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**ON THE COVER**

**Early learners thrive on creative play.** Each of us has a right to a healthy future. Tomorrow’s doers, makers, and dreamers are developing today in high-quality childcare and early learning programs. The Foundation’s Early Childhood Initiative is working with its partners to make such programs accessible to all in our community.

We are about to launch a major, five-year program with the Worcester Public Schools that could become a model for a comprehensive, citywide approach. Formed through a yearlong planning process funded by the George I. Alden Trust, the program will encompass two schools and the neighborhoods surrounding them. The evidence-based program will provide local families with integrated early learning and health services that foster the cognitive, social, emotional, and physical growth of children from birth through grade three— the formative years that shape a child’s future.
Our region has long been home to makers, doers, dreamers, and builders. Perhaps because of its roots in the Industrial Revolution, Worcester County has drawn many people from elsewhere seeking opportunities. We welcome all and heed all as together, through this Foundation, we work to bring opportunities within the reach of all who live here.

In the 1970s, a group of citizens established the Greater Worcester Community Foundation. This model of citizen-run philanthropy has proven its effectiveness and staying power. Their model suits the ingenuity and resourcefulness of our community, as with compassion, imagination, and a can-do spirit, a host of nonprofits has emerged to spread opportunity further in an astonishing variety of ways.

Empowered by the funds donors entrust to us, the Foundation invests in the effectiveness of these nonprofits, both with grants and through our Nonprofit Support Center, where together, they learn and share best practices. And early on, the Foundation expanded beyond grantmaking to build partnerships across sectors and solve broader problems, such as lack of decent affordable housing.

Together with our donors, grantees, and partners, we’ve grown in knowledge, relationships and funds—assets that enable us to take prudent risks on a large scale when the rewards promise far-reaching outcomes. Such ambitious ventures include our Early Childhood Initiative and Creative Worcester. Find out more about these programs in this annual report as well as other inventive projects that every day make life better for so many of us.

We both look forward to continuing this rewarding enterprise with you, although no longer as CEO and Chair. Retirement after 30 years and completion of a full three-year term concludes our service in these respective roles with your Foundation. What a wonderful experience it has been to help guide its growth. In this time of divisiveness on the national level, our model of local philanthropy continues to prove its worth, bringing us together to better our community with compassion, imagination, and a can-do spirit.

Ann T. Lisi
President and CEO

Gerald M. Gates
Chair
2018 HIGHLIGHTS

Notable Milestones

• **The Foundation’s Early Childhood Initiative** completed plans for a five-year prenatal-through-grade three pilot project to begin in 2019 at two Worcester public schools; awarded $403,000 in grants; and played a key role in forming the Together For Kids Coalition.

• **Creative Worcester** completed its first full year spearheading Worcester’s first Cultural Plan; awarding 11 Creative Spark grants totaling $69,000 and granting a total of $300,000 to five Creative Engagement grantees who took part in a year-long learning cohort. (See opposite page.)

• **Discretionary and Field of Interest grantmaking across all categories totaled $2.86 million** complemented by strong participation of committees that review applications and recommend grantees and then visit funded projects to evaluate outcomes.

• **Health-focused grantmaking** from Fairlawn Foundation and Fallon OrNda funds targeted Greater Worcester Community Health Plan (CHIP) priorities.

• **The Nonprofit Support Center** conducted 14 workshops, all highly rated, including three on workplace diversity, equity and inclusion; a series tailored to arts organizations; and sessions on building fundraising capacity.

• **Youth For Community Improvement** completed its 19th year by engaging youth from Worcester and surrounding towns who as a team identified needs, created an RFP, evaluated applications, and awarded $25,300 in grants. The youth spearheaded a special project to address homelessness by conducting a tri-city clothing drive.

• **Leadership Worcester** kicked off the fourth cohort by participating in the United Way’s Day of Caring; work began to launch a formal alumni group; and we saw one alum announce her run for Worcester City Council while another was elected to the Boylston Planning Board, crediting the program for preparing them to step forward.
Creative Worcester and Worcester’s first Cultural Plan

In partnership with the Worcester Cultural Coalition and the City of Worcester, the Foundation has spearheaded development of a Cultural Plan for the City of Worcester. Now drafted after a year of gathering community input, the plan, once finalized, will be incorporated into the city’s 10-year master and strategic plans.

