VFW) tradition of serving veterans as well as their families, the Post has been community minded from the start. They pitched in and turned a former bowling alley into a meeting place for the Post, which at its peak had 500 members. Since 1949, the Post has sponsored an annual July 4th 5K-run, a beloved town event that is second only to the Boston Marathon as the oldest continuously operating road race in the USA.

**Cynthia and Harrison Taylor Scholarship Fund**

The Foundation’s scholarship coordinator from 1988 to 1996, Cynthia Taylor (1927-2016) drew upon her rich career as she helped donors ensure that their scholarships stayed true to their intent.

Cynthia, Connecticut College ’49, had been an editor at Houghton Mifflin and later obtained an MA from Assumption College in religious studies, a subject she taught at Anna Maria College while directing career counseling services.

While raising two children, Cynthia and her husband Harrison (1921-2010) were vigorous civic leaders in Worcester, where they were born and lived throughout their 59-year marriage.

Harrison, Amherst College ’42, served overseas during World War II as a U.S. Army radio intercept technician. After earning his MBA, he joined State Mutual Life Assurance Company, retiring in 1986 as Vice President of Investment Planning.

The Taylors valued life-long learning and growth, and in 1997, they established a bequest to fund this scholarship, which will support adult students pursuing a bachelor’s degree. Through their scholarship, the Taylors will contribute to Worcester in perpetuity.

**Leonide J. Lemire VFW Post 6055 Scholarship Fund**

The Leonide J. Lemire VFW Post 6055 created this fund, which will award three scholarships each year to students from the high schools in Charlton, Southbridge and Sturbridge, with preference to descendants of veterans. By creating this scholarship fund the Post has made a lasting legacy for its community.

Founded in 1946 to serve veterans of overseas combat in the tri-town community, the post is named to honor Seaman First Class Leonide Lemire, the first Southbridge casualty in World War II. His battleship, the West Virginia, was bombed during Japan’s attack on Pearl Harbor.

Faithful to the Veterans of Foreign Wars (VFW) tradition of serving veterans as well as their families, the Post has been community minded from the start. They pitched in and turned a former bowling alley into a meeting place for the Post, which at its peak had 500 members. Since 1949, the Post has sponsored an annual July 4th 5K-run, a beloved town event that is second only to the Boston Marathon as the oldest continuously operating road race in the USA.

**Cynthia and Harrison Taylor Scholarship Fund**

The Foundation’s scholarship coordinator from 1988 to 1996, Cynthia Taylor (1927-2016) drew upon her rich career as she helped donors ensure that their scholarships stayed true to their intent.

Cynthia, Connecticut College ’49, had been an editor at Houghton Mifflin and later obtained an MA from Assumption College in religious studies, a subject she taught at Anna Maria College while directing career counseling services.

While raising two children, Cynthia and her husband Harrison (1921-2010) were vigorous civic leaders in Worcester, where they were born and lived throughout their 59-year marriage.

Harrison, Amherst College ’42, served overseas during World War II as a U.S. Army radio intercept technician. After earning his MBA, he joined State Mutual Life Assurance Company, retiring in 1986 as Vice President of Investment Planning.

The Taylors valued life-long learning and growth, and in 1997, they established a bequest to fund this scholarship, which will support adult students pursuing a bachelor’s degree. Through their scholarship, the Taylors will contribute to Worcester in perpetuity.

**Leonide J. Lemire VFW Post 6055 Scholarship Fund**

The Leonide J. Lemire VFW Post 6055 created this fund, which will award three scholarships each year to students from the high schools in Charlton, Southbridge and Sturbridge, with preference to descendants of veterans. By creating this scholarship fund the Post has made a lasting legacy for its community.

Founded in 1946 to serve veterans of overseas combat in the tri-town community, the post is named to honor Seaman First Class Leonide Lemire, the first Southbridge casualty in World War II. His battleship, the West Virginia, was bombed during Japan’s attack on Pearl Harbor.

Faithful to the Veterans of Foreign Wars (VFW) tradition of serving veterans as well as their families, the Post has been community minded from the start. They pitched in and turned a former bowling alley into a meeting place for the Post, which at its peak had 500 members. Since 1949, the Post has sponsored an annual July 4th 5K-run, a beloved town event that is second only to the Boston Marathon as the oldest continuously operating road race in the USA.

**Cynthia and Harrison Taylor Scholarship Fund**

The Foundation’s scholarship coordinator from 1988 to 1996, Cynthia Taylor (1927-2016) drew upon her rich career as she helped donors ensure that their scholarships stayed true to their intent.

Cynthia, Connecticut College ’49, had been an editor at Houghton Mifflin and later obtained an MA from Assumption College in religious studies, a subject she taught at Anna Maria College while directing career counseling services.

