Creating Opportunity for All

Greater Worcester Community Foundation

2016 ANNUAL REPORT
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On the cover:
At Webster Square Day Care Center, a Foundation-funded program engages teachers in best practices that enrich child development. The Foundation’s Early Childhood Initiative is working with the entire community to improve a child’s earliest years. The benefits will be both immediate and far-reaching, as today’s toddlers grow into productive adults.

Foundation grants invest in evidence-based programs that support healthy development from prenatal care through a child’s first school years. The Foundation is also building a network of collaboration to conduct public education and advocacy—laying the groundwork for policies that bring quality pre-K education within the reach of all families.
SINCE OUR START IN 1975, Greater Worcester Community Foundation has drawn people who believe they can do more for our community, on a far larger scale, by working together.

Our shared resources include an endowment more than $139 million, the source of more than $6.6 million in annual grants that increase opportunities for all in our region to obtain the fundamentals of a productive life—economic security, housing, health care and a sound education.

With its staying power, track record of leadership, strong relationships across sectors, and deep knowledge of the region’s needs and nonprofits, your Foundation is a force multiplier for donors and nonprofits alike. Donors see that their philanthropy reaches further through the Foundation’s expert endowment management, vigilant stewardship, and responsive grantmaking. Nonprofits regard Foundation grants as a source of pride as well as funds, and value its Nonprofit Support Center for training that increases their effectiveness.

Your Foundation’s resources also include knowledgeable volunteers from all sectors of the community. Their careful evaluations of grant applications and site visits with grantees deepen our relationships with nonprofits. And our all-volunteer board sets the direction of the Foundation and oversees its operations and governance.

In 2016, the Foundation board moved forward with its strategy to help the youngest among us. The Foundation’s Early Childhood Initiative will engage the entire community in providing a stronger start for our children during their formative first years, which set the path for success in school and life.

Thank you for joining us in creating a community that offers opportunity to all.

Ann T. Lisi
President and CEO

Gerald M. Gates
Chair

Letter to Our Community

At a Glance
(as of 12/31/2016)

GIFTS
Gifts received $5.7 MILLION

$3.9 million for existing funds
$1.8 million for creating new funds

1069 gifts
917 donors
12 new funds
569 funds in total

GRANTS & SCHOLARSHIPS
Grants and scholarships approved $6.6 MILLION

519 grantee organizations
391 scholarship recipients
received a total of $610,251

ASSETS
Total assets $139.2 MILLION

Investment returns 5.3%
2016 **Highlights**

**THE EARLY CHILDHOOD INITIATIVE**

of the Foundation gained momentum with grants, partnerships and public policy advocacy. Its goal is to develop resources and practices region-wide that give our children a stronger start during their formative first years.

- The Board established an Early Childhood Committee to lead public outreach and advocacy
- Grants totaling $552,500 invested in evidence-based programs that foster early learning and development

**THE FOUNDATION ENDOWMENT**

portfolio increased by 5.3% and now exceeds $139 million. Discretionary and field-of-interest funds totaling $62.9 million provided community

**GERALD M. GATES** (pictured with his wife, Attorney Patricia Finnegan Gates) became chair of the Foundation Board in May, succeeding Lee Gaudette.

**A SCHOLARSHIP RECEPTION** held in June drew more than 200 awardees and donors, including Johnathan Ruggiero, recipient of the Steve Drawbridge Memorial Scholarship, his father Joseph (left) and donor Jim Drawbridge.
grants of more than $2.4 million targeting five strategic priorities: early childhood development; youth development and education; economic security; healthy communities; and the arts, environment, and civic engagement.

**THE 12TH ANNUAL RENAISSANCE AWARD** of the Foundation, an award established by founding donor Jack Lund (1920-2010) to honor exemplary nonprofit leaders, was presented to Alex Zequeira, then president of Nativity School of Worcester.

**THE PROFESSIONAL ADVISORS NETWORK** is a group of financial professionals who partner with the Foundation to customize charitable planning for clients and share expertise. Their peer forums included a joint seminar with the Estate and Business Planning Council of Worcester County on the 2014 U.S. Trust Study of High Net Worth Philanthropy.

**LEADERSHIP WORCESTER,** a joint program with Worcester Regional Chamber of Commerce to develop new civic leaders, enrolled its second annual cohort in September. This group of 27 outstanding professionals will hone leadership skills while examining such issues as economic development, education, public health, culture, and public safety.

**THE NONPROFIT SUPPORT CENTER** produced a series of 12 well attended and highly rated seminars on fundraising, strategic financial management, board and leadership development, human resource management, and crisis communications.

**YOUTH FOR COMMUNITY IMPROVEMENT (YCI),** now in its 17th year, engaged 15 students from 12 high schools in grantmaking. The YCI team awarded 10 grants totaling $22,200 to programs offering after-school arts activities, improving neighborhoods, and increasing access to fresh produce. They also held a reception for grantees, took part in the NE Regional Youth Philanthropists Conference, and conducted a workshop at the GradNation Boston Summit.
THE FOUNDATION STRIVES TO BUILD a community in which all can thrive, particularly the youngest among us. Yet in Worcester, many children are unprepared to learn when they enter kindergarten. By grade three, just 38 percent of Worcester children read at grade level.

Through its Early Childhood Initiative, the Foundation is devoting significant resources to create conditions that prepare our youngest children to succeed in school and life—including universal access to quality early education.

Recognizing that a child’s first years set the stage for life, the Foundation and its partners are working to build a learning readiness pipeline that extends from prenatal care through grade three.

In 2016, the Foundation board formed a committee to lead its Early Childhood Initiative.

“Too many children start kindergarten lacking the skills to succeed,” says its chair, Jack Foley, vice president, Government and Community Affairs, Clark University. “Working with our partners, we will invest in effective models to develop these skills and drive public policies to fund their delivery.

Time and money invested in early learning will reap enormous rewards down the road.”

The Foundation is directing grants into evidence-based programs that:

★ Increase the availability of quality pre-K education
★ Stem summer learning loss of children in first through third grades
★ Support parents in nurturing their children’s development

While making grants, the Foundation is expanding the Early Childhood Initiative with community-wide outreach and advocacy. Enlisting support across sectors, members of the Early Childhood Committee have begun meeting with public officials.

“Closing this readiness gap, which disproportionately affects low-income children, is the wisest investment we can make, with the biggest return,” says City Manager Edward M. Augustus, Jr., who has turned Recreation Worcester into a year-round learning and recreation resource serving 1,600 children.

Senator Michael O. Moore, who represents the Second Worcester District in the Massachusetts State Senate, says, “We need universal access to quality pre-K education, with a dedicated funding source that extends to private providers. Public schools don’t have the capacity to do this on their own.

“The first step is public awareness. Voters need to see that quality pre-K education is an urgent and cost-effective investment. I look forward to working with the Foundation and its partners to make quality early education available to all of our children.”

“Too many children start kindergarten lacking the skills to succeed,” says Jack Foley, chair of the Foundation’s Early Childhood Committee. “Investing in early learning will reap enormous rewards down the road.”
Early Childhood Initiative: **Building a learning readiness pipeline**

**TEACHERS BECOME LEARNERS TOO** at five early education centers in Worcester taking part in an innovative pre-K professional development program. Collaborating with a master teacher, they adopt evidence-based best practices to assess and enhance their teaching strategies, from lesson plans to interactions with children and each other.

“We’ve learned how much a child develops by age five,” says Eve Gilmore, executive director of Edward Street Child Services, which designed the program, funded by Foundation grants. “A child needs a strong start. By elevating childhood learning into a community-wide commitment, the Foundation’s Early Childhood Initiative will benefit Worcester children now and for generations to come.”

**Summer learning close to home**

Plumley Village, an affordable housing community, is a hub of summer learning for its youngest residents. Its **Catch the Reading Bug** program is a site of the Summer Literacy Initiative, co-funded by the Foundation and the United Way.