As part of its Creative Engagement Initiative, funded by a $500,000 Barr Foundation grant, the Foundation worked with consultant Creative Community Builders to convene a series of public meetings. Meanwhile, the Worcester Cultural Coalition conducted an online survey. This input process concluded with an October meeting at the Hanover Theatre that drew more than 100 participants. Community priorities include public spaces conducive to cultural experiences that draw all sectors of the community and events that engage children and families.

With its first formal cultural plan, the city will gain an agenda to guide private and public investments that build on Worcester’s distinctive arts and cultural resources to enhance quality of life for all.

The final cultural planning meeting in October drew more than 100 participants from the community.
Since 2015, the Foundation’s EARLY CHILDHOOD INITIATIVE has been working to nurture healthy development of children during their formative first years. Recognizing that a strong start yields gains that last a lifetime, the Initiative is striving to advance community-wide access to resources that foster a child’s ability to thrive—from quality prenatal care and early education through programs that stem summer learning loss and enhance third-graders’ literacy and social proficiencies.

Through cross-sector partnerships and strategic grantmaking, the Foundation’s Early Childhood Initiative intends to close an achievement gap that sets in early and hinders entire lives in Worcester, where just 38 percent of third-graders read at grade level. In 2018, the Foundation completed planning of a five-year pilot project designed to improve kindergarten through third-grade outcomes of local children.

The Foundation will be launching its PRENATAL-3RD GRADE LEARNING HUB in two public schools, Woodland Academy and the Canterbury Street Magnet School. They will be hubs where neighboring families obtain integrated education, health, and social services that enrich child development from before birth through grade three. Collaborating agencies will include the Family Health Center of Worcester and the Worcester Family Partnership.

Worcester is home to many newcomers from other countries, and families struggling to learn English and adapt may have difficulty accessing services if their children are in distress. The CENTER FOR HEALTH IMPACT, an innovator in health and education equity, has pioneered a program that helps immigrant and refugee parents communicate effectively with their children’s teachers and clinicians.

CHI prepares and employs interpreters who serve as cultural and linguistic navigators—a role that extends well beyond translation. Trained by CHI in the concepts and terminology of early childhood pedagogy and coached to handle complex meetings that convene a host of diverse specialists, the CHI navigator enables parents to understand the services that the child needs and avoid mistrust, shame, and fear.

A Foundation grant enables CHI to meet steep demand for these specialized interpreters from early intervention programs serving at-risk children who range from infants to eight-year-olds.

“As once apprehensive parents see the rationale of proposed services,” says Executive Director Joanne Calista, “they willingly take part in programs that benefit their vulnerable children.”

An Early Childhood Initiative partner and grantee from the start, EDWARD STREET CHILD SERVICES advocates on behalf of children, parents, and child care providers to increase the quality and affordability of early childhood education and improve the training and pay of its workforce. Spearheading a multi-year effort to elevate support and investment from city, business, education, and health sectors, Executive Director Eve Gilmore regards a recent milestone as a major step forward. “The city’s youth violence prevention program is elevating our early childhood agenda as a prevention strategy. This renowned program recognizes that by investing in a healthy start for our children, we raise a healthier and safer community.”
“Farm to table” is a popular trend in high-end dining. The phrase can also describe grantee projects that link neighborhoods in so-called “food deserts” with affordable, sustainable sources of fresh produce. Each creates a local food economy that connects residents with each other and nearby farmers and fosters healthier eating habits.

In 2016, the nonprofit Muslim Community Link introduced BLACK SEED FARMERS MARKET, which sells fresh produce from nearby farms and locally made foods such as cheese and honey. Its new indoor market runs five days a week in the Denholm Building, where many of its customers also access social services. Neighbors mingle with each other and the immigrant and refugee youth employed and mentored by Black Seed. “While gaining skills in running a business,” says Imrana Soofi, MCI founding director, “our young employees feel appreciated and part of their community.”