While raising two children, Cynthia and her husband Harrison (1921-2010) were vigorous civic leaders in Worcester, where they were born and lived throughout their 59-year marriage.

Harrison, Amherst College ’42, served overseas during World War II as a U.S. Army radio intercept technician. After earning his MBA, he joined State Mutual Life Assurance Company, retiring in 1986 as Vice President of Investment Planning.

The Taylors valued life-long learning and growth, and in 1997, they established a bequest to fund this scholarship, which will support adult students pursuing a bachelor’s degree. Through their scholarship, the Taylors will contribute to Worcester in perpetuity.
Debbie Anne Johnson Memorial Fund (1993)
Ken and Pat Jones Family Fund (2014)
Jenica Lynn Junnila Memorial Scholarship Fund (2000)
Deborah A. Kaufman Scholarship Fund (1990)
Lawrence M. and Augusta L. Keeler Scholarship Fund (1978)
Bradford J. Kemp Scholarship Fund (2008)
Max H. and Eloise A. Kuhner Scholarship Fund (2009)
Leicester High School Football Alumni Scholarship Fund (2007)
Leicester Samaritan Nursing Association Fund (1996)
Leicester Savings Bank Scholarship (1999)
**Leonide J. Lemire VFW Post 6055 Scholarship Fund** (2017) **NEW**
Mark MacPherson Lightbown Memorial Scholarship Fund (1980)
Lincoln Village Scholarship Fund (2001)
Mary Sahagen Lonstein Scholarship Fund (2014)
Lunenburg Opportunity Fund (1999)
L.W.V.O. Memorial Scholarship Fund (2010)
Lieutenant James F. “Jay” Lyons III Memorial Scholarship Fund (2001)
Frances F. Mansfield Scholarship Fund (1996)
Ben P. Masterman Scholarship Fund (2013)
Anthony E. Mickunas Memorial Scholarship Fund (1987)
Michael Minty Memorial Scholarship Fund (1988)
Patricia Proko Morris Memorial Scholarship Fund (2012)
Constantine Mina and Vasilky Strates Moschos Scholarship Fund (2005)
Anne Carey Murphy Memorial Scholarship Fund (2001)
Nichols Academy Marilyn T. and Gerald Fels Scholarship Fund (2001)
Arnold and Sylvia Nylund Scholarship Fund (2001)
Richard W. Pierce Fund (1985)
Project Aspire Fund (2011)
Barbara Marks Rothschild Arts and Education Scholarship Fund (2004)
Ida and Murray Rotman Scholarship Fund (1985)
Andrew Sala Memorial Scholarship Fund (1998)
Doris Salzer Memorial Scholarship Fund (2012)
Herbert D. Sherwin Memorial Scholarship Fund (2004)
Claudia Simonian Scholarship Fund (2007)
Arthur J. Smith and Dorothy G. Smith Scholarship Fund (2005)
Francine “Doc” Smith Scholarship Fund (2013)
Steelman Expository Writing Scholarship Fund (1999)
Swedish National Federation Fund (2001)
Tahanto Regional High School Scholarship Fund (1997)
Paul E. Tarkiainen Art Award Fund (1995)
**Cynthia and Harrison Taylor Scholarship Fund** (2017) **NEW**
Kathleen Terry Memorial Scholarship Fund (2005)
Robert Thomson Scholarship Fund (2009)
Sumner B. Tilton Memorial Scholarship Fund (1985)
Laurie C. Tinsley Scholarship Fund (2002)
Tobin Family Fund (1999)
Mark W. Tripp Scholarship Fund (2011)
Arno and Roberta E. Wagner Scholarship Fund (2013)
Reginald Washburn Scholarship Fund (1990)
Webster Square Business Association Scholarship Fund (2002)
Leroy Weiner Scholarship Fund (2000)
Paul J. Westberg Memorial Scholarship Fund (2000)
Leonard H. White Scholarship Fund (2011)
Mary Olive Wood Scholarship Fund (1992)
Worcester Latino Coalition Scholarship Fund (1999)
Worcester Swedish Charitable Association Scholarship Fund (2001)
Worcester Woman’s Club Fund (1999)