“Kids read more,” says Anne Vinick, coordinator, “and gain confidence.” This summer, with another Foundation grant, a new Reading Bug program will prepare preschoolers and their parents for kindergarten with sessions on such topics as nutrition, health, and child advocacy.

**First comes family life**

Learning begins at home. But what if a home is unsafe? In Worcester, where infant mortality is almost double the state average, the **Court Appointed Special Advocates (CASA) Project of Worcester County** serves children removed from homes investigated for abuse or neglect.

“Our volunteer advocates stand by children in the worst moment of their lives,” says Executive Director Robb Zarges, PhD. “We strive to minimize protective placements and obtain a permanent, safe and loving home for the child.”

Currently handling half of the court’s 700 child welfare cases, CASA has launched a growth plan. “We want to serve every child,” says Robb. “Foundation support has been critical, both its consistent funding and Nonprofit Support Center, which helps us develop our staff.”

**DONOR DR. PETER METZ ON CASA:**

“CASA serves our most vulnerable children. They are pulled from home at a time when secure attachment is essential for their development. The Foundation’s focus on early childhood couldn’t be a more important priority. The years between birth and age five make a huge impact on the capacity of children to grow into productive adults and become effective parents themselves.”

Dr. Metz and his wife, Phyllis Pollack, MD, a pediatric cardiologist, support CASA through their donor advised fund.

Learning is integral to a child’s day at five pre-K centers where teachers take part in an innovative program and adopt best practices that enrich child development.
Community Grants: Developing life-changing opportunities

Drawing from funds created by donors to provide discretionary and field of interest grants, the Foundation annually makes community grants in excess of $2.4 million.

The Foundation’s all-volunteer Community Grants Committee convenes to review applications and recommend grantees. “Our streamlined process gives us more time to research mission-driven initiatives, align grants with strategic initiatives, and deepen relationships with grantees,” says its chair, Brian Chandley, a Foundation board member. “As a result, we can make larger and longer-term funding commitments.”

Community grants invest in proven and promising models that create opportunities for all. **Genesis Club** is a leading program of Clubhouse International, which pioneered an evidence-based model that helps people with mental illness lead full lives. “Our members are eager to contribute,” says Genesis Club Executive Director Kevin Bradley. “Here, they join a supportive community and develop the confidence and skills to attain education, employment and wellness.”

Foundation grants back Genesis programs, which include occupational and school readiness and youth development. In 2016, 155 Genesis members gained employment and 56 enrolled in post-secondary education.

**Abby’s House** opened in 1976 as a nine-bed shelter, one of the first in the country dedicated to women. Celebrating its 40th anniversary last year, Abby’s House has added permanent housing—70 single rooms and seven two-bedroom apartments for guests with children. An advocate helps each woman access the services she needs to get her life back.

Executive Director Stephanie L. Page says, “The Foundation and the entire community have helped us grow and meet the increasingly complex needs of homeless and abused women.”

**Dismas House** began its Prisoner Reentry Program in 1988 with Foundation support. “Ex-prisoners’ needs cross silos,” says David McMahon, founding director. “We fashioned our own toolkit to succeed, with housing, health care and jobs.”

The Dismas community includes a farm where residents run a thriving produce operation and sell excess energy from its solar panels.

“The Dismas model works,” says David. “In contrast to the state recidivism rate of 60 percent, more than 60 percent of our clients stay out of jail.”

**DONOR LISA KIRBY GIBBS ON DISMAS HOUSE:**

“A decade ago, the Foundation introduced me to Dismas House. I met with Dave and some residents and saw their initiative, know-how and hard work. I enjoy contributing to their success.”

Worcester resident Lisa Kirby Gibbs invests in Dismas House through her donor advised fund.
At Dismas House, a community that includes a thriving farm, ex-prisoners gain the skills, support and work experience to build new lives.
Community grants also invest in strengthening our shared assets—from cultural institutions to natural resources—and making this civic capital available to all.

The Greater Worcester Land Trust has preserved 2,500 acres of undeveloped land. Foundation grants enable its two-person staff to enlist volunteers of all ages and create footpaths that connect this acreage with neighboring wildlife habitats.

“City dwellers need a common backyard,” says Executive Director Colin M.J. Novick. “Our trails link the city with a four-town wildlife corridor. By intertwining the lives of humans and wildlife, we benefit both.”

In Harmony: Music Worcester Comes to Worcester is an initiative of Music Worcester that enables students in the Worcester Public Schools to learn from main-stage performers. “Foundation grants have helped us envision and grow our outreach,” says Adrien Finlay, Music Worcester executive director.

Many Worcester students are the first in their families to pursue higher education. Community grants invest in outstanding programs that guide aspiring students into college, including Let’s Get Ready; Dynamy Academy; and the College Success Program at Clark University’s Adam Institute.

Bottom Line extends its model to include employment. “We support students until they graduate prepared for a career,” says Justin Strasburger, executive director. “Many return and join the local work force.

“The Foundation has been key to our growth, both its grants and Nonprofit Support Center, which trains us in capacity building.”

The Collegiate Success Institute
Worcester, a program of Massachusetts Education & Career Opportunities (MassEdCO), matches city high schools with corporate and collegiate partners. During both junior and senior years, students join mentors for a six-week after-school program on their partner’s campus. Trained by MassEdCO, corporate and collegiate volunteers conduct workshops that span both college and career readiness. “Students and mentors form strong bonds,” says Pamela Boisvert, CEO of MassEdCO. “Almost all students go on to college.”

The Minority Achievers Program (MAP) of the YMCA of Central Massachusetts enables students to prepare for post-secondary education in the same welcoming place many have enjoyed since childhood. Teens hone academic skills, tour colleges, explore careers, and engage in community service projects.

“MAP inspires students to become leaders,” says President and CEO Kathryn Hunter. “They enroll in college or enlist in the military. Years later, many return to the Y as members, mentors and volunteers.”

Bottom Line’s mentoring-intensive model guides low-income students, many the first in their families to pursue higher education, from applying to college through graduating prepared for a career.
COMMUNITY GRANTS support nonprofit organizations that build healthy and vibrant communities in Central Massachusetts. Areas of interest are: Arts, Civic Engagement, and Environment, Early Childhood, Economic Security, Healthy Communities, and Youth Development and Education. Community Grants are made possible by the generosity of donors who have set up endowment funds with us for this purpose.

**ARTS, CIVIC ENGAGEMENT, AND ENVIRONMENT: STRENGTHENING CIVIC LIFE, ENVIRONMENTAL HEALTH, AND CREATIVE ARTS ENGAGEMENT.**

- **ART in the PARK**, Worcester, Summer Art in Elm Park $10,000
- **ArtsWorcester**, Aurora Gallery $10,000
- **Canal District Alliance**, Blackstone Canal Horse and Wagon Tours $2,000
- **Community Harvest Project**, Volunteer Farming $15,000
- **Discovery Museums**, Discovery Science: Worcester $5,000
- **EcoTarium**, Family Access Program $10,000
- **Fitchburg Art Museum**, Latino Community Access Project $7,500
- **Greater Worcester Land Trust**, Increasing Public Engagement with Forest, Trails, and Water $7,000
- **Joy of Music Program**, Financial Aid $10,000
- **Massachusetts Audubon Society**, Nature Education and Recreation Programs for Worcester Youth $18,000
- **Mount Grace Land Conservation Trust**, Community Stewardship $6,500
- **Music Worcester**, In Harmony: Music Worcester Comes to Worcester $10,000
- **Old Sturbridge Village**, Educational Outreach to Southbridge Schools $5,000
- **Opera New England of Northeastern CT**, Opera and Symphony Programs for Southbridge Schools $3,500
- **Pakachoag Music School of Greater Worcester**, Financial Aid $4,000
- **Preservation Worcester**, Operating Support $9,000
- **WCUW Community Radio**, Giving Voice to All of Worcester’s Communities $10,000
- **Worcester Center for Crafts**, Youth Craft + Creativity Program $10,000
- **Worcester Center for the Performing Arts**, Adopt-a-School Worcester Partnership $5,000
- **Worcester Chamber Music Society**, Community Outreach $10,000
- **Worcester Cultural Coalition**, Building Creative Community in Worcester $17,500
- **Worcester Interfaith**, Worcester Clemente Course $10,000
- **Worcester Regional Research Bureau**, Operating Support $6,000
- **Worcester Youth Orchestras**, Financial Aid $5,000
**EARLY CHILDHOOD:** BUILDING A SOLID FOUNDATION FOR A HEALTHY AND PRODUCTIVE LIFE DURING A CHILD’S FIRST EIGHT YEARS.