Serving South Worcester residents with low incomes and little access to fresh produce, JEREMIAH’S INN runs the city’s largest food pantry. From summer through fall, Jeremiah’s obtains produce grown to order from Community Harvest Project and hosts a 60-bed community garden. Seasonal farmers’ markets in University Park also offer local produce, and Jeremiah’s trains clients to shop for and prepare nutritious meals. “Many of our clients are elderly or single-parent households with young children,” says Executive Director Janelle Wilson. “They depend on SNAP, WIC, and senior coupons. We’re pleased that their coupons double in value at nearby farmers’ markets.”

After 17 years developing community gardens in low-income areas of North Central Massachusetts, GROWING PLACES is building on its local roots to reduce food insecurity region-wide. Executive Director Ayn Yeagle, a registered dietician, envisions local food hubs that bring fresh produce into the region’s food deserts. “All of our communities want more access to healthy, whole food,” says Ayn. “Lacking public transportation, they need nearby sources. With innovative strategies that involve residents and youth, our community gardens and local producers could be the backbone of a network connecting growers and consumers in both urban and rural communities.”

COMMUNITY HARVEST PROJECT is growing a community while relieving hunger. Each year, more than 8,500 volunteers produce about 250,000 pounds of fruits and vegetables and deliver their harvest to food pantries large and small. Volunteers arrive alone and in groups and return year after year. Groups from companies such as Dell have been coming for a decade. A team known as the Tuesday Crew has mastered tree pruning and cider making. “Our volunteers are drawn by our mission and beautiful settings,” says Executive Director Kat Edwards, “and the joy of working together on behalf of others.”
CATALYZING COMMUNITY THROUGH THE ARTS

Our Creative Engagement Initiative extends well beyond developing a Cultural Plan. In 2018, as one of five community foundations chosen by the Barr Foundation to join its Creative Commonwealth Initiative, we received a two-year $500,000 grant along with expert guidance to strengthen our cultural sector. In July, the Foundation awarded five arts organizations with grants of $30,000 to $70,000 and has convened the grantees bimonthly to learn and share best practices.

**ARTSWORCESTER**, celebrating its 40th anniversary, has a new home in the historic Printers Building, an incubation hub in the heart of downtown. The nonprofit is investing its grant in marketing, including multilingual outreach and a 2021 juried exhibition of artists new to the region, including refugees.

“We want our artists and audiences to reflect our region’s demographic diversity,” says Executive Director Juliet Feibel, PhD. “Audiences follow artists, and we are building a more diverse artist corps. This process will take time.”

**CROCODILE RIVER MUSIC** engages groups of all ages in the high-energy music, dance, and art of Africa. The grant and learning cohort are helping the organization, now in its seventh year, transition into an independent nonprofit. “We want to become a cornerstone institution, using our music to connect people,” says Zach Combs, co-founder and director. “You needn’t master African music to enjoy it. Playing it brings a smile to your face.”

“Chamber music too is about connection, the interaction of musicians with each other and the audience,” says Tracy Kraus, executive director of the **WORCESTER CHAMBER MUSIC SOCIETY**, founded in 2006 by Tracy and fellow musicians. The Society stages 20 concerts a year and runs an intensive strings program for city youth. With the grant, they added a third site serving refugee youth; doubled orchestra days to twice a week; expanded its free concerts; and hired a part-time grantwriter. “We want to grow,” says Tracy, “and connect more people through music.”

Artists living in Main South founded **MAIN IDEA** in 2011 as a free, weeklong summer arts program. With the grant, Main IDEA has more than doubled its programming and drawn more youth through activities including open mic nights, quarterly concerts, an after-school drama program, and a weekly teen arts program. “Our experiment worked,” says Executive Director Joy Murrieta, the nonprofit’s sole employee. “Through the arts, we are helping youth find their voice and cultivate a positive sense of self.”

Now celebrating its 160th season as a presenter of international performing artists, **MUSIC WORCESTER** is refashioning its website to fully support mobile devices and conducting its largest-ever digital advertising campaign. “Through our grant and learning cohort, we are gaining new tools to build and track audiences,” says Executive Director Adrien C. Finlay. “Our goal is to increase newcomers by 20 percent this season. But developing lasting relationships is a long-term process.”
A BETTER LIFE BEGINS WITH THE BASICS

For most people, employment is the main route to economic independence. But securing a job with a living wage along with decent and affordable housing can elude those who have little or no money or struggle with other major obstacles—including individuals in recovery from illness or addiction, women and children fleeing domestic violence, veterans, refugees, and the formerly incarcerated. Foundation grantees provide effective, compassionate assistance to men and women in need as they aspire to better lives.