**DESIGNATED FUNDS** SUPPORT ONE OR MORE ORGANIZATIONS IN PERPETUITY.

Abby’s Empowerment Fund (2009)
Hollis E. and Gwendolyn D. Alden Fund (1977)
Clarence S. Arms Family Fund (1986)
Joan T. Barry Fund for Saint Mary School (2016)
Elizabeth Trumbull Barton Fund (2004)
Edward W. Bettke Scholarship Fund (2007)
Bolton Public Library Endowment Fund (2012)
Barbara Allen Booth Fund (2001)
Bosler Humane Society Fund (1986)
Bruce Breger Memorial Fund for BSA Troop 1 of Northboro (2010)
Brigham Hill Fund (2016)
Dr. and Mrs. Edward Budnitz Fund (1995)
Cancer Care and Research Fund (1991)
Polly C. and Joseph R. Carter Fund (1987)
Richard and Deanna Charves Fund (2011)
Chesson Family Fund (1991)
Charles P. Ciaffone and Rose B. Ciaffone Fund (2005)
Eleanor Laing Clifford Fund (2016)
Martha A. Cowan Fund (1987)
Hugh W. and Harriet K. Crawford Endowment Fund for
the Pearle L. Crawford Memorial Library (2006)
Ethel S. Cunningham Fund (1987)
Sarah B. and Dix F. Davis Fund (2002)
David L. and Elizabeth O. Dean Fund (2012)
Densmore Community Fund (2011)
Henry B. and Jane K. Dewey Fund for Wellesley College
(2007)
Directors and Corporators Fund (1984)
Douglas Center Cemetery Preservation Fund (1999)
Gerald J. and Dallas M. Eydenberg Fund (2011)
Norma Feingold Worcester History Prize Fund (2011)
Shirley Feldman Fund (2005)
First Congregational Parish, Unitarian Fund (2006)
First Unitarian Church Fund (2006)
Patricia Fisher Fund (2006)
Paris and Marion S. Fletcher Fund for United Way
(1992)
Marilyn M. and Russell S. Fox Scholarship Fund for
Non-Traditional Students (2010)
Samuel Frank Designated Fund (1993)
Kimberley Lane Godard Memorial Fund (2012)
Lois B. and Robert F. Green Fund (2001)
Francis A. and Jacquelyn H. Harrington Fund for United
Way (1992)
Rosemary Marble Harris Fund (2001)
Ginette Harrison, MD Memorial Fund (2002)
Hendricks House Preservation Fund (1999)
John and Francine Herron Park Fund (2013)
Honee A. Hess Partnership with Children Fund (1996)
Robert G. and Eliza C. Hess Fund (1979)
Robert M. Hyde Family Fund for Beaman Memorial
Public Library (2014)
Jeppson Memorial Fund (1976)
Ji-Ji’s Fund (1999)
Marcia R. Katter Memorial Fund (2001)
Lawrence M. and Augusta L. Keeler Fund (1997)
Paul J. and Dorothy B. Kervick Fund (1996)
Peter J. and Sophie Kosky Fund (1988)
Max H. and Eloise A. Kuhner Memorial Fund (2005)
Nathaniel A. Lane Memorial Fund (2014)
Prescott N. Lane Memorial Fund (2014)
Peter H. Levine Fund (2010)
Peter H. Levine and Catherine H. Levine Fund for the
First Unitarian Church (2010)
John W. Lund Fund (1993)
Lund Leadership Award (2010)
Lund Unitarian Church Fund (2011)
Frances F. Mansfield Fund (1996)
Sonia Werblin Masterman Fund (2001)
Howard J. and Dorothy R. McGuiness Funds (2004)
Micah Housing Corporation Fund (1981)
Edward P. Miner and Dauphinais Park Endowment Fund
(2003)
Barrett and Mahroo Morgan Fund (2007)
Vasiliki Strates Moschos Memorial Fund (2002)
Rani P. and Haribabu Muddana MD Fund (2001)
Marc Needleman Memorial Fund (2000)
Nichols Academy Scholarship Fund (2001)
Christopher J. Paskell Memorial Fund (2004)
Sarah Daniels Pettit and William O. Pettit Jr. Fund
(1996)
Paul M. Pezzella Fund in Memory of Patsy and Theresa
Pezzella (1999)
Pomfret Community School Arts Fund (2006)
Practical Education Fund (2010)
Lillian S. Pratt Fund (2007)
Hon. James F. Queenan Legal Services Fund (2011)
John and Gloria Rauth Library Fund (2001)
Renaissance Award Fund (2004)
Louise R. and John F. Reynders Fund (1987)
Marvin Richmond Fund (1998)
Chapin Riley Fund (2000)
John E. and Ethel E. Riley Outstanding Citizenship
Award Fund (2010)
Katharine Higgins Riley Fund (1991)
Marion & Arthur Rossiter Fund for Evangelical
Congregational Church (2011)
Saul A. Seder Fund (1991)
Harry Smith Designated Fund (1996)
Khazma A. Soffan Memorial Fund (2000)
Thurston E. Solomon and Everett J. Morter Memorial
Fund (2013)
Country Store Building Fund for East Quabbin Land Trust

Encompassing abundant forests and farms that border the Quabbin Reservoir, Petersham is the largest town in Worcester County. Yet its population is small—1,200 residents. Since 1840, decades before instituting its public library, the town has relied on its general store as a community hub.