Apple Tree Arts, Head Start Preschool Music Outreach $15,000
Bancroft School, Worcester Partnership with Elm Park Community School $60,000
CASA Project, Child Court Advocacy $25,000
Children’s Friend, Early Learning Center $15,000
Community Builders at Plumley Village, Catch the Reading Bug Summer Program $25,000
Community Healthlink, Together For Kids $12,000
Economic Empowerment Trust Fund, SeedMA Worcester $15,000
EcoTarium, 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
Elm Park Center for Early Childhood Education, Program Expansion $15,000
Family Health Center of Worcester, Baby Cafe $15,000
Family Health Center of Worcester, Centering Pregnancy Program $10,000
Guild of St. Agnes of Worcester, Teacher Education $10,000
HOPE Coalition, Early Intervention Project $22,000
Horizons for Homeless Children, Central Region Playspace $8,000
Jewish Family & Children’s Service, School Consultation Program $7,500
Kennedy Donovan Center, Fostering Early Connections $12,000
Latino Education Institute, Family Engagement Initiative $25,000
Literacy Volunteers of Greater Worcester, English Language Literacy for Immigrant Mothers $5,000
Our Father’s House, Health & Wellness for Homeless Children $15,000
Pernet Family Health Service, Services for Young Parents $20,000
Rainbow Child Development Center, Early Childhood Center $15,000
United Way of Central Massachusetts, Summer Learning Collaborative $60,000
Worcester Community Action Council, Adult Basic Education for Head Start Parents $25,000
Worcester Comprehensive Education & Care, Teen Parent Support $7,500
Worcester Jewish Community Center, Scholarships for Afterschool and Summer Childcare Programs $15,000
YMCA of Central Massachusetts, Central Community Branch Preschool $6,000
YWCA of Central Massachusetts, Child Care Partnership Pilot $10,000

**ECONOMIC SECURITY:** SUPPORTING FAMILIES AND INDIVIDUALS IN ATtainING HOUSING, EDUCATION, JOB SKILLS, AND EMPLOYMENT OPPORTUNITIES.

Abby’s House, Shelter, Housing & Advocacy Operations $18,000
African Community Education Program, Family Outreach & Education $21,000
American Red Cross, Disaster Relief & Recovery $9,000
Ascentria Care Alliance, Immigration & Legal Assistance $25,000
Catholic Charities of the Diocese of Worcester, Citizenship for Families $12,000
Central Massachusetts Housing Alliance, Public Education & Advocacy $12,000
Community Legal Aid, Immigrant Victims Legal Advocacy Project $15,000
Friendly House, Frances Perkins Transitional Housing $21,000
Friends of the Shrewsbury Public Library, English Conversation Circle $5,000
Habitat for Humanity-MetroWest/Greater Worcester, New Home Build in Worcester $7,500
Interfaith Hospitality Network of Greater Worcester, Transitional Shelter Operations $10,000
Literacy Volunteers of Greater Worcester, Support for Adult Immigrant & Refugee Job Seekers $20,000
Literacy Volunteers of the Tri-Community, Literacy Volunteers of South Central Massachusetts $7,500
Matthew 25, Housing Maintenance $10,000
Montachusett Interfaith Hospitality Network, Family Pathways Project $15,000
NewVue Communities, Neighborhood Initiative $20,000
Notre Dame Health Care, Educational Bridge Center $5,000
Oak Hill Community Development Corporation, Community Development & Economic Security $10,000
South Middlesex Opportunity Council, Greater Worcester Housing Connection $15,000
Grant Highlights continued

Southeast Asian Coalition of Central Massachusetts, Building Vibrant Communities $25,000
Spanish American Center, Nos Estamos Ayudando / Helping Ourselves $6,000
United Neighbors of Fitchburg, Empowerment Through Education $6,000
Worcester Anti-Foreclosure Team, Operating Support $7,500
Worcester Common Ground, Operating Support $10,000
Worcester Community Housing Resources, Affordable Housing Services in Worcester County $10,000

HEALTHY COMMUNITIES: ADVANCING COMMUNITY HEALTH IMPROVEMENT, INCLUDING EQUAL ACCESS TO HEALTH CARE.

Advocacy for Refugee & Immigrant Services for Empowerment, Suicide Prevention in Worcester’s Bhutanese Community $5,000
Alzheimer’s Association, Expansion of Alzheimer’s Care & Support Services $5,000
Anna Maria College, Fairlawn Nurse Scholars $7,500
Audio Journal, Operating Support $5,000
Becker College, Fairlawn Nurse Scholars $7,500
Bridge of Central Massachusetts, Recovery Treatment $8,000
Center for Health Impact, Community Health Workers $100,000
City of Worcester Division of Public Health, Academic Health Collaborative Planning $88,190
Community Health Connections, Pediatric Healthcare Screenings $12,500
Community Servings, Nutrition Program for Critically Ill People $9,000
Dismas House of Massachusetts, Prisoner Reentry Program $15,000
Elder Services of Worcester Area, Nutrition Program $7,500
Family Continuity, Recovery-to-Work Program $10,000
Family Health Center of Worcester, Dental Care for Low-income Adults & Children $25,000
Family Health Center of Worcester, Healthcare for Homeless Families $30,000
Genesis Club, Educational Supports and Young Adults $20,000
Growing Places Garden Project, Operating Support $4,000
Jeremiah’s Hospice, Nutrition Center $7,500
MCPHS University, Dental Hygiene Community Ambassador Program $10,000
NEADS (National Education for Assistance Dogs Services), Service Dog Training $9,500
New Hope, MJ Ledenham Center for Family Intervention $10,000
North Quabbin Citizen Advocacy, Operating Support $7,000
Pathways for Change, Medical Accompaniment $7,000
Pathways for Change, Sexual Assault Prevention & Survivor Services $10,000
Planned Parenthood League of Central Massachusetts, Get Real Teen Council $9,000
Quinsigamond Community College Foundation, Fairlawn Nurse Scholars $7,500
Rachel’s Table, Program Support $12,000
Regional Environmental Council, Operating Support $22,000
Reliant Medical Group Foundation, Transportation Assistance $5,000
Southeast Asian Coalition of Central Massachusetts, Healthcare Access Refugees, Immigrants and Low-income Residents $15,000
Spectrum Health Systems, Recovery Support Program $15,000
Tri-Valley, Nutrition Programs for Seniors $10,000
University of Massachusetts Medical School, Pediatric Medical Training for Neurodevelopmental Disorders $60,000
Veterans, Inc., Independence Hall Treatment Center $12,500
Veterans, Inc., Post 9/11 Peer Specialist Outreach $18,500
Worcester State Foundation, Fairlawn Nurse Scholars $7,500
Worcester State Foundation, STEM Center’s Workforce Preparation Support $70,527
YWCA of Central Massachusetts, Domestic Violence Services $20,000

YOUTH DEVELOPMENT AND EDUCATION: HELPING YOUNG PEOPLE OVERCOME BARRIERS TO SUCCESS IN EDUCATION, WORK, AND LIFE.