DRESS FOR SUCCESS WORCESTER offers more than attire to its clients, women referred by social service agencies for support and preparation as they seek employment. While helping each woman select a flattering suit, staff and volunteers also provide coaching that includes resume feedback and interview role-plays.

Guidance continues once the woman secures a job. She returns for a smart, career-ready capsule wardrobe as well as a review of the strengths she brings to her employer. She is also invited to join a monthly career development group. “We level the playing field,” says Executive Director Justina Lachapelle, “by helping each woman see and present herself in the best light.”

A bus pass can be a ticket to opportunity, such as a job, or the means to reach a medical appointment. Each month, TASKS FOR TRANSIT provides a set of 10 free, all-day Worcester Regional Transit Authority bus passes to 27 social service agencies, which in turn distribute them to clients. “It’s a little thing that can change the arc of someone’s life,” says CEO Steve McClure. “These passes go to people who often choose between a meal and bus fare.” The nonprofit’s offerings for the newly employed, Job Fare Kits, include a 31-day WRTA bus pass, a voucher for a free haircut, and a $10 café debit card.

Transforming lives and neighborhoods, WORCESTER COMMUNITY HOUSING RESOURCES turns abandoned and condemned properties into quality affordable housing. When Ascentria Care Alliance needed a new home for 10 teenaged mothers and their children, WCHR found a building in an ideal location and in eight months converted it into a beautiful home tailored to residents’ needs. Another WCHR project turned a former chair-making factory in Gardner into a 78-unit, state-of-the-art assisted living facility, one of just two in the state exclusively serving low-income elders.

Also a certified property receiver, WCHR acquires abandoned properties, brings them up to code, and returns them to market as affordable housing. As commercial ventures, such projects can languish for years. “With our array of tools as both a developer and community lender, we can expedite these projects,” says Executive Director Dominick Marcigliano. “It’s rewarding to see blighted buildings quickly become quality homes.”

The next stop for new occupants might be FRESH START FURNITURE BANK, which provides families referred by social service agencies with high-quality donated furniture and housewares for free. “We stock just about everything to completely furnish a starter home,” says Geoffrey Schultz, president of Fresh Start, which in 2018 served 595 families. “Many people come to us with absolutely nothing. Our volunteer personal shoppers assist them in creating a well furnished home. We give people an uplifting experience.”
GRANT HIGHLIGHTS

On the following pages is a listing of organizations that received $1,000 or more from our discretionary, field of interest, donor advised, agency or designated funds. It is through the generosity of the many donors who established these funds that these grants are made. (Not included: grants made outside of Massachusetts and scholarship awards to individuals.)

2018 Grants by Fund Type

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Amount</th>
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<tr>
<td>Donor Advised</td>
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<td>Designated</td>
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<td>Scholarship</td>
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<td>Agency</td>
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A

Abby’s House $42,939
African Community Education Program $38,000
AIDS Project Worcester $3,390
Al-Hamra Academy $2,220
All Out Adventures $1,000
All Saints Episcopal Church $22,543
Alzheimer’s Association Massachusetts/New Hampshire Chapter $5,000
American Antiquarian Society $79,202
American Red Cross of Central and Western Massachusetts $10,250
Angels-Net Foundation $5,000
Anna Maria College $17,500
Ansaar of Worcester $3,180
Appalachian Mountain Club $5,000
Apple Tree Arts $16,250
Art in the Park, Worcester $10,100
ArtsWorcester $104,200
Ascentria Community Services $25,000
Assumption College $1,000
Athol Area YMCA $2,000
Auburn Youth and Family Services $10,000
Audio Journal $8,551

B

Bancroft School $44,512
Barton Center for Diabetes Education $5,000
Be Like Brit Foundation $6,350
Becker College $3,000
Best Buddies Massachusetts $4,000

C

Big Brothers/Big Sisters of Central Mass/MetroWest $20,000
Blackstone Valley Boys & Girls Club $7,500
Bosler Humane Society $1,850
Box 4 Special Services Canteen Association $1,000
Boy Scout Troop 159 $1,500
Boys & Girls Club of Lunenburg $5,000
Boys & Girls Club of Webster-Dudley $5,000
Boys & Girls Club of Worcester $65,604
Building Futures $19,500