The Country Store of Petersham is still going strong, thanks to residents whose seed money created the Country Store Building Fund. This agency fund of the East Quabbin Land Trust is dedicated to sustaining this historic building for generations to come.

“The store’s café employs residents and serves good, locally sourced food,” says Cynthia Henshaw, Land Trust executive director. “And the store sells quality produce and meats as well as crafts by local artisans.”

The fund will support capital improvements to maintain the venerable building in perpetuity.

“The Foundation is an ideal partner,” says Cynthia. “Its strong endowment management and array of services, including planned giving, will help us build our fund. Our goal is to keep the country store thriving for as long as there is a Petersham.”

AGENCY FUNDS ARE CREATED BY NONPROFIT ORGANIZATIONS TO BENEFIT THEIR OPERATIONS OR CAPITAL NEEDS.

William and Rose Abbott Memorial Fund (2015)
Abby Kelley Foster House Fund (2008)
American Red Cross of Central Massachusetts Fund (2000)
Barre Players Endowment Fund (1997)
Big Brothers/Big Sisters Mentoring Fund (1999)
Blackstone Valley Education Foundation Fund (2005)
Boylston Public Library Foundation Fund (2014)
Boys & Girls Club of Worcester Fund (2008)
Camp Putnam Agency Fund (2011)
Country Store Building Fund (2017) NEW
Dynamy Fund (1997)
Lois S. Feldman Fund (1990)
Friends of Beaman Memorial Public Library Endowment Fund (2011)
Friends of Hope Cemetery Fund (2011)
Friends of Northbridge Elders Fund (1997)
Friends of the Upton Town Library Fund (2007)
Julie Chase Fuller Endowment Fund for Mechanics Hall (1989)
Roberta Gunn Fund for Board Development (2003)
Hanover Theatre 1926 Society Legacy Fund (2015)
Timothy J. Houston Memorial Fund at Joy of Music (2016)
Jane Fund of Central Massachusetts Fund (2008)
MassEdCO Fund

Massachusetts Education and Career Opportunities (MassEdCO), provides college and career readiness and support services that enable disadvantaged individuals to envision and achieve better lives. Each year, MassEdCO provides its services free of charge to more than 14,000 clients, both youth and adults, statewide.

With its new agency fund at the Foundation, MassEdCO builds a nest egg for innovation and expansion. “MassEdCO is currently very much grant-driven,” says CEO Pamela Boisvert. “By growing our own endowment, we can invest in new programming that goes beyond our grant-funded projects.

“Our fund with the Foundation makes our organization and the good work we do visible to the many donors who trust the Foundation as steward of their hard-earned dollars,” continues Pamela, a former Foundation board member. “This fund plants a seed that will grow over the years through gifts from people who share our passion to help develop educated, capable citizens.”

MassEdCO Fund

Massachusetts Education and Career Opportunities (MassEdCO), provides college and career readiness and support services that enable disadvantaged individuals to envision and achieve better lives. Each year, MassEdCO provides its services free of charge to more than 14,000 clients, both youth and adults, statewide.

With its new agency fund at the Foundation, MassEdCO builds a nest egg for innovation and expansion. “MassEdCO is currently very much grant-driven,” says CEO Pamela Boisvert. “By growing our own endowment, we can invest in new programming that goes beyond our grant-funded projects.

“Our fund with the Foundation makes our organization and the good work we do visible to the many donors who trust the Foundation as steward of their hard-earned dollars,” continues Pamela, a former Foundation board member. “This fund plants a seed that will grow over the years through gifts from people who share our passion to help develop educated, capable citizens.”

Visitation House Inc. Fund

Visitation House, Inc. is a transitional home providing hospitality, hope and support to women facing crisis pregnancies.

Serving guests who are 18 years of age or older, Visitation House offers up to 12 mothers at a time private, furnished bedrooms, nutritious meals and classes in life skills—all at no cost to the women. Residing at Visitation House for up to six months after giving birth, they gain the support to develop the self-esteem and competencies they need to provide stable, sound homes for themselves and their infants.

Visitation House relies on private sector donations and grants to fund its staff and services, and its endowment, including this new agency fund, is important to securing its future. “We’ve heard good things about the Foundation,” says Evelyn Lindquist, executive director, “so we decided to open this fund as part of our strategy to build our endowment.”
The Acorn Society: CREATING YOUR LEGACY

The Acorn Society honors individuals who have named the Foundation as beneficiary of a bequest, trust, or retirement fund. Just as an acorn grows into a mighty oak, a planned gift will yield enormous benefits to future generations.

