The Power of More
The Foundation as a Catalyst for Connection

Greater Worcester Community Foundation 2014 Annual Report
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On the cover: We thank the staff and clientele from Central Massachusetts Housing Alliance, Girls Inc., Rainbow Childhood Development Center, and Regional Environmental Council, and Foundation donors whose faces on our cover portray community connections and the power of more.
Your Foundation begins its fifth decade with a fresh focus on fundamentals.

In 2014, the board reviewed all grantmaking over the past decade to determine arenas within which we can make a pivotal difference. With a mission to strengthen our community as a whole, the Foundation casts a wide net while addressing urgent needs in greater depth.

The Foundation has developed inroads of influence not only as a funder but also as a convener, advisor and, particularly through its Nonprofit Support Center, as an educator. Through these activities and more, the Foundation has built significant problem-solving capital, and will apply it to meet critical needs.

The board has embraced early childhood development as a top priority. What could be more important than providing a healthy start to the youngest among us? The Foundation will do all it can to ensure that well before kindergarten, children gain the tools to succeed in school and life. Our strategy will foster conditions that nurture families: access to healthy food and decent housing; integration of immigrants; and an informed citizenry that represents the community in all its diversity.

As a catalyst for connections, the Foundation is a force multiplier. This report shows you some of these networks at work. We bring the power of more to these endeavors – more relationships, reach, knowledge, and assets. These resources include our endowment, our grantmaking engine, which grows larger as a collective fund than it would as a sum of individual accounts.

Our donors build the power of more through their generosity, vision and imagination. Thank you for joining us in experiencing the joys of philanthropy as, together, we do more for our community.

Ann T. Lisi
President and CEO

Lee Gaudette
Chairman
2014 Highlights

ENDOWMENT REACHES ALL-TIME HIGH ALONG WITH GRANTMAKING
The Foundation endowment grew to $140 million in August for the first time in our 40-year history and our granting capacity increased steadily.

LEADERS TOP RECORDS WITH GIFTS
The Foundation’s Directors & Corporators Fund reached $1 million in 2014 thanks to more than $80,000 in unrestricted gifts from corporators to support operations.

NURTURING THE YOUNGEST AMONG US
After conducting a scan of local conditions for poor and low-income children, the Foundation formed a strategy to help young children develop the tools to succeed in school and life, including grants to support summer learning and early education.

The Foundation hosted Amy O’Leary of Strategies for Children as guest speaker at its 2014 annual meeting to promote the statewide Early Education for All campaign.

YOUTH FOR COMMUNITY IMPROVEMENT (YCI) GRANTS TOTAL $25,000
Engaging 15 students from eight local high schools, YCI awarded grants to eight nonprofits focused on mental health, drug education, and job training for youth.

BOARD AND STAFF DEVELOPMENT KEY FOR NONPROFIT SUPPORT CENTER
Emphasizing essentials, Nonprofit Support Center programs and services addressed effective board development, fundraising, and financial management as well as professional development for a wider range of job titles and new approaches to raising individual and team performance.

The Center sponsored the second edition of Valuing our Nonprofit Workforce, a compensation survey of Massachusetts and Rhode Island nonprofits published by Third Sector New England.

MORE SCHOLARSHIPS THAN EVER
More than 160 volunteers serving on 61 selection committees awarded 398 scholarships totaling $598,000, the highest number of awards and annual scholarship payout in the history of the Foundation, the largest community scholarship provider in Worcester County.

ALUMNI NETWORK GIVES BACK
Drawing 25 former scholarship recipients, the Alumni Network gained new members; held its first service activity and social events; and awarded its Class of Tomorrow Scholarship.
LEADERSHIP WORCESTER ENGAGES A NEW GENERATION
The Foundation partnered with the Worcester Regional Chamber of Commerce to re-launch Leadership Worcester, a program to engage promising new professionals in Greater Worcester’s civic life.

BUILDING A SINGLE SOURCE OF REGIONAL DATA
A Foundation grant is helping the Central Massachusetts Regional Planning Commission create the Greater Worcester Data Commons, a digital platform providing one comprehensive source of regional data with tools to easily view information.

TARGETING TRANSFER OF WEALTH
The Foundation commissioned the Center for Rural Entrepreneurship to estimate the household net worth and “transfer of wealth opportunity” from 2010 to 2020 for residents of Worcester County. Findings estimate the 2010 net worth of households as $180 billion ($594,200 per household) and project a likely transfer of $19 billion from these households to the next generation. Applying just five percent of this wealth to local philanthropy would yield $950 million to advance community good – a compelling opportunity that the Foundation will pursue.

GATHERINGS AND OUTREACH
The Foundation Forum convened on October 21 to hear a panel present Downtown Worcester: Yesterday, Today, and Tomorrow, an overview of a major redevelopment plan for the city.

More than 30 donors attended the Foundation’s annual Investment Luncheon on November 19, which included a presentation by investment consultant Jeffrey R. Croteau, managing principal of Prime Buchholz & Associates.

The Professional Advisors Network (PAN) annual Celebration of Philanthropy on June 19, a reception for PAN members and donors, featured a talk by philanthropy consultant Susan L. Axelrod.

Two Westborough donor families jointly hosted a peer event to introduce the Foundation to their friends and neighbors.

The Foundation’s new brochure, Giving for Impact, shows how donors partner with the Foundation to make a lasting difference in the community.

On August 6, a perfect summer evening, corporators and staff cheered as Mike Brockelman, Foundation president from 2002 to 2005, threw the first pitch at the season’s final home game of the Worcester Bravehearts.

More than 1,500 community members, including Worcester Sharks mascot “Finz,” rallied to raise in excess of $136,000 for local nonprofits during a one-day giving marathon on May 6, Greater Worcester GIVES.
A child’s first 1,000 days can profoundly affect its capacity for learning and growth. Supporting vulnerable parents and nurturing newborns and toddlers is the urgent business of these Foundation grantees – and the community as a whole.

Rainbow Childhood Development Center serves 300 children, from infants to 13-year-olds. Rainbow’s rich preschool program screens children to ensure that their cognitive, social, emotional and physical development has a firm foundation. “We facilitate children’s success,” says Joyce Rowell, executive director. “When they transition to public schools, the vast majority of our children do not require special services.”

Hands-on learning integrates language development, science, and the arts. Preschoolers tend raised-bed and hydroponic gardens, activities that reinforce lessons in nutrition and exercise.

Rainbow participates in the Master Teacher Program of Edward Street Child Services, which provides a teacher one day a week to five preschools serving low-income families. “The day focuses on whatever teachers request,” says Dianne Bruce, Edward Street’s executive director, “from sharing best practices in curriculum design to improving the dynamics of the classroom.”

The clients of Pernet Family Health Service include new immigrants and victims of domestic violence referred by the Department of Children and Families. Pernet trains parents in the basics of childcare and helps them secure stable housing, begin work and enroll in school. Its Early Intervention Program provides free screenings and therapy to toddlers at risk of developmental delay. Pernet also runs support groups for fathers at the Worcester County House of Corrections. “We connect parents with the skills and resources they need to help their children thrive,” says Executive Director Sheilah H. Dooley, RN.

Parents receive weekly home visits during their child’s first year. “Our founders were Catholic nuns who mastered the art of home visits, the gold standard of intervention,” says Sheila. “In the client’s home, we are guests, not authority figures. Parents trust us.”

Also harnessing the power of group support, the Family Health Center of Worcester offers its clients – primarily low-income families – a best-practice model of group prenatal care, CenteringPregnancy, pioneered by the Centering Healthcare Institute.

Sara Shields, MD, Family Health Center of Worcester’s attending faculty physician and a clinical professor at UMass Medical School, has made the program part of the residency in family medicine.