Camp Putnam $10,500
Canal District Alliance $5,200
CASA Project $143,400
Catholic Charities Worcester County $13,000
Center for Health Impact $18,000
Center for Nonviolent Solutions $6,600
Central MA Housing Alliance $13,290
Central New England Equine Rescue $5,000
CENTRO $2,000
Children’s Dyslexia Center of Central Massachusetts $2,730
Children’s Friend $54,786
Clark University $19,290
Clinton Adult Learning Center $7,500
Coalition for a Healthy Greater Worcester $5,000
College of the Holy Cross $3,500
Community Harvest Project $74,550
Community Health Connections $5,000
Community Healthlink $28,456
Community Legal Aid $26,180
Community Servings $9,780
Congregational Church of Grafton $2,120
Creative Hub Worcester $2,500
Crocodile River Music $83,000
Cub Scout Pack 159 $1,500
DCF Kids Fund $25,000
Devereux Center of Massachusetts $2,340
Diocese of Worcester $56,490
Dismas House of Massachusetts $28,500
Dress for Success Worcester $5,470

Easter Seals of Massachusetts $1,771
EcoTarium $107,000
Edward M. Kennedy Community Health Center $42,735
Edward Street Child Services $85,000
Elder Services of Worcester Area $33,734

Family Health Center of Worcester $114,340
Family Services of Central Massachusetts $1,151
Fathering Fathers $2,500
First Baptist Church of Worcester $25,000
First Congregational Church of Shrewsbury $1,452
First Congregational Parish, Unitarian Petersham $17,750
First Unitarian Church $42,554
Friendly House $29,000
Friends of St. Luke’s $7,500
Friends of the Shrewsbury Public Library $7,500
Future Focus Media Cooperative $7,500

Gale Free Library $1,350
Gardner Community Action Committee $1,500
Gardner Public Schools $2,500
Genesis Club $29,500
Girl Scouts of Central and Western Massachusetts $8,415

Girls Inc., of Worcester $41,754
Grafton Land Trust $1,240
Grafton Little League $26,000
Greater Worcester Land Trust $9,650
Growing Places Garden Project $11,500

Habitat for Humanity MetroWest/Greater Worcester $7,500
Harrington HealthCare System $1,000
Harvest Fair Committee $3,500
Holden Senior Center $1,160
HOPE Coalition $138,360

Institute for Energy and Sustainability $15,000
Interfaith Hospitality Network of Greater Worcester $10,000

Jacob Edwards Library $1,500
Jeremiah’s Inn $12,090
Jesus Life Center United Methodist Church $10,000
Jewish Federation of Central Massachusetts $2,505
Joshua Hyde Public Library $1,090
Joy of Music Program $19,970

Kennedy Donovan Center $12,000
Kids Cafe of Worcester $4,000

Latin American Health Alliance of Central MA $10,000
Latino Education Institute of Worcester State University $43,000
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<td>Leicester Christmas Display</td>
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<td>Leicester Little League</td>
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<td>LGBT Asylum Support Task Force</td>
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<td>Make-a-Change</td>
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<td>Massachusetts Education and Career Opportunities</td>
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<td>Milford Youth Center</td>
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<td>Millbury Memorial Jr./Sr. High School</td>
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<td>Montachusett Interfaith Hospitality Network</td>
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<td>Music Worcester</td>
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<td>Muslim Community Link</td>
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<td>Nativity School of Worcester</td>
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<td>NEADS (National Education for Assistance Dog Service)</td>
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<td>NEADY Cats</td>
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<td>North Brookfield Youth Center</td>
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<td>North Quabbin Citizen Advocacy</td>
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<td>Notre Dame Health Care Center</td>
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<td>Oak Hill Community Development Corporation</td>
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<td>Old Sturbridge Village</td>
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<td>Opera New England of Northeastern CT</td>
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<td>Operation Outreach-USA</td>
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<td>Our Father’s House</td>
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<td>Parent/Professional Advocacy League</td>
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<td>Pathways for Change</td>
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<td>Problem Pregnancy of Worcester</td>
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<td>Quinsigamond Community College Foundation</td>
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Rachel’s Table $13,500
Rainbow Child Development Center $20,820
Reach Out and Read $10,000
Refugee and Immigrant Assistance Center $20,000
Regatta Point Community Sailing $5,000
Regional Environmental Council $23,500
Render Creative/Main IDEA $30,000
Restorer of Broken Bridges $11,500
Rise Above Foundation $5,000
Rural Cemetery & Crematory $62,940