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

For a confidential conversation, call us today.

2017 Members
Anonymous (9)
James C. and Colleen S. Abrams
Robert S. Adler
Ann Bergman and Bill Glennon
Edward W. Betke
Mark P. Bilotta and Henry O. Ritter
Brian L. and Betty G. Bjurling
Maurice J. and Pamela K. Boisvert
Michael D. and Mary Ann S. Brockelman
James R. and Paula R. Buonomo
Kenneth F. and Nancy Candito
Brian M. and Maureen E. Chandley
Richard and Deanna Charves
Elizabeth A. Clifford
Richard P. Coonan
Dix F. and Sarah Davis
James S. Demetry
Henry B. and Jane K. Dewey
Ross K. and Lisa F. Dik
Richard and Carol Dymek
Barbara M. Fitts
Warner S. and Mary F. Fletcher
Gerald and Jane Freed
Dina and Gerald L. Gaudette III
Rodney M. Glasgow Jr.
Dennis F. and Frances C. Gorman
Suzanne E. Gray and Ernest J. Osterman
David R. and Rosalie A. Grenon
Claire L. Halvey
Maureen Harrington
Richard E. Hedin
Nason A. Hurowitz and Martha P. Grace
Donald Inglis
Shirley H. Jacobs
M Howard and Frances Jacobson
Janet S. Jones
Kenneth R. and Patricia L. Jones
Richard J. Kisten
Sarah Lange
David P. Leach and Audrey Klein-Leach
Catherine H. Levine
Ann Lewis
Margaret D. Lincoln
Ann T. Lisi
Monica Escobar Lowell
C. Jean McDonough
Satya B. and Supriya Mitra
Barbara B. and Raymond E. Morin
Frederic H. and Victoria Mulligan
Linda C. Nelson
Karen M. Nunley
Vincent J. Osterman
Martha R. Pappas
Marsha R. and Philip L. Platt
Bonnie M. Prescott
James F. and Helen E. Queenan
John A. and Gloria W. Rauth
Azim Rawji and Robin Van Liew
William J. and Mary C. Ritter
Susan and C. Reid Roberts
Linda Carlson Romano
Scott and Lois Rossiter
Paul R. and Fay* Rossley
R. Joseph Salois
Sally S. Schenck
Evelyn B. Silver
Laurence J. and Alison D. Specter
David C. Steelman and
Virginia Theo-Steelman
Kelly A. Stimson
Joseph N. and Charlene M. Stolberg
Cynthia P. Strub
Laurie D’Amico Tigan
Sumner B. Tilton Jr.
Cheryl Wilfong and
William G. McKim
Margaret Wolcott
Robert and Dawn Wolf
David K. Woodbury
Kimball R. Woodbury

The Janet S. Jones CGA: A Way to Say Thanks

Janet Jones used a charitable gift annuity to help create the Arthur E. & Janet S. Jones Fund, a field of interest fund to support programs that enable disadvantaged girls to reach their full potential.

“After my death, I trust the Foundation to use this fund wherever it can do the most good for our community,” says Janet. “I can’t foresee the future. The Foundation excels at understanding our community’s needs and developing timely and effective solutions.

“Worcester welcomed us and it has been a wonderful place to live and raise our family. This is our way of saying ‘Thank you.’”

* Deceased
CONTRIBUTORS

In 2017, the Foundation received $5.6 million in gifts. We list those who contributed $250 or more by fund type and extend our sincere gratitude to all who made a gift during the year.

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

2017 Gifts by Fund Type
(in millions)

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Advised</td>
<td>$0.90</td>
</tr>
<tr>
<td>Designated</td>
<td>$0.45</td>
</tr>
<tr>
<td>Discretionary and Field of Interest</td>
<td>$0.42</td>
</tr>
<tr>
<td>Agency</td>
<td>$3.24</td>
</tr>
<tr>
<td>Scholarship</td>
<td>$0.59</td>
</tr>
</tbody>
</table>

Total Gifts = $5.6 Million

GIFTS TO DISCRETIONARY & FIELD OF INTEREST FUNDS
George I. Alden Trust
Barr Foundation
Karl and Jan Bjork
Wanda L. Cantlin
Janet Carrick Residuary Trust
Brian M. and Maureen E. Chandley
Estate of David N. Taft
Matthew V. and Julie J. Fletcher
Warner S. and Mary F. Fletcher
Ann Lewis
Michael C. Pollak
Melvin M. and Martha Rosenblatt
William J. Streit
Worcester Bravehearts Baseball