African Community Education Program, Youth Academic & Support $24,000
Angels-Net Foundation, S.C.O.R.E. Summer Program $5,000
Appalachian Mountain Club, Youth Opportunities Worcester Summit Site $5,000
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<thead>
<tr>
<th>Organization</th>
<th>Program/Project</th>
<th>Funding</th>
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<td>Auburn Youth and Family Services, Operating Support</td>
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<td>Barton Center for Diabetes Education, Camperships</td>
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<td>Best Buddies Massachusetts, School Friendship Programs in Worcester County</td>
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<td>Big Brothers/Big Sisters of Central Mass/MetroWest, Worcester County Mentoring</td>
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<td>Blackstone Valley Boys &amp; Girls Club, Summer Camperships</td>
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<td>Bottom Line, Worcester Access Programs</td>
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<td>Bridge of Central Massachusetts, Safe Homes Operating Support</td>
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<td>Camp Putnam, Camperships for Worcester Children</td>
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<td>Center for Nonviolent Solutions, Peer Mediation &amp; Peacebuilding Program</td>
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<td>Family Health Center of Worcester, Positive Directions Summer Program</td>
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<td>Friendly House, Summer Gym &amp; Swim</td>
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<td>Girl Scouts of Central and Western Massachusetts, It's A Girl's World</td>
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<td>House of Peace and Education, HOPE Summer Camp</td>
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<td>Let's Get Ready, Worcester College Access Program</td>
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<td>LUK Crisis Center, Mentoring Program</td>
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<td>Montachusett Opportunity Council, Homework Help Center at Green Acres</td>
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<td>Rise Above Foundation, Activities for Foster Youth</td>
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<td>South High Community School, Youth Leadership through Philanthropy</td>
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<td>StandUp for Kids Worcester, Operating Support</td>
<td>$5,000</td>
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<tr>
<td>Straight Ahead Ministries, Youth Re-entry &amp; Straight2Work Program</td>
<td>$15,000</td>
<td></td>
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<tr>
<td>UMass Memorial Foundation, Youth Violence Prevention</td>
<td>$10,000</td>
<td></td>
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<tr>
<td>Valley Residents for Improvement, Lakeside Summer Camp</td>
<td>$36,000</td>
<td></td>
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<tr>
<td>Whitin Memorial Community Association, Youth Outreach</td>
<td>$10,000</td>
<td></td>
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<tr>
<td>Worcester Community Action Council, YouthWorks Year-Round &amp; Summer Jobs</td>
<td>$20,000</td>
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<tr>
<td>Worcester Education Collaborative, Operating Support</td>
<td>$12,500</td>
<td></td>
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<tr>
<td>Worcester Interfaith, Summer Jobs for Youth</td>
<td>$15,000</td>
<td></td>
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<tr>
<td>Worcester Public Library Foundation, Summer Reading</td>
<td>$5,000</td>
<td></td>
</tr>
<tr>
<td>Worcester Youth Center, Operating Support</td>
<td>$15,000</td>
<td></td>
</tr>
<tr>
<td>Worcester Youth Center, Violence Prevention Outreach</td>
<td>$20,000</td>
<td></td>
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<tr>
<td>YMCA of Central Massachusetts, Minority Achievers</td>
<td>$10,000</td>
<td></td>
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<tr>
<td>YMCA of Central Massachusetts, Summer PLAY</td>
<td>$22,000</td>
<td></td>
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<tr>
<td>Y.O.U. Inc., Pregnant and Parenting Teen Program</td>
<td>$18,000</td>
<td></td>
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<tr>
<td>Y.O.U. Inc., YouthConnect Summer</td>
<td>$15,000</td>
<td></td>
</tr>
<tr>
<td>Youth Connect, Summer Programs</td>
<td>$18,000</td>
<td></td>
</tr>
<tr>
<td>YWCA of Central Massachusetts, Girls CHOICE</td>
<td>$10,000</td>
<td></td>
</tr>
</tbody>
</table>
FOR MORE THAN 40 YEARS, individuals, families, and organizations have relied on the Foundation to manage their charitable giving through named funds. Each fund is defined by the donor in consultation with the Foundation at the time the fund is created.

Below is a listing of the Named Funds of the Foundation, followed by the year created.

**DISCRETIONARY & FIELD OF INTEREST FUNDS** ALLOW THE FOUNDATION TO MAKE GRANTS IN RESPONSE 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)
Cancer Care and Research Fund (1991)
**William R. and Janet A. Carrick Discretionary Fund (2016)** NEW
Central Massachusetts Health Standards Fund (1990)
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)
Sarah B. and Dix F. Davis Fund (2002)
Directors and Corporators Community Impact Fund (2007)
Eliza D. and Cora J. D. Dodge Fund (1985)
EMC Community Fund (2000)
Fairlawn Foundation Fund (1991)
Fallon/OrNda Community Health Fund (1996)
Marion Stoddard Fletcher Fund (1992)
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)
Rosemary Marble Harris Fund (2001)
Orville Harrold Fund (2006)
Harriet Miller Hight Education Fund with the Association of Colored Peoples (1982)
Dr. Leon, Arax and Sona Husisian Fund
(2016) NEW
Jeppson Memorial Community Fund (1976)
Jiji’s Fund (1999)
Lund Pioneer Fund (2010)
Main South Fund (1999)
Frances F. Mansfield Discretionary Fund (1996)
Barbara S. Markey Fund (2000)
Micah Housing Corporation Fund (1981)
Marc Needleman Memorial 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)

William R. and Janet A. Carrick Discretionary Fund
Bill and Janet Carrick brought joy and verve to all their endeavors, including their 57 years of marriage. Raised within five miles of each other, they met while at college. Bill, Yale ’49, spent his boyhood in East Douglas. Janet, Connecticut College ’48, was raised in Whitinsville, where Bill’s grandfather was postmaster.
Licensed pilots, the couple enjoyed criss-crossing North America in their Cessna 182 Skylane. Bill worked in his father’s business, the Carrick Agency in Worcester, while launching a company that Janet successfully ran for him. They also spent years in Chicago and London and in 1992, retired in Holden. They vigorously supported Worcester’s cultural institutions and volunteered in programs serving children and elders.
Bill served on the Foundation’s Investment Committee and with Janet created a donor advised fund. Bill also served on the Carrick Foundation Scholarship Fund for college-bound students from Douglas and nearby towns. Although Janet died in 2006 and Bill passed away this year, through their funds, they continue to benefit their community.

Dr. Leon, Arax and Sona Husisian Fund
Born in New York City, Sona Husisian (1924 – 2016) made Worcester her home after graduating from Boston University. Sona worked for 45 years as a trust executive assistant at the former Mechanics Bank and at the same time cultivated a rich life as an active participant in Worcester’s cultural and philanthropic institutions.
A devoted supporter of the YWCA, the United Way, and Holy Trinity Armenian Apostolic Church, Sona was also a beloved, long-serving volunteer at Mechanics Hall and an enthusiastic member of Music Worcester, Tower Hill Botanical Gardens, the Worcester Historical Museum and the Worcester Art Museum.
With foresight, two decades ago, Sona joined the Foundation’s Acorn Society and created a bequest that, upon her death, would continue supporting her cherished community and its cultural resources in perpetuity. Sona’s bequest establishes this field of interest fund dedicated to the arts, humanities and sciences and honors her parents, immigrants who fled their homeland during the Armenian Genocide.
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)

**DISCRETIONARY & FIELD OF INTEREST FUNDS MARKET VALUE:** $62.90 MILLION

**DONOR ADVISED FUNDS** ALLOW THE DONOR TO MAKE GRANT SUGGESTIONS AT THEIR CONVENIENCE TO ORGANIZATIONS THAT MATTER TO THEM.