Meeting in small groups, women share problems and insights, improving outcomes for both mother and child. “Mutual support improves learning, reduces stress and empowers participants,” says Dr. Shields. “Some of these women are among our society’s most disenfranchised. Here, they speak for themselves and grow in confidence and competence.”
The Foundation and its partners are working to ensure a strong and healthy start for children during their pivotal first years.
Foundation grants and partnerships advance programs that empower people to gain stable, quality housing that is within their means.
A home is a place to secure life’s basics – shelter, food, rest and renewal. Yet safe and stable housing eludes many in Worcester, from the chronically homeless to wage earners unable to make mortgage payments. Homelessness is on the rise and foreclosures persist despite progress in reducing their frequency. Several Foundation grantees are working to help people find and keep decent housing.

Prevention is a proven strategy of the Central Massachusetts Housing Alliance, a leader in reducing family homelessness through direct services, public education and advocacy.

“Step one is to keep a family from entering a homeless shelter,” says Grace K. Carmark, executive director of the Alliance. “We find the resources to help people start a path to self-sufficiency.”

These resources may include cash assistance for rent, counseling to resolve disputes with landlords, and donations of household goods.

The Alliance’s partners in prevention include the Worcester Community Action Council as well as the Worcester County Continuum of Care, a network of service providers and faith-based, private sector and philanthropic organizations. “We provide a wraparound model of support, from job training to housing placement and long-term stabilization services,” says Grace. “Our rate of re-housing is among the highest in the state.”

In 2008, at the start of the foreclosure crisis, a group of volunteers formed the Worcester Anti-foreclosure Team, a grass roots program that seeks out and supports residents facing foreclosure.

“Of the 60 households we assisted last year, 57 avoided or deferred eviction,” says program manager Grace Ross, coordinator of the Massachusetts Alliance Against Predatory Lending. “We help people stay in homes longer or get their homes back. Most people are unaware of their legal rights. We’re at their doors with flyers and by their side at auctions. We meet biweekly with these families to share knowledge and support. Our work is about the power of people coming together.”

Among its services to current and aspiring homeowners, the NeighborWorks® HomeOwnership Center provides HUD-certified foreclosure counseling countywide. Its host, the Oak Hill Community Development Corporation, recently secured a state tax credit that offers incentives for developers and donors to fund upgraded housing in its target area: Union Hill. Forged through neighborhood meetings, the Oak Hill Neighborhood Stabilization Plan encompasses improved housing, green space, recreation, education and employment as well as better access to healthy food, medical services and transportation.

“By 2020, we anticipate increased home ownership and full occupancy of energy-efficient rental units,” says Executive Director Mullen Sawyer. “We’re engaging residents in making Union Hill a safer and more inviting neighborhood.”
Increasing Food Security

Marshalling public focus on food insecurity, in 2006, the Worcester Mayor’s Office convened the group that became the Worcester Food & Active Living Council, a coalition dedicated to fostering a healthier food system. Its change agenda engages health care providers, schools, elected officials, businesses, and social service agencies.

“We treat hunger as a public health issue,” says Jean McMurray, executive director of the Worcester Food Bank.

The region’s largest anti-hunger agency, the Food Bank distributes donated food through its network of 138 partners, mainly food pantries and community meal programs. The Food Bank also promotes sustainable solutions to hunger. “To become a hunger-free community,” says Jean, “we need strategies that address the root cause of food insecurity, poverty.”

The Food Bank supports promising solutions through its donor advised fund, the Worcester County Food Bank Fund to End Hunger. Grantees increase access to healthy food and good jobs.

The Food Bank’s largest source of fresh produce is the Community Harvest Project. In 2014, at its farm in North Grafton, 9,900 volunteers grew 135 tons of fruits and vegetables, all donated to hunger relief.

CHP also improves access to healthy food through education programs. Sprouting Minds brings hands-on learning in plant science, ecology and nutrition into schools. In the Farm to Health Center Initiative, a joint program with UMass Medical School, volunteers provide patients with produce, nutrition education, recipes, and guidance to local sources of fresh produce.

The Regional Environmental Council develops entrepreneurial programs that advance food justice. REC employs city teenagers at two urban farms, where they gain leadership skills as well as business acumen. Its farmers’ markets bring fresh produce to city neighborhoods. Hundreds of volunteers and 23 public schools take part in REC’s network of 62 community gardens. Now REC is partnering with the Worcester Regional Chamber of Commerce to make food security a countywide enterprise. In 2014, their joint proposal to plan a regional food hub won a Synergy grant from The Health Foundation of Central Massachusetts.

The plan capitalizes on existing resources within Central Massachusetts, which ranks sixth nationwide in direct farm sales to consumers. “Worcester is surrounded by towns with farms,” says REC Executive Director Steve Fischer. “A food hub that connects growers with distributors and consumers will increase access to healthy food as well as jobs. This is totally possible with collective effort.”

“No one organization can solve the problem of hunger,” says Jean McMurray. “A food hub that connects the many parts of the food system supports a sustainable solution.”

The Foundation: Harnessing the Power of More

A growing network of organizations and residents, including legions of volunteers, are striving to create a hunger-free community. They share with the Foundation a focus on addressing the root causes of hunger and poor nutrition. Foundation grants encourage innovative ventures, including projects that increase access to healthy food and create employment opportunities.
Regional Environmental Council enterprises to advance food justice include a joint plan with the Worcester Regional Chamber of Commerce to create a regional food hub.
Since the building of the Blackstone Canal, immigrants have contributed to Worcester’s prosperity and ethnic richness. As one of the state’s three designated refugee resettlement areas, Worcester welcomes newcomers from an increasingly diverse array of countries. Many have spent years in refugee camps.

The largest provider of refugee resettlement services in Worcester is Ascentria Care Alliance. Each year, its Services for New Americans program resettles about 300 refugees. Its Immigration Legal Assistance program assists more than 900 immigrants, including humanitarian cases such as asylum seekers.

Ascentria’s federally funded resettlement services begin when refugees arrive at the airport and continue for up to five years. “We support the employment and education of refugees as they work toward self-sufficiency,” says Jozefina Lantz, director, Services for New Americans. “The key is to get people working while they continue their longer-term integration into the community.” Among Ascentria’s services is its New Lands Farm program, which trains refugees to adapt home-country agricultural skills to local growing conditions and markets.

Collaborating to serve a larger and more diverse clientele, 30 nonprofits have formed the Welcoming Network for Refugees, which meets quarterly to share resources.

Members include the Family Health Center of Worcester, which delivers comprehensive primary care in more than 37 languages; and Community Legal Aid, whose free civil legal services help families meet their basic needs. The agency also advises nonprofits that serve immigrants.

Literacy Volunteers of Greater Worcester offers free instruction to English language learners. Its volunteers tutor more than 400 adults from 76 countries. “We’ve seen a shift in newcomers,” says Executive Director Ellen Benz. “Now a fourth of our clients are Arabic-speaking refugees from the Middle East and people fleeing hostilities in Bhutan, Burma and multiple African countries. We listen to what our clients need and respond with best practices.”

A new language lab enables learners to practice in privacy on tablets. Worcester Polytechnic Institute students devised a picture-based guide to the program that assists people who are unable to read as well as first-time computer users.

The Southeast Asian Coalition also serves an increasingly varied population. “Before, our clients were mainly from Vietnam,” says Executive Director Anh Vu Sawyer. “Now, we assist refugees who were enemies in their countries. At first, they requested separate classes. But our intergenerational activities are starting to relieve old hostilities.”

The Foundation: Bringing Newcomers into the Power of Community

The Foundation is a longstanding supporter of programs that help immigrants and refugees adapt to the community and become part of its economic and civic life.