Salisbury Singers $2,000
Salvation Army Worcester Citadel Corp $12,005
Saori Worcester $7,500
Second Chance Animal Shelter $12,890
Senior Citizen Club of Leicester $2,000
Seven Hills Foundation $15,565
Shine Initiative $17,500
Shrewsbury High School $1,000
Shrewsbury Public Library $2,300
Skyline Technical Fund $1,000
South Worcester Neighborhood Improvement Corporation $1,500
Southeast Asian Coalition of Central Massachusetts $41,500
Spanish American Center $11,800
St. Anne and St. Patrick Parish $4,000
St. Anne’s Church $2,500
St. Columba Catholic Church $1,250
St. John’s Food for the Poor $4,000
St. John’s High School $1,000
St. Joseph and St. Pius X Parishes $3,220
St. Mary School $2,500
Steven Schwartz Magician $7,500
Straight Ahead Ministries $27,500

Tantasqua Education Foundation $2,000
Tasks for Transit $6,500
Tenacity $7,500
Thayer Memorial Library $7,350
Town of Grafton $1,000
Town of Leicester – Burncoat Park Sports Planning Committee $5,000
Tri-Community YMCA $10,000
Tri-Parish Community Church Food Pantry $2,500
Tri-Valley, Inc. $10,000
Trinity Lutheran Church $32,782

UMass Memorial Foundation $55,834
United Presbyterian Church of Whitinsville $3,110
United Way of Central Massachusetts $268,230
United Way of Tri-County $3,600
University of Massachusetts Graduate School of Nursing $1,000
Veterans, Inc. $5,100
Visitation House $6,000
VNA Care Network and Hospice $5,920
Volunteers of America Massachusetts $1,000
Worcester Academy $42,015
Worcester Anti-Foreclosure Team $7,500
Worcester Art Museum $234,000
Worcester Center for Crafts $20,843
Worcester Center for the Performing Arts $14,500
Worcester Chamber Music Society $94,039
Worcester Common Ground $10,000
Worcester Community Action Council $11,870
Worcester Community Housing Resources $10,000
Worcester County Food Bank $22,365
Worcester County Horticultural Society $35,501
Worcester County Mechanics Association $7,500
Worcester County Poetry Association $5,350
Worcester Cultural Coalition $15,000
Worcester Earn a Bike $4,670
Worcester Education Collaborative $15,500
Worcester Foundation for Biomedical Research $4,221
Worcester Historical Museum $191,830
Worcester Impact on Sexual Health $5,000
Worcester Interfaith $17,050
Worcester Jewish Community Center $15,150
Worcester Polytechnic Institute $10,000
Worcester Public Library Foundation $9,520
Worcester Public Schools $14,790
Worcester Refugee Assistance Project $12,000
Worcester Regional Research Bureau $11,180
Worcester State Foundation $4,660
Worcester Technical High School $6,771
Worcester Youth Center $52,500
Worcester Youth Orchestras $9,181

Y.O.U., Inc. $90,280
Yes We Care $3,000
YMCA of Central Massachusetts $32,365
YWCA of Central Massachusetts $94,680
NAMED FUNDS

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

DIRECTOR & CORPORATORS COMMUNITY IMPACT FUND
- Eliza D. and Cora J. D. Dodge Fund (1985)
- EMC Community Fund (2000)
- Environmental Grantmaking Fund (2002)
- Fallon/OrNda Community Health Fund (1996)
- Marion Stoddard Fletcher Fund (1992)
- Warner S. and Mary F. Fletcher Discretionary Fund (2017)
- Founders Fund (1983)
- Samuel Frank Charitable Fund (1993)
- Garfield Berry Fund (1998)
- Ragnhild L. Gersdorf Fund (1994)
- Haskell and Ina Gordon Fund (1980)
- Jeppson Memorial Community Fund (1976)