Rosalind Lee and Victor Ambros Fund (2014)
Elkanah B. Atkinson Community Education Fund (1986)
Auburn Foundation (2002)
Bartholomew and 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)
**Eleanor Laing Clifford Fund** (2016) **NEW**
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) **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)
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)
Frances M. Herron Fund (1997)
J and J Fund (2014)
Jeppson Memorial Fund for Brookfield (1976)
Ken and Pat Jones Family Fund (2014)
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)
MacLean Family Fund (2004)
Donald J. and Tina Mancini Family Fund (2014)
Marla Maykel Fund (2001)
C. Jean and Myles McDonough Fund (1988)
Winifred Meany Killay and Matthew Meany Memorial Fund (2003)
Lucille Alma Flynn Fund

In August, Lucille Flynn celebrated her 96th birthday with her eight children, her grandchildren and great-grandchildren. Many had travelled far to join Lucille, who lives near their childhood home in Shrewsbury. A close family, they have been inspired by Lucille’s example to lead rich lives at home and in their communities.

A music major at Manhattanville College, Lucille was soon raising her children on her own while her pilot husband served in the Aleutian Islands. After the war, the family settled in Shrewsbury, where Lucille studied nutrition and interior design and earned her own pilot’s license.

A liturgical music scholar, Lucille served for 20 years as organist of St. Benedict’s Abbey in Stillwater. On her birthday, her family presented Lucille with a special gift: a named fund that will benefit students at the Abbey.

“Mom is thrilled,” says Mary Lou Faddick, Lucille’s oldest child. “This fund honors her good and beautiful life. Through its grants, she will influence even more young people.”

Eleanor Laing Clifford Fund

Eleanor Laing Clifford (1942–2016) brought extraordinary intelligence, spirit and heart to all her endeavors and contributed greatly to her community, profession and family.

Born and raised in Worcester, Eleanor graduated from the Boston College School of Nursing in 1966 and joined Paul Revere Life Insurance Company, where over a long and distinguished career she advanced the field of disability income insurance and mentored many colleagues and employees. When Eleanor retired, she was Vice President Integrated Underwriting Practice for the merged company of Unum.

Eleanor served on the boards of the Worcester Historical Museum, Edward Street Day Care, Worcester City Manager’s Advisory Board on Community Development, Worcester Housing Partnership, and Worcester Against Hunger Consortium. While on the board of the United Way of Central Massachusetts, she was a founding member of the Woman’s Initiative, a mentoring and leadership program for girls.

“Eleanor’s view of the world was enduringly hopeful,” says her sister, Elizabeth Clifford, who created this donor advised fund. “She gave much to her community. Eleanor will keep giving through this fund.”

PENTA Legacy Fund

Raised in a family that values both enterprise and giving back, Deborah Penta stayed faithful to her family values when she moved from Connecticut to Massachusetts 30 years ago.

Her business, a marketing firm, has a longstanding tradition of charitable giving, from supporting children’s charities and scholarships to providing pro-bono services. This year, Deborah created a donor advised fund for her personal philanthropy.

“The Foundation takes care of administering the fund,” says Deborah, “freeing me to do what I enjoy, which is to seek out meaningful ways to contribute and make our beautiful region better for others.”

With interests that include education, the arts, and programs benefiting women and families, Deborah values the freedom to address evolving opportunities with her fund.

“This is my legacy fund,” continues Deborah. “My son is now in high school. Years from now, he and in turn his children can use this fund to make their own grantmaking decisions based on the needs of their time. Life is an adventure. And so is philanthropy.”
Metzger Family Fund (2010)
Mitra Family Joy Guru Fund (2013)
Barrett and Mahroo Morgan Donor Advised Fund (2008)
John M. Nelson Fund (1990)
Nunley Family Fund (2013)
Pakahochag Church Fund for Human Understanding (1999)
PEACE Fund (2014)
PENTA Legacy Fund (2016)
Town of Petersham Fund (1984)
Pitcher Family Fund (2014)
Matthew Pollini Memorial Fund (2014)
Practical Education Fund (2010)
Pyle Fund (1986)
Rawji Conservation Fund (2013)
Dan Salmon Fund (2015)
Salois Family Fund (2010)
SASA Fund (2011)
Charles E. Scott Community Fund (1997)
Stonewall Fund (2008)
Margaret and Gordon Torgersen Fund (2000)
Traina Family Youth Development Fund (1999)
Trust in Kids Fund (1987)
Amos E. and Ann Laura Wasgatt Fund (1997)
Barbara Wasgatt Memorial Fund (2015)
Meredith D. Wesby Founders Fund (2012)
Courtney C. Wesby Founders Fund (2012)
Todd H. Wetzel Fund (1992)
Whittier Family Charitable Gift Fund (2007)
Worcester County Food Bank Fund to End Hunger (2011)
Worcester Postal Credit Union Charitable Fund (2014)
Youth for Community Improvement Endowment Fund (2001)

DONOR ADVISED FUNDS MARKET VALUE: $20.50 MILLION

SCHOLARSHIP FUNDS SUPPORT POST-SECONDARY EDUCATION OF HIGH SCHOOL GRADUATES.

Richard and Jeanne Ahlquist Community Service Scholarship Fund (2015)
Wallace D. and Dorothy M. Andrews Scholarship Fund (2011)
Adolfo Arrastia Beacon of Light Scholarship Fund (2005)
Helen and Chuck Arsenault Memorial Scholarship Fund (2000)
Auburn Woman’s Club Fund (2000)
AVID North Scholarship Fund (2004)
Dennis Elroy Barry Memorial Scholarship Fund (2005)
Belmont Street Community School Scholarship Fund (2000)
Loretta J. Belval Scholarship Fund (2002)
Bruce S. Bennett Fund for Community Journalism (2006)
Mary Ann Binkoski Scholarship Fund (2011)
Patricia A. and Robert M. Bourke Memorial Scholarship Fund (2014)
Mary and John Buckley Memorial Educational Fund (1998)
Catherine Burgholzer Memorial Scholarship Fund (2014)
Edward Carien Scholarship Fund (2010)
Carrick Foundation Scholarship (2000)
Chariton PTO Fund (1999)
Class of Tomorrow Scholarship Fund (2012)
Mary Connolly Memorial Scholarship Fund (1999)
Robert P. Currie Scholarship Fund (2013)
Melvin S. Cutler Fund (1986)
Kelly A. Davis Memorial Scholarship Fund (2014)
December 3rd Scholarship Fund (1999)
Admiral and Mrs. Louis E. Denfeld Scholarship Fund (2007)
Santo J. and Ellen M. DiDonato Memorial Scholarship Fund (1999)
Steve Drawbridge Memorial Fund (2008)
Richard and Carol Dymek Scholarship Fund (2006)
East Brookfield Scholarship Fund (2007)
Jeffrey S. Edinberg Memorial Scholarship Fund (2002)
Elm Park Community School Scholarship Fund (1987)
Emanuel’s Empowerment Fund (2012)
Fred and Leona Eppinger Scholarship Fund (2007)
Fairlawn Foundation Scholarship (1997)
Mary R. Fedeli Memorial Scholarship Fund (2002)
Anita and Nathaniel A. Feingold Scholarship Fund (1994)
Norma and Saul F. Feingold Fund (1983)
Since 1976, Emmanuel Baptist Church has resided in an historic red brick building in the Main South neighborhood of Worcester. Its founder and Pastor Emeritus, Reverend Richard Wright, retired in 2013 after serving the congregation for 37 years together with his wife, Sister Shirley Wright.

The couple created many services, including childcare and after-school programs, and in 1999 they were co-recipients of the Worcester Telegram & Gazette’s Isaiah Thomas Citizen of the Year Award.

“What continues to motivate us is to help young people in Main South move forward,” says Rev. Wright. “With this scholarship, we can build a legacy that lasts beyond our own lives.”