Nonprofits provide proven services as well as trained volunteers who can ease a family’s first visit to a school or mentor an aspiring small business owner. Foundation grants and expertise increase the capacity of these programs, which help newcomers make their way.
In March 2015, more than 700 immigrants from 88 countries became citizens at a naturalization ceremony in Mechanics Hall.
Democracy is a participatory endeavor. Citizenship takes effort, skill and knowledge. Foundation grants and initiatives advance programs that develop informed citizens who represent the region in all its diversity.

As a vehicle for citizen-run philanthropy, the Foundation is a civic resource, engaging the community in its own betterment. Its Nonprofit Support Center develops leaders of nonprofits, increasing their effectiveness. Its Youth for Community Improvement program inspires future philanthropists by engaging high school students as grant makers. Leadership Worcester, its joint program with the Worcester Regional Chamber of Commerce, is preparing a cohort of volunteers new to civic leadership.

Youth empowerment is a priority of the Foundation. Grantees include Girls Inc., whose Leadership Academy pairs high school students with mentors, professional women at local companies such as Unum. Younger girls take part in after-school sessions and daylong summer programs. Activities vary from science and math projects to rock climbing, swimming and storytelling. Girls grow in self-esteem and learn to cope with such challenges as peer pressure, bullying and stress. “Most of our girls come from low-income families,” says Kathy Odgren, director of programs, “and 40 percent are English language learners.”

Girls Inc. is also a member of YouthConnect Worcester, a consortium of nonprofits first convened by the Foundation in 1989. Partners include the Boys & Girls Club of Worcester, Friendly House, the Worcester Youth Center, the YMCA and YWCA, and Y.O.U., Inc. About 700 middle-school students take part in its summer program, held on weeknights. “We reach deep into the community,” says facilitator Judi Kirk, of the Boys & Girls Club. “Many of these kids have nowhere else to go. Most return year after year.”

Serving the wider public interest is the Worcester Regional Research Bureau, whose independent analysis of policy issues promotes informed decisions. Its briefs educate government officials and the public; and its Harrington Public Forums on Municipal Government advance open discourse. “Our region’s demographics are rapidly changing,” says Executive Director Tim McGourthy. “Healthy civic engagement must represent the interests of all. The Foundation is a major partner that helps us broaden our reach.”

Also spanning sectors is the Worcester Education Collaborative, an independent advocacy organization. Its initiatives include Worcester Reads, a campaign that engages the entire community in advancing the literacy of Worcester children. “Our partnerships enhance public education and quality of life,” says Executive Director Jennifer Davis Carey. “We bring people together to solve problems. No one sector holds the answers.”
At Girls Inc., activities from rock climbing to art making reinforce development of life skills.
Grant Highlights

Below is a listing of organizations that received cumulative totals of $2,500 or more from our discretionary, donor advised, agency or designated funds.

15-40 Connection $14,500

Abby’s House $28,814
Arc of Opportunity in North Central Massachusetts $3,000
African Community Education Program $52,142
All Saints Episcopal Church $21,207
Alternatives Unlimited $15,543
American Antiquarian Society $30,934
American Red Cross of Central and Western Massachusetts $30,535
Anna Maria College $20,023
Appalachian Mountain Club $5,000
ART in the PARK, Worcester $8,000
ArtsWorcester $11,213
Ascentria Care Alliance $31,266
Athol Area YMCA $3,000
Auburn Youth & Family Services $8,879
Audio Journal $16,605

Big Brothers/Big Sisters of Central Mass/MetroWest $20,496
Big Brothers/Big Sisters of Massachusetts Bay $7,000
Blackstone Valley Boys & Girls Club $5,000
Bottom Line $9,000
Boys & Girls Club of Webster-Dudley $6,976
Boys & Girls Club of Worcester $34,614
Bridge of Central Massachusetts $30,571
Brookfield Elementary School $3,401

Camp Putnam $17,728
Canal District Alliance $3,044
Cape Cod Healthcare Foundation $7,500
CASA Project $21,925
Catholic Charities Worcester County $31,000
Central Massachusetts Area Health Education Center $110,614
Central Massachusetts Housing Alliance $25,118
Central Massachusetts Regional Planning Commission $13,000
Centro Las Americas $10,000
Children’s Friend $62,139
City of Worcester Division of Public Health $30,000
City of Worcester Health and Human Services $7,000
Clark University $46,459
College of the Holy Cross $3,500
Community Harvest Project $30,854
Community Healthlink $13,039

Community Legal Aid $39,127
Community Servings $9,276
Crawford Memorial Library $19,591

Department of Children and Families $25,000
Diocese of Palm Beach $2,500
Diocese of Worcester $3,454
Discovery Museums $9,500
Dismas House of Central Massachusetts $28,071
Doctor Franklin Perkins School $19,318
Dress for Success Worcester $8,284
Dynasty $12,000

East Douglas Evergreen Cemetery Company $13,137
East Quabbin Land Trust $15,331
EcoTarium $154,775
Edward M. Kennedy Community Health Center $249,587
Edward Street Child Services $78,024
Elder Services of Worcester Area $30,462
Eye of the Storm Equine Rescue $8,000

Family Health Center of Worcester $83,949
First Night Worcester $6,236
First Unitarian Church $27,939
Fitchburg Art Museum $2,869
Fitchburg Cultural Alliance $5,000
Francis W. Parker Charter Essential School $20,000
Friendly House $65,764
Genesis Club $22,647
Girls Inc. of Worcester $23,778
Good Samaritan Mission Council $19,731
Greater Worcester 32” Masonic Learning Center $2,553
Greater Worcester Land Trust $5,189
Growing Places Garden Project $7,402
GVNA Healthcare $3,000

Habitat for Humanity-MetroWest/Greater Worcester $10,024
Harvest Fair Committee $3,000
Hearts for Heat, Leicester Chapter $6,214
Horace Mann Educational Associates $8,000
Horizons for Homeless Children $7,000
Household Goods Recycling of Massachusetts $6,000

Interfaith Hospitality Network of Greater Worcester $10,000

Jeremiah’s Hospice $12,613
Jewish Family Service of Worcester $7,500
Jewish Healthcare Center $12,368
Joy of Music Program $17,602
Junior Achievement of Northern New England $12,000

Latin American Health Alliance of Central MA $17,000
Latino Education Institute $48,000
Leicester Council on Aging $7,060
Leicester Police Department $2,955
Leicester Summer Concert Series Committee $4,000
Literacy Volunteers of Greater Worcester $33,000

M
MAB Community Services $6,047
Main South Community Development Corporation $3,000
Massachusetts Audubon Society $45,891
Massachusetts General Hospital $14,500
Massachusetts Medical Society and Alliance Chapter $6,000
Matthew 25 $11,301
Mohegan Council Boy Scouts of America $12,728
Montachusett Interfaith Hospitality Network $15,000
Montachusett Opportunity Council $8,000
MSPCA-Angell $5,000
Music Worcester $19,832
Mystic Seaport $3,000

N
Nativity School of Worcester $12,001
NEADS/Dogs for Deaf and Disabled Americans $22,602
NEADY Cats $4,500
New Hope $10,000
Norman Rockwell Museum $50,000
North Brookfield Youth Center $10,000
North Quabbin Citizen Advocacy $7,000

Oak Hill Community Development Corporation $17,732
Old Sturbridge Village $31,500
Opera New England of Northeastern CT $3,500

Our Father’s House $16,229
Our Father’s Table $5,000

Pakachoag Church, U.C.C. $6,460
Pakachoag Music School of Greater Worcester $8,243
Park Spirit of Worcester $7,000
Pathways for Change $15,047
Performing Arts School of Worcester $3,000
Pernet Family Health Service $45,294
Petersham Memorial Library $15,000
Planned Parenthood League of Massachusetts $15,000
Pleasant Street Neighborhood Network Center $10,000
Pomfret School $5,000
Preservation Worcester $16,340
Proprietors of Rural Cemetery $12,006