DIRECTOR & CORPORATORS COMMUNITY IMPACT FUND
- Directors and Corporators Community Impact Fund (2007)
- Eliza D. and Cora J. D. Dodge Fund (1985)
- EMC Community Fund (2000)
- Environmental Grantmaking Fund (2002)
- Fallon/OrNda Community Health Fund (1996)
- Marion Stoddard Fletcher Fund (1992)
- Warner S. and Mary F. Fletcher Discretionary Fund (2017)
- Founders Fund (1983)
- Samuel Frank Charitable Fund (1993)
- Garfield Berry Fund (1998)
- Ragnhild L. Gersdorf Fund (1994)
- Haskell and Ina Gordon Fund (1980)
- Jeppson Memorial Community Fund (1976)

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- Directors and Corporators Community Impact Fund (2007)
- Eliza D. and Cora J. D. Dodge Fund (1985)
- EMC Community Fund (2000)
- Environmental Grantmaking Fund (2002)
- Fallon/OrNda Community Health Fund (1996)
- Marion Stoddard Fletcher Fund (1992)
- Warner S. and Mary F. Fletcher Discretionary Fund (2017)
- Founders Fund (1983)
- Samuel Frank Charitable Fund (1993)
- Garfield Berry Fund (1998)
- Ragnhild L. Gersdorf Fund (1994)
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- Jeppson Memorial Community Fund (1976)

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- Warner S. and Mary F. Fletcher Discretionary Fund (2017)
- Founders Fund (1983)
- Samuel Frank Charitable Fund (1993)
- Garfield Berry Fund (1998)
- Ragnhild L. Gersdorf Fund (1994)
- Haskell and Ina Gordon Fund (1980)
- Jeppson Memorial Community Fund (1976)
Lund Pioneer Fund (2010)
Main South Fund (1999)
Frances F. Mansfield Discretionary Fund (1996)
Barbara S. Massey Fund (2000)
Organization Assistance Fund (1996)
Partnership Fund (1990)
Marlene and David Persky Fund (1997)
Quota International of Worcester Fund (1998)
Melvin and Martha Rosenblatt Fund (1985)
Carol L. Seager Fund (2014)
Seven Hills Youth Fund (1995)
Norman L. and Dorothy A. Sharfman Fund (2004)
Sumner Lee Sharfman Fund (1984)
Shepherd Knapp School Fund (1979)
Evelyn and Sumner Silver Fund (2007)
H. Arthur Smith Funds (1986)
Isaac Southgate Fund For Leicester (2010)
Spag’s Supply Fund (1986)
Harry G. Stoddard Fund (1992)
Gilbert H. Sundberg Fund (1987)
D. Russell and Atsye S. Taft Fund (1992)
Corinne Charron Turner Fund (1986)
Mr. and Mrs. Robert H. Wetzel Fund (1983)
Robert J. and Anne C. Whipple Fund (1997)
Irving N. and Annabel Wolfson Fund (1998)
Worcester County Deputy Sheriffs Association Fund (1999)
Worcester Credit Bureau Fund (1992)
Youth Opportunity Fund (1981)

**DONOR ADVISED FUNDS** allow donors to suggest grants at their convenience.

ACAR Fund (2018) **NEW**
Rosalind Lee and Victor Ambros Fund (2014)
Elkanah B. Atkinson Community and 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 Rowe Buonomo Fund (2013)
George S. and Tammy Butler Fund (2007)

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**ACAR Fund**

The Association of Central African Republic Families has created this donor advised fund to support clean water and basic health services for the people of the Central African Republic (CAR). Founded in 2012, the Worcester-based organization’s members include several hundred refugees resettled in the United States and Canada, along with friends and supporters.

“Refugee families were forced to flee when their villages were attacked,” says the organization’s treasurer Noreen Smith, chief development officer of the Family Health Center of Worcester and a former Peace Corps volunteer in the CAR. “When stability returns, this fund will be used to establish a health clinic to care for neighbors who remain in the country.”

“These families have suffered tremendous trauma and loss,” says Noreen. “While working multiple jobs to make ends meet, they sacrificed to build this fund. The Foundation is a wise choice to safeguard and grow these hard-earned dollars, and make it easier for others to contribute.”