GIFTS TO DONOR ADVISED FUNDS
John and Ann Marie Argitis
Bartholomew & Company, Inc.
April Chase-Lubitz
Carolyn S. Crane
Melvin S. Cutler Charitable Foundation
Geoffrey K. Dancey and Rashida Garcia-Dancey
Ross K. and Lisa F. Dik
Jacqueline C. Falman
Daniel L. Fontaine
Nicholas H. Fontaine
Richard R. and Debra P. Fontaine
Francis A. Ford and Shirley A. Doyle
Gerald M. and Patricia F. Gates
Barbara H. Gaudette
David R. Grenon
Herlihy Insurance Group
Kirby Foundation

GIFTS TO SCHOLARSHIP FUNDS
Anonymous (2)
James C. and Colleen S. Abrams
Irene M. Adamaitis
Carrick Foundation
Janet Carrick Residuary Trust
Clifford & Rano Insurance Agency Inc.
Ken A. Crerar and Peter F. Garrett
Melvin S. Cutler Charitable Foundation
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
Christyne Davidian
Dowling & O’Neil Insurance Agency
Heather and John F. Duke Jr.
GIFTS TO DIRECTORS & CORPORATORS FUND

Unrestricted donations provide the Foundation the flexibility to respond to both urgent and strategic needs, and help create a community that provides opportunities for all. We thank all who gave in 2017.

Anonymous (1)
Colleen Abrams
Robb B. Ahlquist
James A. Andreoli
David P. Angel
Roy Angel
Michael and Marie Angelini
Irfan and Maria Asghar
Joycelyn Augustus
Robert S. Bachelder
Thomas J. Bartholomew
John and Kay Bassett
Paul Bel sito
Sarah G. Berry
Norman Bitsoli
Elissa Boisvert
Maurice J. and Pamela K. Boisvert
George F. Booth II
Anne M. and Robert A. Bourgeois
Charlotte Bramley
Bright Funds Foundation
James B. Broadhurst
Michael D. Brockelman
Denise H. Brookhouse
John H. Budd
James R. Buonomo
Frank R. Callahan
Linda T. Cammuso

Henry Camosse Jr.
Jennifer D. Carey
Ann E. Carlson
Kirk and Price Carter
Deborah D. Cary
Matilde Castiel
Linda A. Cavaio li
Brian M. Chandley
Saqib N. and Ambreen S. Chaudhary
Joy C. Child
Jeffrey Chin
Christos and Mary T. Cocaine
Charitable Trust
J. Christopher and Catherine Collins
James E. Collins
Harriette L. Chandler
Robert J. Cousy
Joseph P. Cox
Tracy A. Craig
Benjamin Craver
Michael Crawford
Frederick G. Crocker Jr.
Kathryn M. Crockett
Melvin S. Cutler
Jill C. Dagilis
Geoffrey Dancey and Rashida Garcia-Dancey
Dix and Sarah Davis
Laurie Davis
Daniel de la Torre Jr.

Eileen R. de Castro
Henry B. and Jane K. Dewey
Morgan B. Dewey
Digital Federal Credit Union
Ross K. and Lisa F. Dik
Carol and Jim Donnelly Jr.
Frederick M. Dowling
Donald Doyle
Thomas Dube
Karen E. Duffy
Ellen S. Dunlap and Frank Armstrong
Susan Engel kemeyer
J. Irving England and Jane L. England
Charitable Trust
Episcopal Diocese of Western Massachusetts
Stephen J. Erickson
Barbara E. Fargo
Saul F. Feingold
Allen W. Fletcher
Justin L. and Laine Fletcher
Patricia A. Fletcher
Warner S. and Mary F. Fletcher
Jack and Robin Foley
Paul and Karen Fontaine
David P. Forsberg
Mark and Jan Fuller
Gerald M. and Patricia F. Gates
Gerald L. Gaudette III
Daniel F. George