“Education empowers people with the tools to benefit themselves and society as a whole,” says Mrs. Wright, a retired teacher. “But many cannot access college without help. I was one of eight children and the first in my family to attend four-year college. My church gave me a scholarship. Now, we can assist others and continue to have an impact on our congregation.”
Claudia Simonian Scholarship Fund (2007)
Arthur J. Smith and Dorothy G. Smith Scholarship Fund (2005)
Francine “Doc” Smith Scholarship Fund (2013)
Thurston E. Solomon and Everett J. Morter Memorial 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)
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)
Rev. Richard and Shirley Wright Emmanuel Baptist Church Scholarship Fund (2016) NEW

**SCHOLARSHIP FUNDS MARKET VALUE:**
$13.22 MILLION

**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) NEW
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) NEW
Dr. and Mrs. Edward Budnitz Fund (1995)
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)
Martha A. Cowan Fund (1987)
Ethel S. Cunningham Fund (1987)
David L. and Elizabeth O. Dean Fund (2012)
Densmore Community Fund (2011)
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)
Marilyn M. and Russell S. Fox Scholarship Fund for Non-Traditional Students (2010)
Samuel Frank Designated Fund (1993)
Friends of Gale Free Library Designated Fund (2013)
Kimberly Lane Godard Memorial Fund (2012)
Lois B. and Robert F. Green Fund (2001)
Ginette Harrison, MD Memorial Fund (2002)
Hendricks House Preservation Fund (1999)
John and Frannie 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)
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)
Joan T. Barry Fund for Saint Mary School

Joan T. Barry retired in June 2016 after serving eight years as principal of Saint Mary School in Shrewsbury. “These have been the best eight years of my career,” says Joan, a Worcester native and Notre Dame Academy graduate who for 20 years was a public school teacher in Westchester County, New York. Joan then moved to Shrewsbury and for two decades held positions in public school administration.

Spanning pre-school through eighth grade, this Catholic school draws students from Saint Mary Parish and surrounding towns. “Students develop a strong sense of self,” says Joan, “and commitment to both academic excellence and service to others. They become lifelong learners and leaders.”

Joan will continue to advance Saint Mary’s through her designated fund. “This school is dear to my heart,” says Joan. “Every year, a grant can fund a new resource, such as an innovative technology or learning tool. And through the Foundation, this fund connects the school with the broader community.”

Brigham Hill Fund

A donor who wishes to remain anonymous created this designated fund to promote the protection of children from sexual abuse. Its grants will support the services and programs of Pathways for Change, Inc.

Based in Worcester and serving communities throughout Central Massachusetts, this nonprofit provides quality multicultural services to survivors of sexual violence and abuse as well as public education and advocacy to foster prevention.

Established in 1973 as one of the state’s first rape crisis centers, Pathways engages survivors in a healing journey that builds their resilience, strength, knowledge and awareness. Children can be silent victims, because their caregivers miss cues or fail to heed a child’s attempt to speak up.

“All children have the right to be safe in their homes, schools and neighborhoods,” says the donor. “Tools are available to teach children how to protect themselves and also to train parents in recognizing signs of sexual abuse. Children need to be believed. This fund will help Pathways for Change spread these resources to parents and communities.”
Timothy J. Houston Memorial Fund at Joy of Music

Attending the Joy of Music Program from age five through his teen years, Tim Houston became a skilled violin player. At age 11, wearing his prized raccoon-skin cap, Tim played fiddle tunes on a downtown Worcester street corner and raised $100, which he donated to an orphanage in Guatemala. In a thank you note, its director told Tim his gift fed all the children for an entire month.

Tim loved to play spontaneously anywhere, everywhere, and for everyone. “He discovered that the joy he found in music could touch other people,” says Wendy Ardizzone, the school’s founding director. “He cared about other people. He was a very bright light.”

Recently, Tim struggled with addiction. In August 2015, at age 23, he died from an accidental opioid overdose. Devastated, his loved ones found consolation by contributing to financial aid at Joy of Music, which created an endowed fund in his name.

“This fund honors Tim in a lasting way,” says Wendy. “It keeps Tim in the present with us, still bringing joy to others through music.”

Last Green Valley Fund

The “last green valley” is an 1,100-square mile swath of northeastern Connecticut and south-central Massachusetts with an abundance of forests and cultural resources. Encompassing 35 towns, including nine in Massachusetts, the region was designated a National Heritage Corridor in 1994 by the US Congress.

The grassroots group that spearheaded this process then formed a nonprofit dedicated to preserving the region for generations to come. Headquartered in Danielson, CT, The Last Green Valley, Inc., has created an agency fund with the Foundation.

“This endowed fund is an important step to becoming sustainable into the future,” says Lois Bruinooge, the nonprofit’s executive director, who first learned of the Foundation by attending its Nonprofit Support Center workshops.

“These sessions were excellent,” says Lois. “Now, by partnering with the foundation, we will broaden our visibility and benefit from your superb fund management and large asset pool, which will increase our returns. And your services enable us to offer our donors more sophisticated planned giving options and secure larger gifts.”

DESIGNATED FUNDS MARKET VALUE: $23.70 MILLION

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)
Boston Chinatown Neighborhood Center, Inc. Agency Funds (2011)
Quinsigamond Community College Foundation Inc. Endowment Funds

With such cutting-edge resources as its Healthcare and Workforce Development Center and new Quinsigamond Engineering, Science, and Technology (QuEST) Center, Quinsigamond Community College (QCC) provides quality, cost-effective education that changes lives.

Advancing this mission is the QCC Foundation, which has created the QCC Foundation Scholarship Endowment Fund and the QCC Foundation Endowment Fund.

“State colleges only receive a fraction of their funding from the Commonwealth,” says QCC Foundation President Maurice “Moe” Boisvert. “Most comes from tuition and private sources. We’ve placed our funds within our community foundation’s endowment, where they can grow and earn higher return. We encourage the entire community to take part in our mission by investing in the college or creating a named scholarship.”

As founding president and CEO of Youth Opportunities Upheld Inc., from 1971 to 2011, Moe has seen the power of the college to change lives. “Here, students develop the tools to fulfill the American dream. They gain good jobs or move on to four-year colleges.”

Music Worcester Education Fund

Music students in Worcester Public Schools get to learn and perform with renowned musicians, thanks to outreach programs of Music Worcester, Inc.

This past season, the conductor and concertmaster of the Polish-Baltic Philharmonic coached Burncoat High School musicians, who then attended the orchestra’s performance at Mechanics Hall with their families. Each year, South High students are paired with members of The Worcester Chorus. They rehearse with their mentors and in December perform the Messiah side by side with the Chorus.

“We want to bring these opportunities to other schools,” says Adrien Finlay, executive director of Music Worcester. “Grants from the Foundation have been critical to expanding these programs. With our new agency fund, we can generate funds to continue expanding these programs now and long term.”

Acclaimed pianist Simone Dinnerstein visited the Worcester Arts Magnet Elementary School with her “BachPacking to School” program, which she developed for her son’s public school in Brooklyn. “It’s fantastic,” says Adrien. “Kids take a journey through Bach, the father of western music.”

Boylston Public Library Foundation Fund (2014)
Boys & Girls Club of Worcester Fund (2008)
Camp Putnam Agency Fund (2011)
Dynasty Fund (1997)
Elm Park Center for Early Childhood Education Scholarship Fund (2006)
Lois S. Feldman Fund (1990)
Friends of Beaman Memorial Public Library Endowment Fund (2011)
Friends of Northbridge Elders Fund (1997)
Friends of Hope Cemetery Fund (2011)
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) NEW
Jane Fund of Central Massachusetts Fund (2008)
Last Green Valley Fund (2016) NEW
Latin American Health Alliance of Central Massachusetts Fund (2010)
Priscilla Mason Endowment Fund (2014)
Master Singers of Worcester Fund (2007)
Matthew 25 Funds (2000)

Music Worcester Education Fund

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Acclaimed pianist Simone Dinnerstein visited the Worcester Arts Magnet Elementary School with her “BachPacking to School” program, which she developed for her son’s public school in Brooklyn. “It’s fantastic,” says Adrien. “Kids take a journey through Bach, the father of western music.”
PLANNING A LEGACY OF JOY

This year, PAMELA AND MAURICE ("MOE") BOISVERT celebrate their 50th wedding anniversary. Their lifetime of shared joys includes their four daughters, 12 grandchildren and the joy they find in giving. Through a bequest with the Foundation, they will continue sharing this joy with their family and community for generations to come.