Quinebaug Valley Community College Foundation $3,000
Quinsigamond Community College Foundation $26,927

Rachel’s Table $13,071
Rainbow Child Development Center $20,336
Reach Out and Read $18,000
Rectory School $5,000
Refugee and Immigrant Assistance Center $10,147
Regatta Point Community Sailing $7,000
Regional Environmental Council $92,254
Reliant Medical Group Foundation $4,130
Rise Above Foundation $4,000
Grant Highlights continued

**S**
Salvation Army $7,200
Salvation Army Lee County $3,000
Second Chance Animal Shelter $12,960
Seeds of Solidarity Education Center $10,000
Seven Hills Foundation $2,801
Shrewsbury Public Library $5,200
South High Community School $10,000
Southeast Asian Coalition of Central Massachusetts $54,914
Spanish American Center $8,600
St. Anne and St. Patrick Parish $8,000
St. Anne’s Church $3,000
St. Joseph and St. Pius X Parishes $5,000
St. Mary’s Parish $6,667
Stone Soup Collective $2,900
Straight Ahead Ministries $30,656

**T**
Temple Emanuel Sinai $48,668
Tenacity $7,500
Thayer Memorial Library $8,500
Touchstone Community School $50,000
Town of Auburn $47,699
Trinity Church $50,000
Trinity Lutheran Church $33,880
Tri-Valley $10,354
Twin Cities Community Development Corporation $13,000

**U**
UMass Memorial Foundation $39,502
United Negro College Fund $5,000
United Neighbors of Fitchburg $6,000
United Way Lee, Hendry & Glades $10,000
United Way of Central Massachusetts $147,626
University of Maine Foundation $5,000
University of Massachusetts Graduate School of Nursing $16,000
University of Massachusetts Medical School $97,000

**V**
Valley Residents for Improvement $21,000
Veterans, Inc. $19,918
VNA Care Network and Hospice $5,723
VSA Arts of Massachusetts $4,000

**W**
WCUW $12,385
Whitman Memorial Community Association $5,789
Windham County 4-H Foundation $10,000
Wing Memorial Hospital $100,000
Woodstock Academy $10,000
Worcester Academy $45,157
Worcester Animal Rescue League $16,635
Worcester Area Mission Society $5,000
Worcester Art Museum $306,795
Worcester Center for the Performing Arts $8,095
Worcester Chamber Music Society $6,173
Worcester Common Ground $23,483
Worcester Community Housing Resources $12,410
Worcester Comprehensive Education & Care $7,547

Worcester County Food Bank $5,132
Worcester County Horticultural Society $11,981
Worcester County Mechanics Association $25,357
Worcester County Poetry Association $4,338
Worcester Cultural Coalition $7,071
Worcester East Side Community Development Corporation $10,000
Worcester Education Collaborative $5,071
Worcester Historical Museum $134,119
Worcester Interfaith $14,000
Worcester Jewish Community Center $14,907
Worcester Polytechnic Institute $50,000
Worcester Public Library Foundation $10,446
Worcester Public Schools $33,589
Worcester Regional Research Bureau $7,131
Worcester Roots Project $19,111
Worcester State Foundation $97,874
Worcester Technical High School $7,762
Worcester Women’s History Project $3,000
Worcester Youth Center $36,663
Worcester Youth Orchestras $4,320

**Y**
Y.O.U., Inc. $147,071
YMCA of Central Massachusetts $33,752
YMCA of Greater Hartford $9,000
Youth Connect $15,000
YWCA of Central Massachusetts $60,341
Many individuals and families find that creating a fund with the Foundation offers a powerful, flexible and efficient way to increase the impact of their giving.

As a Foundation donor, you access expert guidance from Foundation staff, whose knowledge draws upon four decades of experience working with service providers and donors to better our community. Your fund fulfills your intentions in perpetuity, in your name or in honor of a loved one. Its growth generates 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 investment.

Start a Fund
Create your personal legacy by establishing a fund with a gift of $10,000 or more to the Foundation. You choose the type of fund that best meets your goals, and we do the rest – handling all administration and grant making on your behalf. The Foundation distributes money from your fund in perpetuity according to your wishes and the purpose of your chosen fund.

Types of Funds:
DESIGNATED FUNDS make annual grants to one or more nonprofit organizations in perpetuity.

DISCRETIONARY FUNDS AND FIELD OF INTEREST FUNDS enable the Foundation to address changing needs of the community.

DONOR ADVISED FUNDS engage the donor in annual grantmaking decisions.

SCHOLARSHIP FUNDS support post-secondary education of high school graduates based on donor preferences and guidelines.

AGENCY FUNDS are established by nonprofit organizations for their own benefit.

Consider a planned gift
Your financial advisor may recommend a planned gift, which can offer financial advantages now while securing your legacy in the future.

Ways to make a planned gift include:
- Naming the Foundation in your will or as the beneficiary of IRA assets
- Transferring a life insurance policy, making premium payments tax-deductible
- Donating retained real estate as a future gift while using the property throughout your lifetime
- Setting up a charitable gift annuity to receive income now while benefiting your cause in perpetuity

Your fund can open a range of opportunities for yourself and others that is as broad as your imagination.
List of Funds

**Discretionary & Field of Interest Funds**

**Market Value** $66.2 million  
**Grants Awarded** $2.7 million

Ruth and John Adam Fund (2000)  
George I. Alden Education Fund (2010)  
Lois Anne Memorial Fund (1993)  
Isabel K. Arms Fund (2005)  
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)  
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)  
Densmore Community Fund (2011)  
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)  
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. Massey 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)  
Carol L. Seager Fund

A native New Yorker who moved to Worcester more than 40 years ago, Carol Seager has grown to appreciate her adopted home. “Worcester is a small, friendly city,” says Carol. “As a single mother I was able to raise my two children here, build a thriving business, and become involved in civic affairs of the community.”

In 2014, Carol created a discretionary fund, entrusting decisions about its grantmaking to the Foundation’s Distribution Committee, which she chaired for six years. “It’s the best volunteer job in the city,” says Carol. “You learn about the region and the many programs that serve our community. The fund I’ve established is my way of saying ‘thank you’ to Worcester for enabling me to have a very happy, engaged and productive life.”

Rosalind Lee and Victor Ambros Fund

Massachusetts Institute of Technology alumni Rosalind Lee and Victor Ambros interview students aspiring to attend their alma mater. “They are talented and passionate,” says Victor, who with Rosalind joined the Program in Molecular Medicine at UMass Medical School in 2008. “But many lack opportunities to go as far as they want to go.”

“Kids drawn to science thrive on constant challenges,” says Rosalind, who manages the Ambros Lab at UMass. “Over time, they gain confidence and get hooked as problem solvers.”

“Being scientists is, to us, a dream come true,” says Victor, whose farm childhood included lots of hands-on learning. “We’re both children of immigrants and our parents struggled hard to set the stage for our success.”

The couple will bring life-changing science education to young people in Worcester using some of the $3 million awarded to Victor as recipient of a 2015 Breakthrough Prize in Life Sciences for co-discovery of microRNAs, nucleic acids that control gene expression. “We’ll take our time and identify grants that can accomplish the most,” says Victor. “We want every dollar to make a difference to a student.”
Bartholomew & Company Anniversary Fund

Bartholomew & Company, a wealth management firm serving individual investors and municipalities, celebrated its 20th anniversary in 2014 by creating a donor advised fund.

“This fund will actively engage our employees in grantmaking,” says the firm’s founding president, Thomas J. Bartholomew, a Foundation board member and chair of its Investment Committee. A committee of employees will establish criteria for the fund and work with the Foundation each year to choose local grantmaking opportunities.

A ’79 graduate of Assumption College who has rooted his life and business in Central Massachusetts, Tom has deep ties to the region and so do many of the firm’s employees.