Martha P. Grace
John E. Graham
Cynthia and Tim Gray
Green Leaf Construction
Ivan and Noreen Green
David R. Grenon
J. Michael Grenon
Abraham W. Haddad
Ernest S. Hayeck
John Herron Jr.
Honee A. Hess and Phil Magnusson
Emily G. and James Holdstein
Kathryn Zing g Hunter
Donald Inglis
M Howard and Frances Jacobson
Timothy M. and Julie Jarry
Kenneth R. and Patricia L. Jones
Steve and Lee Joseph
Kevin R. Kearney
Alison C. Kenary
Robert M. Kennedy
Mansoor and Fauzia Khan
Thu ha T. Le
Diane L. LeClair
Patsy C. Lewis
Joseph Lian Jr.
Robert G. Lian
Ann T. Lisi and Joel P. Greene
Linda Carre Looft
Stephen B. and Valerie F. Loring
Monica Escobar Lowell
Susan M. Mailman
Donald O. Maloney Jr.
Jonathan L. Mannina
Edward J. Markey
Heather A. Maykel
Christopher W. McCarthy
Samantha P. McDonald
C. Jean McDonough
McGregor Family
Bob and Penny McLaren
Jean G. McLaren
Christopher and Jayne Mehne
Katherine H. and John K. Metzger
John O. Mirick
Satya B. Mitra
Ann K. Molloy and Kenneth Stillman
Charles F. Monahan Jr.
Janet W. Moore
Barrett and Mahrho Morgan
Gail M. Morgan
Jessica Morris
Frederic H. Mulligan
Ginger L. Navickas
David A. Nicholson
Kevin M. & Ree O’Brien
Christopher M. O’Keeffe and Holly G. Baab
David R. Ojerholm
Joseph L. Pagano
Sahdev and Carolyn Passey
Thoru Pederson
Deborah A. Penta
Perry R. and Diane J. Pero
Neil F. Petersen Jr.
Paul M. Pezzella
Cynthia and Stephen Pitcher
Sherri G. Pitcher
Christine M. Proffitt
Marla Maykel Pyle
Hilda Ramirez
Dennis Rice
Mary C. Ritter
Shelley and Todd Rodman
Laurie B. Ross
Scott and Lois Rossiter
Paul Rossley
Ruth R. Rubin
Kent Russell and Aisling Gaughan
Francis M. Saba
Kimberly M. Salmon
Joe and Joanne Salois
Ralph F. Sbrogna
Paul F. Schlaikjer
Paul F. Scully
Carol L. Seager
Rashid M. and Humaira Shaikh
Jay S. Sherwin
John F. Shoro
Philip O. Shwachman
Ahmad D. Siddiqui and Zahra Sheikh
Marvin S. Silver
Edward and Lowerre Simsarian
Michael D. Sleper
Jeffrey S. Solomon
J. Soto Jr.
Peter R. Stanton
Carolyn J. and Howard E. Stempler
Kelly A. Stimson
Alan M. Stoll
Sheila and George Tetler III
Brian Thompson
Troy B. Thompson
David N. Tinsley
Margaret W. Traina
Tuyet Tran
Jayna Turchek
UBS Employee Giving Program
United Way of Central Massachusetts
Unum Matching Gift Program
Wayne M. Ushman
Carmen D. Vazquez
Wyatt R. Wade
William D. Wallace
Matthew Wally
Victoria and Jim Waterman
Charles S. Weiss
James A. Welu
Meridith D. Wesby
Lucy and Harry T. Whitin III
Thomas J. Wickstrom
Jack L. Wolfson
David and Sue Woodbury
Yesod Foundation
Janice B. Yost
Alex and Jessika Zequeira
Robert J. Zibinskas
Valerie Zolezzi-Wyndham

IN MEMORIUM
The Greater Worcester Community Foundation family lost several treasured friends during 2017, including…

George F. Bernardin
Cushing C. Bozenhard
Kevin Bradley
Frank X. Dufault Jr.
Doris R. Garbose
John J. Healy
Michael E. Huppert
Forrest A. Jacobs
Marianne Jeppson
Dan Lewis
Laura G. McNaughton
Donald R. Melville
Mary H. Melville
Charles Moser
Nydia Moser
Elizabeth C. Newell
Theresa (Tarkianen) Patriquin
Fay Rossley
Sumner Silver
FINANCIAL Stewardship

The goal of the Foundation’s investment program is to preserve and enhance the value of donor gifts, maintain capital for the future, and meet community needs today. To accomplish this goal, we sustain a diversified portfolio overseen by multiple managers.

The 2017 Investment Committee Members were: Timothy M. Jarry, Chair; Thomas J. Bartholomew; J. Christopher Collins; James E. Collins; Dix F. Davis; Warner S. Fletcher; Abraham W. Haddad; and Jeffrey S. Solomon. The Committee is supported by independent investment consultants Prime Buchholz & Associates, which provides technical assistance, manager selection, and ongoing evaluation.

Net Investment Returns (through 12/31/17)

<table>
<thead>
<tr>
<th></th>
<th>1 Yr.</th>
<th>3 Yr.</th>
<th>5 Yr.</th>
<th>10 Yr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>GWCF Long-Term Pool</td>
<td>15.3</td>
<td>6.3</td>
<td>6.9</td>
<td>4</td>
</tr>
<tr>
<td>GWCF Policy Benchmark</td>
<td>14.1</td>
<td>5.5</td>
<td>5.8</td>
<td>3.2</td>
</tr>
</tbody>
</table>

Portfolio (at 12/31/17)

- Domestic Equity: 19.6%
- International Equity: 30.2%
- Flexible Capital: 29.1%
- Fixed Income: 16.4%
- Real Assets: 4.3%
- Cash: 0.4%

The audit of the Foundation’s financial statement as of and for the years ending December 31, 2017 and 2016 was conducted by Alexander, Aronson, Finning & Co., PC. For a complete copy of the audited financials visit our website at www.greaterworcester.org, email donorservices@greaterworcester.org, or call 508-755-0980.