In their bequest, Moe and Pamela devote a percentage of their liquid assets to causes that have shaped their careers.

The bequest will direct half of the assets to educational programs serving low-income youth and adults. “My whole career has been about increasing opportunities for marginalized individuals to succeed in school and then in a career,” says Pamela, CEO of Massachusetts Education & Career Opportunities, Inc. (MassEdCO), a Foundation grantee.

Half of the assets will fund projects at Youth Opportunities Upheld, Inc., a nonprofit that Moe founded and led for 40 years as CEO. “YOU, Inc. helps traumatized, abused, and neglected youth heal, move on, and build a brighter future,” says Moe, the 2008 recipient of the Foundation’s Renaissance Award, which honors exemplary nonprofit leaders.

Pamela and Moe trust the Foundation to make the most of their legacy. “I’ve always been impressed with the great care that the Foundation puts into ensuring that donors’ money achieves the best possible impact,” says Pamela, who served on the Foundation board and chaired its Distribution Committee. “And by pooling donor funds within a large, well managed endowment, the Foundation does an excellent job of earning the best return on investment,” says Moe, who has set up two agency funds with the Foundation.

“We feel so blessed to live in this community,” says Moe. “It’s been a terrific home for us and our children. We enjoy working to make it even better and stronger.”

“Our children have already seen how important giving is to us,” says Pamela. “Now, we want to involve our grandchildren.” Two will join Pamela and Moe as they visit a school they helped to start in Kenya. The children are now raising money to purchase a cow for the school.

“Leaving all you have to your family is a good legacy,” says Pamela. “But leaving a percentage to the community is a better legacy. Your example will have a very positive impact on your family. You’re creating new philanthropists!”

“Giving makes you feel really good,” adds Moe. “So do it!”

Millbury Public Library Endowment Fund (1991)
Music Worcester Education Fund (2016) NEW
National Memorial Trust Fund (1990)
Preservation Worcester Endowment Fund (2011)
Quinsigamond Community College Foundation Inc. Endowment Funds (2016) NEW
Rural Cemetery Fund (2006)
St. Mary’s Assumption Albanian Orthodox Church Endowment Fund (2012)
Straight Ahead Ministries Fund (2015)
Tatnuck Brook Watershed Fund (1996)
Temple Emanuel Sinai Fund (2007)
United Way of Central Massachusetts Fund (1987)
West Boylston Historical Society Fund (2014)
Women’s Initiative Fund in Honor of Lois B. Green (2009)
Worcester Area Association for the Education of Young Children Fund (1998)
Worcester Chamber Music Society Fund (2013)
Worcester County Poetry Association Funds (2002)
Worcester Jewish Community Center Fund (2010)
Youth Opportunities Upheld, Inc. Fund (1987)

AGENCY FUNDS MARKET VALUE: $18.08 MILLION
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 special 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.

---

**2016 Members**

Anonymous (8)
James C. and Colleen S. Abrams
Robert S. Adler
Ann Bergman and Bill Glennon
Edward W. Bettke
Mark P. Bilotta and Henry O. Ritter
Brian L. and Betty G. Bjurling
Maurice J. and Pamela K. Boisvert
Cushing C. Bozenhard*
Michael D. and Mary Ann S. Brockelman
James R. and Paula R. Buonomo
Kenneth F. and Nancy Candito
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
Forrest A.* and Shirley H. Jacobs
M Howard and Frances Jacobson
Kenneth R. and Patricia L. Jones
Sarah Lange
David P. Leach and Audrey Klein-Leach
Catherine H. Levine
Margaret D. Lincoln
Ann T. Lisi
Monica Escobar Lowell
C. Jean McDonough
Satya B. and Supriya Mitra
Raymond E. and Barbara B. Morin
Frederic H. and Victoria Mulligan
Linda C. Nelson
Karen M. Nunley
Vincent J. Osterman
Arthur M.* and Martha R. Pappas
Philip L. and Marsha R. 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
C. Reid and Susan Roberts
Linda Carlson Romano
Scott and Lois Rossiter
Paul 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.
Margaret Wolcott
David K. Woodbury
Kimball R. Woodbury

* Deceased

“Leaving all you have to your family is a good legacy. But leaving a percentage to the community is a better legacy.”

Pamela Boisvert
Contributors

We list those who contributed $2,500 or more during 2016 and extend our sincere gratitude to all who made a gift during the year.

$1,000,000 +
Quinsigamond Community College Foundation
Worcester Historical Museum

$100,000 – $999,999
Estate of Isabel K. Arms
Janet Carrick Residuary Trust
Kirby Foundation
Latin American Health Alliance
Metz Family Foundation
Straight Ahead Ministries

$50,000 – $99,999
Emmanuel Baptist Church
Estate of Sona Husisian
Last Green Valley
Music Worcester

$10,000 – $49,999
Anonymous (1)
Abby’s House
John and Ann Marie Argitis
Ned W. and Elizabeth A. Bacon
Bartholomew and Company, Inc.
Shaun M. Bennett
Carrick Foundation
Elizabeth Clifford
Carolyn S. Crane
Estate of Harriet K. Crawford
Digital Federal Credit Union
Barbara M. Fitts
Warner S. and Mary F. Fletcher
Joseph A. Ha
InterGlobal Communication Group
Robert D. Johnson
Elinor B. Keil
Liberty Movers, Inc.
B. Dale and Melanie Magee
Donald J. and Tina M. Mancini
Mildred H. McEvoy Foundation
Middlesex Savings Charitable Foundation
Deborah A. Penta
Peter Metz and Phyllis Pollack
Paul and Fay Rossley
Dan Salmon Fund
Joe and Joanne Salois
St. Mary’s Assumption Albanian Orthodox Church
Unum Group Matching Gift Program

$5,000 – $9,999
Boylston Graduates Association
CSX Transportation, Inc.
Cutler Charitable Foundation
Henry B. and Jane K. Dewey
Edwin and Peggy Fedeli
Allen W. Fletcher
Kevin M. Flynn
Joy of Music Program
Annie Eppinger Kleva
Lionel M. and Cynthia E. Lamoureux
National Grid
Stephen and Cynthia N. Pitcher
West Boylston Historical Society
Worcester County Poetry Association

$2,500 – $4,999
Edward W. Bettke
Ross K. and Lisa F. Dik
Mary Lou Faddick
Fels Family Foundation
Barbara H. Gaudette
Hanover Insurance Group
Mildred H. McEvoy Foundation
Deborah A. Penta
Paul and Fay Rossley
Dan Salmon Fund
Joseph A. Ha
InterGlobal Communication Group
Robert D. Johnson
Elinor B. Keil
Liberty Movers, Inc.
B. Dale and Melanie Magee
Donald J. and Tina M. Mancini
Mildred H. McEvoy Foundation
Middlesex Savings Charitable Foundation
Deborah A. Penta
Peter Metz and Phyllis Pollack
Paul and Fay Rossley
Dan Salmon Fund
Joe and Joanne Salois
St. Mary’s Assumption Albanian Orthodox Church
Unum Group Matching Gift Program

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

Investment Committee
The Foundation’s Investment Committee is comprised of financial experts from the community; it establishes policy, hires investment managers, and evaluates performance. The Committee is supported by independent investment consultants Prime Buchholz & Associates, which provides technical assistance, manager selection, and ongoing evaluation.