“Our employees have helped build this company,” says Tom, “and Worcester is our home. By giving through this fund, we benefit our community and improve its quality of life.”

Geoffrey Dancey and Rashida Garcia-Dancey Family Fund

Geoffrey Dancey and Rashida Garcia-Dancey, with their young daughter Nia, are eager to make philanthropy a family affair. “We want giving to be part of our life together,” says Geoffrey. “We want to raise Nia with the same values we grew up with – including the importance of giving back.”

Nia has also influenced the couple’s outlook on philanthropy. “Having our first child makes us concerned about helping vulnerable children,” says Rashida.

“Our fund is a great vehicle to organize our giving,” says Geoffrey, president of Cutler Capital Management. “We support a variety of local causes, including Clark, our alma mater, and our fund makes this easy to do.”

Rashida adds, “We want to give back to the community that’s had such positive impact on our lives.”

Donor Advised Funds

**Geoffrey Dancey and Rashida Garcia-Dancey Family Fund**

- Market Value: $19.4 million
- Grants Awarded: $1.4 million

**Rosalind Lee and Victor Ambros Fund**
- (2014) NEW
- Elkanah B. Atkinson Community and Education Fund (1986)

**Bartholomew & Company Anniversary Fund**
- (2014) NEW
- 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)
- George S. and Tammy Butler Fund (2007)
- Marcia Butzel Fund (2001)
- John J. and Elaine C. Cahill Family Fund (2012)
- Maureen Logan Coghlin Fund (2001)
- Paul E. Cohan Fund (2000)
- Dr. James J. Convery and Tracy A. Craig Fund (2009)
- Elizabeth A. Culhane Memorial Fund (2000)
- Jeanne Remillard Curtis Fund (1999)
### J and J Fund

Carrie Crane named her fund in honor of two dear friends who passed away. “Janne and Jules were both generous individuals,” says Carrie. “Each supported her community in her own, personal way – Janne on a macro scale, and Jules, person to person.”

Drawn to individuality when it comes to philanthropy, Carrie, a visual artist, likes to invest in creative projects that benefit others in specific, tangible ways. Often such ventures have long molting periods and reward vision, persistence, and faith.

Carrie likes the freedom and ease afforded by her fund. “When I come across a project that really interests me, I can support it in a bigger way,” says Carrie, a seventh-generation descendant of Zenas Crane, who in 1801 founded Crane & Company, the iconic paper manufacturing company based in Dalton. “My fund also streamlines annual giving to various organizations.

“Community foundations are incredibly convenient for donors and full of resources for anybody who wants to become more involved in their giving – including phenomenal guidance,” says Carrie, a Boylston resident active in Worcester’s art scene. “I’ll gain that support from the Foundation. Its deep knowledge of the community will help me give in the most effective way.”

### Ken and Pat Jones Family Fund

Ken and Pat Jones have been involved with the Foundation for many years and looking ahead, they decided to establish a donor advised fund to benefit the community in perpetuity.

“We’ve always been advocates of the Foundation,” says Pat, a long-serving Foundation corporator and a member of the Foundation’s Professional Advisors Network. “We originally established this fund as part of our estate planning. As a professional advisor, I often find myself recommending the Foundation to clients. In a way, we’re practicing what we preach by creating this fund.”

Pat and Ken envisioned that after their deaths, the fund would inspire their six children to engage in their own charitable giving. But rather than wait until settlement of their estate, they decided to start the fund now.

“We can begin using our fund to meet its goal,” says Ken. “With this fund, we’ll support youth development through education and activities that foster self-reliance. We’ve seen the benefits of education and self-reliance in our children’s lives.”
Raised in a working class family, Shirley Kane still recalls an early lesson in giving. “My father bought himself a nice winter coat,” says Shirley. “The next day, he came home without it. He told me, ‘A man was cold. He needed it more than I did.”

Shirley’s philanthropic interests include the arts, social justice and education. Her fund simplifies giving by providing the ease and efficiency of one-stop shopping. “The Foundation frees me from the burden of tracking gifts and paperwork,” says Shirley. “And as part of its endowment, my money generates interest that the Foundation uses for the greater good of our community.

“I feel strongly about giving back to Worcester,” continues Shirley. “Its small town atmosphere of mutual support and trust enabled my husband to build a thriving business. We’ve had a good life here.”

Ophthalmologist Jean Keamy, MD practices in Westborough and she first learned of the Foundation through her patients.

Inspired by their late father, Donald G. Keamy, MD, who created a family foundation in memory of their mother, Yvonne, Jean and her siblings Cheryl and Donald created a fund of their own. “Our father wanted us to learn about philanthropy,” says Jean, who with her siblings envisions grantmaking that advances higher education. “Our parents valued scholarship and we all earned advanced degrees,” says Jean. “Our father took jobs to pay for his schooling and then worked hard to fund ours.”

Jean, a photographer, looks forward to contributing to the arts as well as the sciences. “My mother was deeply interested in the arts,” says Jean, “and my father loved the sciences. We’ll honor our parents by supporting both pursuits.”

Donald and Tina Mancini regard giving as an engrained family value that they hope to pass on to their children. With their new family fund, Donald, Tina and their four children will make decisions together on how to direct grants to best serve their community.

Don and Tina grew up in Central Massachusetts, where they have established their careers and now raise their family. “Worcester has been very good to us,” says Don, “and we want to give back in a meaningful way.”

The couple met at St. Peter Marian High School, and early on began volunteering together at such local organizations as the Mustard Seed. They also served as emergency placement foster parents. “We feel blessed to now be able to share our resources as well as our time,” says Don.

“We want to help make our community the best it can be,” says Tina. “Our children will grow up knowing the importance of getting involved, volunteering and sharing their resources to make their world a better place.”
Peter Metz, MD, a child and adolescent psychiatrist, and his wife Phyllis Pollack, MD, a pediatric cardiologist, came to Worcester more than 30 years ago to join the faculty of UMass Medical School. Over the years, both Phyllis and Peter have been involved in many community organizations.

Their donor advised fund gives the family a vehicle to share philanthropic interests for generations to come. Its name, the acronym PEACE, stands for the couple’s first names as well as their priorities: education, the arts, child and family well being, and the environment.

“We’re influenced by a model set by my parents, Ruth and Peter Metz, who actively supported nonprofits serving their community,” says Peter, a Foundation corporator. Peter and Phyllis value the Foundation’s expert guidance. “We consider ours to be a Foundation-advised fund.”

“Commitment to the community is paramount,” adds Phyllis. “We look forward to developing new collaborations that intersect with our interests.”

In honor of their 50th wedding anniversary, Stephen and Cynthia Pitcher created this donor advised fund to involve their family in philanthropy.

The couple made Worcester their home more than 40 years ago, and all three of their children – David, Jeff and Ginny – graduated from Doherty High School.

Cynthia and Stephen have set priorities for their fund – education, culture and social welfare. Each year, they will meet with David, Jeff, Ginny and their spouses to make grantmaking decisions.

“We’ll learn together,” says Cynthia, a Foundation corporator, “and discover what we can do as a family.”

“Making grants together will be an adventure for us,” agrees Stephen, who serves on the board of the Foundation’s Nonprofit Support Center. “Our children will open our eyes to new possibilities.”

PEACE Fund

Pitcher Family Fund
Matthew Pollini Memorial Fund

Spc. Matthew Pollini, 21, of the 772nd Military Police Company, Massachusetts Army National Guard, Taunton, died on January 22, 2009 in Iraq of injuries from a vehicle rollover.

At the Taunton armory, his company trains in the Spc. Matthew M. Pollini Drill Hall. Outside, a marble bench dedicated to Matthew is surrounded by flowers in summer and in winter, kept free of snow.