SUMMARY FINANCIAL STATEMENTS (As of December 31)

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>$155,090,422</td>
<td>$139,194,469</td>
</tr>
<tr>
<td>Cash &amp; Equivalents</td>
<td>$1,284,062</td>
<td>$776,467</td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>$435,000</td>
<td></td>
</tr>
<tr>
<td>Other Assets</td>
<td>$205,921</td>
<td>$179,410</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$157,015,405</td>
<td>$140,150,346</td>
</tr>
<tr>
<td><strong>Liabilities &amp; Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants Payable, Accounts Payable &amp; Other Liabilities</td>
<td>$411,173</td>
<td>$115,525</td>
</tr>
<tr>
<td>Life Income Gift Liabilities</td>
<td>$991,931</td>
<td>$817,246</td>
</tr>
<tr>
<td>Funds Held for Agency Endowments</td>
<td>$22,126,274</td>
<td>$17,823,159</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$23,529,378</td>
<td>$18,755,930</td>
</tr>
<tr>
<td>Net Assets with Donor Restrictions</td>
<td>$132,127,592</td>
<td>$120,224,414</td>
</tr>
<tr>
<td>Net Assets without Donor Restrictions</td>
<td>$1,358,435</td>
<td>$1,170,002</td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$133,486,027</td>
<td>$121,394,416</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td>$157,015,405</td>
<td>$140,150,346</td>
</tr>
<tr>
<td><strong>Revenues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$5,893,535</td>
<td>$5,741,810</td>
</tr>
<tr>
<td>Net Investment Returns</td>
<td>$20,529,721</td>
<td>$7,060,506</td>
</tr>
<tr>
<td>Other</td>
<td>$137,399</td>
<td>$222,487</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td>$26,560,655</td>
<td>$13,024,803</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants Approved</td>
<td>$8,400,355</td>
<td>$6,614,110</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>$1,658,819</td>
<td>$1,661,035</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$10,059,174</td>
<td>$8,275,145</td>
</tr>
</tbody>
</table>

GWCF Long-Term Pool 15.3 6.3 6.9 4
GWCF Policy Benchmark 14.1 5.5 5.8 3.2
“The Foundation exists to understand and address our community’s pressing problems and opportunities. Few of us on our own have the time or means to do this. Through discretionary or field of interest funds, donors create scale that leverages the mission and expertise of the Foundation.

Our shared goal is to achieve significant impact where it matters most. Growing the number and size of our grants allows us, collectively, to maximize the good we can do for Greater Worcester.”

Gerald M. Gates, Chair, Greater Worcester Community Foundation

GROWING THE GOOD: A CAMPAIGN for GREATER WORCESTER

Growing the Good: A Campaign for Greater Worcester is the Foundation’s initiative to increase its capacity for leadership grantmaking. The Foundation focuses on causes and needs that span the entire community with donors’ discretionary and field-of-interest funds. These funds give the Foundation the latitude to address both urgent needs and major opportunities with long-term benefits.

The Foundation draws from these funds to make its community grants, investments that directly capitalize on its knowledge, relationships, and goodwill—resources that enable us, through the Foundation, to make more of an impact together than we could on our own.

Take part in our Growing the Good campaign in one or more of these ways:

- Create your own discretionary or field-of-interest fund with a gift of $25,000 or more
- Create or add to such a fund through a planned gift
- Make a gift to our Early Childhood Initiative Fund
- Contribute to the Foundation’s Directors and Corporators Fund, which builds our operating reserves.

To find out more, contact Kelly Stimson, vice president of donor services, at 508-755 0980 or email donorservices@greaterworcester.org today.
STAFF

Ann T. Lisi
President & CEO

Diane S. Allain
Operations Manager

Jonathan Cohen
Program Officer

Liz Nye
Donor Services Associate

Christopher M. O’Keeffe
Vice President for Program

Mark Onanian
Staff Accountant

Beckley W. Schowalter
Scholarship Program Manager

Sarah Shugrue
Program Officer

Kelly A. Stimson
Vice President of Donor Services

Jasmine Vasquez-Okutoro
Program Associate

Jacqueline L. Williams
Administrative Assistant

Contact us at 508-755-0980
or email donorservices@greaterworcester.org

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

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