2016 Members
Timothy M. Jarry Chair
Robert S. Adler
Thomas J. Bartholomew
J. Christopher Collins
James E. Collins
Dix F. Davis
Warner S. Fletcher
Abraham W. Haddad
Jeffrey S. Solomon

Portfolio (at 12/31/16)
- Domestic Equity 19%
  2 managers
- International Equity 28%
  6 managers
- Flexible Capital 30%
  4 managers
- Fixed Income 17%
  4 managers
- Real Assets 5%
  2 managers
- Cash 1%

SUMMARY FINANCIAL STATEMENTS (Years ended December 31, 2016 and 2015)

<table>
<thead>
<tr>
<th></th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>$ 139,803,842</td>
<td>$ 135,246,233</td>
</tr>
<tr>
<td>Operating Cash</td>
<td>$ 167,094</td>
<td>$ 169,680</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$ 179,410</td>
<td>$ 157,391</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$ 140,150,346</td>
<td>$ 135,573,304</td>
</tr>
<tr>
<td><strong>Liabilities and Net Assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable &amp; Accrued Expenses</td>
<td>$ 115,525</td>
<td>$ 96,123</td>
</tr>
<tr>
<td>Split Interest Funds (Charitable Gift Annuities, other)</td>
<td>$ 817,246</td>
<td>$ 886,771</td>
</tr>
<tr>
<td>Net Assets</td>
<td>$ 139,217,575</td>
<td>$ 134,590,410</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td>$ 140,150,346</td>
<td>$ 135,573,304</td>
</tr>
<tr>
<td><strong>Revenues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$ 5,741,810</td>
<td>$ 6,004,353</td>
</tr>
<tr>
<td>Net Investment Returns</td>
<td>$ 7,060,506</td>
<td>$(2,017,977)</td>
</tr>
<tr>
<td>Other</td>
<td>$ 99,994</td>
<td>$ 127,488</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td>$ 12,902,310</td>
<td>$ 4,113,864</td>
</tr>
<tr>
<td><strong>Grants &amp; Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>$ 6,614,110</td>
<td>$ 5,743,209</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>$ 1,661,035</td>
<td>$ 1,514,793</td>
</tr>
<tr>
<td><strong>TOTAL GRANTS &amp; EXPENSES</strong></td>
<td>$ 8,275,145</td>
<td>$ 7,258,002</td>
</tr>
<tr>
<td><strong>CHANGE IN NET ASSETS</strong></td>
<td>$ 4,627,165</td>
<td>$(3,144,138)</td>
</tr>
<tr>
<td><strong>NET ASSETS, Beginning of Year</strong></td>
<td>$ 134,590,410</td>
<td>$ 137,734,548</td>
</tr>
<tr>
<td><strong>NET ASSETS, End of Year</strong></td>
<td>$ 139,217,575</td>
<td>$ 134,590,410</td>
</tr>
</tbody>
</table>

The audit of the Foundation’s financial statement as of and for the years ending December 31, 2016 and 2015 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.
Richard Burke
John H. Budd
Paula A. Brouillette
Denise Brotherton
Denise H. Brookhouse
Michael D. Brockelman
James B. Broadhurst
Kevin L. Bradley
Sarah Ann Bowditch
James Bonds Sr.
Pamela K. Boisvert
Maurice J. Boisvert
Colleen Abrams
Robert S. Adler
Robb B. Ahlqquist
Kola Akindele
Maria A. Allard
Robert J. Anderson
James A. Andreoli
David P. Angel
Roy Angel
Michael P. Angelini
Ann Marie Argitis
Joycelyn Augustus
Abigail Averbach
Robert S. Bachelder
Joseph J. Bafaro Jr.
Richard C. Barry
Thomas J. Bartholomew
John E. Bassett
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Harry T. Whitin
Meridith D. Wesby
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Wyatt R. Wade
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Victoria Waterman
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James A. Welu
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Todd H. Wetzel
David White
Harry T. Whitin
Thomas J. Wickstrom
Michael Wilcox
Jack L. Wolfson
David K. Woodbury
Janice B. Yost
Alex Zequeira
Kelsa L. Zereski
Robert J. Zibinski
Tina Zlody
Valerie Zolezzi-Wyndham

* Deceased
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CHAIR  
President & CEO, Stop Loss Insurance Services

Warner S. Fletcher  
VICE CHAIR  
Director, Fletcher Tilton

Timothy M. Jarry  
TREASURER  
Chief Investment Officer, College of the Holy Cross

Carolyn J. Stempler  
CLERK  
President, Carolyn & June Designs

Joycelyn C. Augustus  
Financial Consultant

Jennifer Davis Carey  
Executive Director, Worcester Education Collaborative

Matilde Castiel  
Commissioner of Health & Human Services, City of Worcester

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Senior Vice President, Southbridge Savings Bank (retired)

J. Christopher Collins  
Of Counsel, Mirick O’Connell

Tracy A. Craig  
Partner, Mirick O’Connell

Jack L. Foley  
Vice President, Government & Community Affairs, Clark University

Alison C. Kenary  
Community Volunteer

Patsy C. Lewis  
Nonprofit Consultant

Linda C. Loof  
Assistant Vice President for Government & Community Relations, WPI

Nadia T. McGourthy  
Attorney, Dresser & McGourthy, LLP

Satya B. Mitra  
President, The Guru Tax & Financial Services, Inc.

Ann K. Molloy  
Partner, Mountain, Dearborn & Whiting LLP

Hilda Ramirez  
Associate Director, Latino Education Institute

George W. Tetler III  
Partner, Bowditch & Dewey

Matthew E. Wally  
Vice President Government & Community Affairs, UniBank

Charles S. Weiss  
Director, Strategic Initiatives, College of the Holy Cross (retired)
BY CREATING A FUND with the Foundation, you improve your community in your own way—now and in perpetuity.

Philanthropy can be a complex endeavor. The Foundation’s comprehensive planning and administrative services and deep knowledge of the community and its needs can help you achieve the most impact with your charitable investment.

Your fund fulfills your intentions, generating grants year after year while its principal grows as part of the Foundation’s strong, well-managed endowment. As a result, you extend the value and reach of your philanthropy.

And as a Foundation donor, you have the opportunity to take part in events that explore current and emerging issues in our community and volunteer on committees that review grant proposals and evaluate the progress of local programs.

Create a fund
Establish a fund by making a gift of $10,000 or more. Choose the type of fund that suits your interests:

**Designated Funds** support one or more organizations in perpetuity.

**Discretionary and Field of Interest Funds** allow the Foundation to make grants in response to pressing community needs.

**Donor Advised Funds** allow you to make grant suggestions at your convenience to organizations that matter to you.

**Scholarship Funds** support post-secondary education of high school graduates.

Make a planned gift
A planned gift can offer financial advantages now while securing your charitable legacy. The Foundation offers many planned giving options. For example, you can…

- Name the Foundation the beneficiary of a bequest, a trust, or a retirement fund
- Transfer a life insurance policy, making premium payments tax-deductible
- Donate real estate as a future gift while using the property throughout your lifetime
- Set up a charitable gift annuity to receive income now while benefiting your cause in perpetuity.

Contact us today at 508-755-0980 to find out how the Foundation can help you meet your philanthropic goals.

Leadership can take many forms, from practice tackling an imaginary foe to making a real difference in your community with your vision and fund.
Staff

Ann T. Lisi
President & CEO

Diane S. Allain
Accounting Officer

Jonathan Cohen
Program Officer

Christopher M. O’Keeffe
Vice President for Program

Mark Onanian
Finance Assistant

Beckley W. Schowalter
Scholarship Program Manager

Sarah Shugrue
Program Officer

Kelly A. Stimson
Director of Donor Services

Jasmine Vasquez-Okutoro
Administrative Assistant

Jacqueline L. Williams
Office 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.