His squad also honors Matthew with an endowed fund. “Matthew always cared about others,” says Staff Sgt. Gina Bilotta, who served with Matthew in Iraq. “We keep his memory alive by helping others in his name.”

Grants benefit victims of natural and manmade disasters, particularly families of fallen first responders.

Squad members raise money for their fund with the Annual Spc. Matthew Pollini Memorial Motorcycle Run and barbecue, held in August since 2010.

“Matt was the epitome of a leader and what a soldier should be,” says Capt. Derek Baran, Matthew’s commanding officer in Iraq. “He was also known to throw in a good joke to keep company morale high.”

Staff Sgt. Michael Petterson adds, “His squad loved him.”

Worcester Postal Credit Union Charitable Fund

The Worcester Postal Credit Union served its members well for almost nine decades. In April 2013, it merged with AllCom, a community credit union that is also deeply rooted in Worcester County.

AllCom Credit Union established this donor advised fund to honor the former credit union for its distinguished service to the region’s postal employees and their families.

The committee recommending grants comprises six board members – four from the former Worcester Postal Credit Union and two from the AllCom Credit Union board.

“We choose causes dear to postal workers such as food drives and holiday gift-giving to children, which they’ve actively supported for years,” says Debbie Guiney, president and CEO of AllCom Credit Union. “This donor advised fund is a perfect fit. AllCom has partnered with the Foundation in the past for a scholarship fund, and we’re extremely pleased with its expertise and professionalism.”

Pakachoag Church Fund for Human Understanding (1999)
Christopher J. Paskell Memorial Fund (2004)
PEACE Fund (2014) NEW
Town of Petersham Fund (1984)
Pitcher Family Fund (2014) NEW
Matthew Pollini Memorial Fund (2014) NEW
Practical Education Fund (2010)
Pyle Fund (1986)
Rawji Conservation Fund (2013)
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 Waspatt Fund (1997)
Meredith D. Wesby Founders Fund (2012)
Courtney C. Wetzel Memorial Scholarship Fund (2012)
Todd H. Wetzel Fund (1992)
Whittier Family Charitable Gift Fund (2007)
Patricia A. and Robert M. Bourke Memorial Scholarship Fund

Patricia and Robert Bourke built their home in Auburn in 1952, and raised their five children in the house. Robert died in 2012 and Patricia passed away a year later. After Pat Herzfeld and her siblings sold their parents’ house, she created scholarships in their honor with her share of the proceeds. “I want to keep their memory alive here,” says Pat. “My parents were always very proud to live in Auburn.”

Intended for Auburn High School seniors with financial need, the fund makes two awards each year. The Patricia A. Bourke Memorial Scholarship favors students who plan to major in pre-veterinary studies, music, or elder care. The Robert M. Bourke Memorial Scholarship targets students aspiring to technical/vocational careers.

“My mother was a lifelong animal lover and volunteered as a nursing home ombudsman in retirement,” says Pat. “My father was an electrician and taught in a vocational high school. His many interests included growing fruit trees. They were both very good role models.”

Catherine Burgholzer Memorial Scholarship

The Catherine Burgholzer Memorial Scholarship is intended for high school graduates from Shrewsbury, where Catherine taught health and adaptive physical education to elementary school students.

Grades and community service are the principal criteria, as well as having a parent afflicted by cancer. “We want to support others who’ve been through this,” says Catherine’s daughter Julie.

Julie and her siblings Casey and Paul envisioned the scholarship as a tribute to their mother, who died in 2011 from cancer. They pooled their talents to raise funds for the scholarship and their father, Paul, ran his first Boston Marathon in 2014 to recruit donors. Within a month, their campaign raised $10,000 from 150 donors. “We are very touched by all this support,” says Casey. “Together, we are keeping our mom’s values alive.”

Above: Catherine Burgholzer in May 2000 at her graduation from Worcester State College
Kelly A. Davis Memorial Scholarship Fund

Kelly Anne (Gryncel) Davis was a born fighter. A two-pound preemie at birth, Kelly grew into a strong young woman. A top student at Ashland High School and captain of field hockey and basketball teams, Kelly earned BS and MBA degrees from Babson College, flourished in a corporate career, and also managed to visit nearly every Disney theme park in the world.

Above all, Kelly thrived in her relationships. Kelly and her husband Scott made their home in Grafton with their two children, Abby, age eight, and Ryan, six. Adored by her family and beloved by her wide circle of friends, Kelly filled her life with love, even while fighting the last battle of her life and surviving breast cancer for 20 months.

Kelly’s legacy is honored with a scholarship intended for a female graduate of Grafton High School who is on the honor roll and plays varsity sports.

“Kelly has touched many lives,” says Jennifer Rowland, who with Julia Crosby established the scholarship. “We and Scott will take part in the scholarship committee but in years to come, their children and grandchildren will make these awards in her name.”

Mary Sahagen Lonstein Scholarship Fund

A daughter of Albanian immigrants, Mary Sahagen Lonstein cherished her parish, St. Mary’s Assumption Albanian Orthodox Church. Founded 100 years ago by Albanian newcomers, St. Mary’s is a vibrant center for the Albanian community in Worcester County.

In 1989, Mary and her husband Leon visited Albania with a group of other professionals and were integral in founding and leading the New England Albanian Relief Organization, which provided medical supplies, food and clothing to Albanians during the country’s transition to democracy.

Mary created a scholarship fund through a bequest that will benefit a graduating high school senior or college student actively involved in St. Mary’s. Parishioner Robert Laska says, “Mary’s heart was always with the Albanian community both here and overseas.”
Friends of Rutland Heights Hospital Permanent
Fund (1993)
Judge and Mrs. William Garbose Fund (1998)
Derek Gaudette Memorial Scholarship Fund (1995)
General Scholarship Fund (1990)
Matthew Gignac Memorial Scholarship Fund (1999)
Greg’s Grant Fund (1997)
Grynse1 Educational Scholarship Fund (2006)
Emil Haddad Jazz Scholarship Fund (2004)
Joseph F. and Claire L. Halvey Scholarship
Fund (2002)
Marty Hastings Memorial Scholarship (2010)
Hedin Family Memorial Scholarship Fund (2007)
Maureen Henrickson Memorial Scholarship
Charles Hugo Community Service Award Fund (2007)
Debbie Anne Johnson Memorial Fund (1993)
Janca Lynn Junnilla 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)
Lieutenant Colonel Irving A. and Colonel Marie C.
Lepore Fund (2012)
Mark MacPherson Lightbown Memorial Scholarship
Fund (1980)
Lincoln Village Scholarship Fund (2001)
Mary Falby Logan and Francis Logan Jr. Scholarship

Mary Sahagen Lonstein Scholarship Fund
(2014) NEW
Lunenburg Opportunity Fund (1999)
Daniel Stephen Lussier Athletic Scholarship (2010)
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)
Howard J. and Dorothy R. McGuiness Scholarship
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 Fels Scholarship Fund (2001)
Nichols Academy Scholarship Fund (2001)
Arnold and Sylvia Nylund Scholarship Fund (2001)
Sarah Daniels Pettit and William O. Pettit Jr.
Scholarship Fund (1996)
Richard W. Pierce Fund (1985)
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 (2012)
Seven Hills Charter Public School Scholarship
Fund (2011)

Herbert D. Sherwin Memorial Scholarship
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)
Summer B. Tilton Memorial Scholarship Fund (1985)
Laurie C. Tinsley Scholarship Fund (2002)
Carmen Tobin Nursing Scholarship Fund (1995)
Tobin Family Fund (1999)
Mark W. Tripp Scholarship (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 (2001)
Worcester Woman’s Club Fund (1999)
Robert M. Hyde Family Fund for Beaman Memorial Public Library

The periodical room of the Beaman Memorial Public Library in West Boylston recently became the Robert M. Hyde Family Reading Room. Its renaming honors an ardent patron, Robert M. Hyde, whose daughter Debbie created this endowed fund to support the library in perpetuity.

A lifelong resident of West Boylston, Robert, now retired, was an accomplished fundraiser for such institutions as Clark University and the Worcester Foundation for Biomedical Research. From 1988 to 1994, he served as the Foundation’s first development officer, spearheading a period of rapid growth.

By creating this fund, Debbie celebrates two of her father’s enthusiasms. “My dad loves the library,” says Debbie. “And he’s a huge fan of the Foundation.”

Mr. and Mrs. Warren C. Lane Jr. have been friends of the Foundation since its beginning. As donors and advisors, they value its personal approach to philanthropy. In recent years, they have found comfort in creating memorial funds that provide lasting tributes to loved ones by continuing to make a difference in the world in their honor. The couple created two funds in 2014. One is dedicated to their grandson Nathaniel, who died at age 23, and another is a tribute to their son Prescott, who passed away at age 51.

Nathaniel A. Lane Memorial Fund
Born and raised in Leominster, Nathaniel was a gifted artist and an avid environmentalist. While employed as a pharmacy technician, Nathaniel was preparing himself for a new vocation by studying energy management at Mt. Wachusett Community College. The fund will support the Silent Spring Institute, a public interest organization dedicated to environmental research and activism that protects health and saves lives.

Prescott N. Lane Memorial Fund
Prescott lived life to the fullest and sought to nurture and protect the people and causes dear to his heart. Prescott was an attorney and enjoyed sailing, photography, motorcycling, skiing, and ice-skating. Prescott’s passions were animals, veterans and democracy. He readily responded to those in need. Prescott’s parents dedicate his fund to the Massachusetts Society for the Prevention of Cruelty to Animals-Angell, with its mission to protect animals and relieve their suffering and work for a just and compassionate society.

Designated Funds

**Market Value** $19.8 million

**Grants Awarded** $0.66 million

Abby’s Empowerment Fund (2009)
Hollis E. and Gwendolyn D. Alden Fund (1977)
Clarence S. Arms Family Fund (1986)
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)
Dr. and Mrs. Edward Budnitz Fund (1995)
Polly C. and Joseph R. Carter Fund (1987)
Central Massachusetts Disaster Relief Residue Trust Fund (1980)
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)
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)
Samuel Frank Designated Fund (1993)
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) NEW
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)
Kimberley Lane Godard Memorial Fund (2012)
Nathaniel A. Lane Memorial Fund (2014) NEW
Prescott N. Lane Memorial Fund (2014) NEW
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)
Barrett and Mahroo Morgan Fund (2007)
Vasiliky Strates Moschos Memorial Fund (2002)
Rani P. and Haribabu Muddana MD Fund (2001)
Paul M. Pezzella Fund in Memory of Patsy and Theresa Pezzella (1999)
Pomfret Community School Arts Fund (2006)
Lillian S. Pratt Fund (2007)
Hon. James F. Queenan Legal Services Fund (2011)
John and Gloria Rauth Library Fund (2001)
Renaissance Award Fund (2004)
Marvin Richmond Fund (1998)
Chapin Riley Fund (2000)
John E. and Ethel E. Riley Outstanding Citizenship Award Fund (2010)
Katharine Higgins Riley Fund (1991)

Under the leadership of Executive Director William D. Wallace since 1976, the Worcester Historical Museum has become a dynamic community asset, engaging audiences in the culture and history of Worcester in new and inventive ways.

A leadership gift from the George I. Alden Trust established this designated fund to endow the executive director position. Named in Bill’s honor, the fund welcomes donations of all sizes from citizens of the region.

“The Foundation is an effective and efficient steward of our fund,” says Mark Shelton, a member of the board of trustees and currently president of the 140-year-old museum, which is conducting an important capital campaign to secure the future of Worcester’s past. “And we share a common mission, to celebrate and foster the resources of our region for today and tomorrow.”
Boylston’s 4,300 residents are proud of their public library, housed in a 1904 building designed by Worcester architects Fuller & Delano.

“Advances in digital technology enable us to expand and update our library without relocating it,” says Christina Stille, president of the Boylston Public Library Foundation, which works to fund improvements to the collection, programs, and services that exceed the town budget. “We can’t predict what the library will need in 20, 60 or 100 years. Our endowed agency fund will always be there to meet its changing needs.

“With our agency fund, our money is professionally invested with more than 550 other named funds. We gain fiscal stability and generate income for the library in perpetuity.”

Boylston Public Library Foundation Fund

Marion & Arthur Rossiter Fund for Evangelical Congregational Church (2011)
Saul A. Seder Fund (1991)
Khazma A. Soffan Memorial Fund (2000)
Helen M. and Thomas B. Stinson Fund (2001)
Polly and Dick Traina Fund for Y.O.U., Inc. (2009)

William D. Wallace Executive Director Endowment Fund (2014) NEW
Mary Louise Wilding-White Fund (1978)
Harold Davis Woodbury Fund (1987)
Worcester Art Museum Booth Family Fund for Education and Outreach (1999)
Worcester Arts and Humanities Educational Collaborative Fund (2002)
Worcester Public Library Fund (1992)

Agency Funds

Market Value $18.2 million
Grants Awarded $5.7 million

Abby Kelley Foster House Fund (2008)
American Red Cross of Central Massachusetts Fund (2000)
Father Miguel Bafaro Fund (1998)
Barre Players Endowment Fund (1997)
Big Brothers/Big Sisters Mentoring Fund (1999)
Blackstone Valley Education Foundation Fund (2005)
Boston Chinatown Neighborhood Center Funds (2011)

Boylston Public Library Foundation Fund (2014) NEW
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 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)
Jane Fund of Central Massachusetts Fund (2008)
Latin American Health Alliance of Central Mass Fund (2010)
Priscilla Mason Endowment Fund (2014) NEW
Master Singers of Worcester Fund (2007)
Matthew 25 Funds (2000)
Millbury Public Library Endowment Fund (1991)
National Memorial Trust Fund (1990)
Preservation Worcester Endowment Fund (2011)
Rural Cemetery Fund (2006)
St. Mary’s Assumption Albanian Orthodox Church Endowment Fund (2012)
Tatnuck Brook Watershed Fund (1996)
Temple Emanuel Sinai Fund (2007)
Touchstone Community School Funds (2005)
United Way of Central Massachusetts Fund (1987)

West Boylston Historical Society Fund (2014) NEW
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)
Rev. Richard and Shirley Wright Emmanuel Baptist Church Endowment Fund (1994)
Youth Opportunities Upheld, Inc. Fund (1987)

Priscilla Mason Endowment Fund

On Friday nights in Whitinsville, skaters of all ages glide to music in the gym of the George Marston Whitin Memorial Community Association.

Envisioned by George Marston Whitin (1856-1920), a founding CEO of the Whitin Machine Works, and established in 1922 by his daughters, the facility, known as the Whitin Community Center, continues to thrive at its original mission: to enhance the health and well-being of individuals and families and build a strong community in the Blackstone Valley. Serving more than 5,000 members, the Center runs the region’s most complete recreation complex and largest childcare center.

When Whitin’s granddaughter Priscilla Mason (1914-2012) died at age 98, her bequest created a gift to continue her support in perpetuity. “Priscilla gave generously to our organization during her lifetime,” says Heather Elster, acting executive director. “Now, with her fund, she will continue her family’s legacy and traditions for generations to come.”

West Boylston Historical Society Fund

The West Boylston Historical Society is devoted to a town whose location at the convergence of three rivers has shaped its fortune. West Boylston was incorporated in 1808 through the persistence of Major Ezra Beaman, considered the town father. Robert Bailey Thomas, author of The Old Farmer’s Almanac, was its first town clerk. West Boylston and its water supply drew many industrialists. By the 1890s, the town was lined with factories and worker housing. A decade later, the state submerged much of the town to create the Wachusett Reservoir and bring water to fast-growing Boston.

Headquartered in historic Bigelow Tavern, the Society preserves and honors the town’s history through programs, exhibitions and publications.

“We need to conserve our collections and provide good programs,” says Society Treasurer Aaron Goodale, an eighth generation resident whose family were original settlers of the town. “Memberships and fundraisers don’t give us the funds we need. At the Foundation, our money is invested by professionals and hopefully will earn higher returns.”
Creating a Legacy: The Acorn Society

The Acorn Society honors individuals whose estate planning includes a gift to create a fund with the Foundation. Just as an acorn grows into a mighty oak, so a gift planned today yields enormous benefits for generations to come.

Anyone who has named the Greater Worcester Community Foundation as a beneficiary of a life insurance policy, retirement plan, or simple bequest is eligible to join the Acorn Society. Benefits of membership include invitations to Foundation donor events and, above all, the satisfaction of establishing a secure legacy that will achieve your personal philanthropic goals in perpetuity. We are deeply grateful to every member of the Acorn Society. Your legacy strengthens your Foundation – and your community. For a confidential conversation, call us today.

Members
Anonymous (11)
Robert S. Adler
Isabel K. Arma*
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
Douglas P. Butler*
Kenneth F. and Nancy Candito
Richard P. Coonan
Dix F. and Sarah B. Davis
James S. Demetry
Henry B. and Jane K. Dewey
Robert E. Dik*
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
Richard E. Hedin
Nason A. Huowitz and Martha P. Grace
Sona Husision
Donald Inglis
Forrest A. and Shirley H. Jacobs
M Howard and Frances Jacobson
Kenneth R. and Patricia L. Jones
Pamela B. Kane and Roy T. Charette
Sarah Lange
David P. Leach and Audrey Klein-Leach
Catherine H. Levine
Margaret D. Lincoln
Ann T. Lisi
Mónica 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
Sarah D. Pettit*
Bonnie M. Prescott
James F. and Helen E. Queenan
John A. and Gloria W. Rauth
Azim Rawji and Robin Van Liew
Mary C. and William J. Ritter
Susan and C. Reid 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
Cynthia C. Taylor
Laurie D’Amico Tigan
Sumner B. Tilton Jr.
Margaret Wolcott
Richard B. and Edith W. Wolf
David K. Woodbury
Kimball R. Woodbury

Acorn Society members Joseph & Charlene Stolberg, lifelong residents of Worcester County, have named the Foundation as a beneficiary of their estate. “We enjoy giving back to our community, which has been so good to us,” says Joe, a Foundation corporator and founding chair of its Professional Advisors Network. “And we enjoy knowing that we’ll keep giving back after we’re gone.”

Planned giving suits the Stolbergs, parents of teenagers. “While raising a family, we’re looking ahead to make a future gift,” says Joe. “The Acorn Society lets us do this, with the satisfaction of knowing we will support our community in perpetuity.”
Financial Stewardship

The Foundation takes great care to ensure that the gifts entrusted to us will endure for the long term. Funds are invested in a commingled pool, governed by a diversified investment strategy intended to preserve capital for the future and meet community needs today.

2014 Investment Committee
Robert S. Adler    Dix F. Davis
Thomas J. Bartholomew    Warner S. Fletcher
J. Christopher Collins    Abraham W. Haddad
James E. Collins    Timothy M. Jarry
Jeffrey S. Solomon

Investment Consultant
Jeffrey R. Croteau, Prime, Buchholz & Associates, Inc.

Portfolio

- Domestic Equity | 3 managers
- International Equity | 5 managers
- Flexible Capital | 5 managers
- Fixed Income | 3 managers
- Real Assets | 4 managers
- Cash

3%
10%
12%
22%
23%
30%

For more information
For a complete copy of the audited financials visit our website at www.greaterworcester.org or email donorservices@greaterworcester.org.

Summary Financial Statements (Years ended December 31, 2013 and 2014)

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
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<tbody>
<tr>
<td><strong>ASSETS</strong></td>
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<tr>
<td>Investments</td>
<td>$138,595,761</td>
<td>$136,136,283</td>
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<tr>
<td>Operating Cash</td>
<td>$269,886</td>
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<tr>
<td>Other Assets</td>
<td>$124,904</td>
<td>$260,292</td>
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<td><strong>TOTAL ASSETS</strong></td>
<td>$138,990,551</td>
<td>$136,666,180</td>
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<td><strong>LIABILITIES AND NET ASSETS</strong></td>
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<tr>
<td>Accounts Payable &amp; Accrued Expenses</td>
<td>$165,038</td>
<td>$121,889</td>
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<tr>
<td>Agency &amp; Split Interest Funds</td>
<td>$16,321,962</td>
<td>$15,050,037</td>
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<td>Net Assets</td>
<td>$122,503,551</td>
<td>$121,494,254</td>
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<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
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<td>$138,990,551</td>
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<tr>
<td><strong>REVENUES</strong></td>
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<tr>
<td>Contributions</td>
<td>$4,617,264</td>
<td>$3,138,182</td>
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<td>Net Investment Returns</td>
<td>$3,345,841</td>
<td>$14,073,978</td>
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<td>Other</td>
<td>$18,434</td>
<td>$170,257</td>
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<td><strong>TOTAL REVENUES</strong></td>
<td>$7,981,539</td>
<td>$17,382,417</td>
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<td><strong>GRANTS &amp; EXPENSES</strong></td>
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<tr>
<td>Grants</td>
<td>$5,412,475</td>
<td>$5,147,130</td>
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<td>Operating Expenses</td>
<td>$1,559,767</td>
<td>$1,330,566</td>
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<td><strong>TOTAL GRANTS &amp; EXPENSES</strong></td>
<td></td>
<td>$6,972,242</td>
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<td><strong>CHANGE IN NET ASSETS</strong></td>
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<td>NET ASSETS, beginning of year</td>
<td>$1,009,297</td>
<td>$10,904,721</td>
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<tr>
<td>NET ASSETS, end of year</td>
<td>$122,503,551</td>
<td>$121,494,254</td>
</tr>
</tbody>
</table>

*does not include agency funds

The audit of the Foundation’s financial statement as of and for the years ending December 31, 2013 and 2014 was conducted by Alexander, Aronson, Finning & Co., PC.
Board of Directors

Gerald L. Gaudette III  
CHAIR  
President, Gaudette Insurance Agency, Inc.

Warner S. Fletcher  
VICE CHAIR  
Director, Fletcher Tilton

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TREASURER  
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CLERK  
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Partner, Mirick O’Connell

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Chief Investment Officer, College of the Holy Cross

Alison C. Kenary  
Community Volunteer

Patsy C. Lewis  
Nonprofit Consultant

Linda C. Looft  
Assistant Vice President for Government and Community Relations, WPI

Mónica Escobar Lowell  
Vice President Community Relations, UMass Memorial Health Care

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Chief Strategic Officer, Fallon Health

Scott Rossiter  
Chairman, Lampin Corporation

George W. Tetler III  
Partner, Bowditch & Dewey

Matthew Wally  
Community Development Manager, TD Bank

Charles S. Weiss  
Director, Strategic Initiatives, College of the Holy Cross
Our Mission

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

The Greater Worcester Community Foundation family lost several treasured friends during 2014, including...

Arthur J. Andreoli
Isabel K. Arms
John J. Binienda Sr.
Douglas P. Butler
Edwin B. Coghlin Jr.
Anahid M. Constantian
Ronald S. Davis
Alan S. Dean
Esther Freeman
Wyatt Garfield
Sophie Kosky
Helmi D. Lehtola
Robert Z. Nemeth
Terri Priest
Anne C. Whipple
Leonard H. White