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**NEW FUND**
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)
Herlihy Family Memorial Fund (2017)
Frances M. Herron Fund (1997)
J and J Fund (2014)
Jeppson Memorial Fund for Brookfield (1976)
Shirley S. Kane Family Fund (2014)
Keamy Fund (2014)
William and Maureen Kelleher Charitable Fund (2008)
Kirby Foundation Fund (2007)
Augusta H. Kressler, M.D. Fund (2002)
George and Anna Krikorian Family Fund (1994)
LaVigne Family Fund (1992)
Leicester Savings Bank Fund (1997)
Peter H. and Catherine H. Levine Fund (2007)
MacLean Family Fund (2004)
Donald J. and Tina Mancini Family Fund (2014)
Charles H. McDonald Memorial Foundation (2005)
C. Jean and Myles McDonough Fund (1988)
Winifred Meany Killay and Matthew Meany Memorial Fund (2003)
Mitra Family Joy Guru Fund (2013)
Barrett and Mahroo Morgan Donor Advised Fund (2008)
John M. Nelson Fund (1990)
Nunley Family Fund (2013)
Pakachoag Church Fund for Human Understanding (1999)
PEACE Fund (2014)
PENTA Legacy Fund (2016)
Town of Petersham Fund (1984)
Pitcher Family Fund (2014)
Pyle Fund (1986)
Marla Maykel Pyle Fund (2001)
Rawji Conservation Fund (2013)
Mary and William Ritter Fund (2018)
Dan Salmon Fund (2015)
Salois Family Fund (2010)
SASA Fund (2011)
Charles E. Scott Community Fund (1997)
Mark and Elise Seeley Fund (2018)
Stillman Family Fund (2017)
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. Wetzl Memorial Scholarship Fund (2012)
Todd H. Wetzl 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)

SCHOLARSHIP FUNDS support college tuition for area students.

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)
Charlon 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)
Melanie Davidian Memorial Scholarship Fund (2017)
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)
Fitchburg Sportsmen’s Club Scholarship Fund (2009)
Marilyn M. and Russell S. Fox Scholarship Fund (2010)
Janet Fraser Scholarship Fund (1999)
John F. Freeland Memorial Fund (2005)
Friends of Rutland Heights Hospital Permanent Fund (1993)
Judge and Mrs. William Garbose Fund (1998)
Derek Gaudette Memorial Scholarship Fund (1997)
General Scholarship Fund (1990)
Paul M. Gervais Memorial Music Scholarship Fund (2018) NEW
Matthew Gignac Memorial Scholarship Fund (1999)
Grantee Agency Scholarship (1996)
Greg’s Grant Fund (1997)
Grynse1 Educational Scholarship Fund (2006)
Daniel Ha Memorial Scholarship Fund (2015)
Emil Haddad Jazz Scholarship Fund (2004)
George W. Hanson Memorial Scholarship Fund (2015)
Marty Hastings Memorial Scholarship (2010)
Hedin Family Memorial Scholarship Fund (2007)
Maureen Henrickson Memorial Scholarship Fund (2004)
Charles Hugo Community Service Award Fund (2007)
Debbie Anne Johnson Memorial Fund (1993)
Ken and Pat Jones Scholarship Fund (2014)
Jenica Lynn Junnila Memorial Scholarship Fund (2000)
Deborah A. Kaufman Scholarship Fund (1990)
Lawrence M. and Augusta L. Keeler Scholarship Fund (1978)
Bradford J. Kemp Scholarship Fund (2008)
Max H. and Eloise A. Kuhner Scholarship Fund (2009)
Leicester High School Football Alumni Scholarship Fund (2007)
Leicester Samaritan Nursing Association Fund (1996)
Paul M. Gervais Memorial Music Scholarship Fund

Paul M. Gervais (1955 – 2013) loved to share the joy of music with his family and community. A graduate of Doherty Memorial High School (’73) and Fitchburg State College (’77), Paul played the trumpet but didn’t stop there. Music was a constant presence in his home and in his business—Kurlan Music Center in Worcester, a renowned hub for musicians and highly regarded source of instruments and music services. Paul provided his expertise to musicians, schools, churches and charity events. “He was very generous to all with his time and resources,” says Cathy Gervais, Paul’s wife.

Music was Paul’s life and now his legacy through this fund, created by his family and friends. Each year, a $1,000 scholarship will be awarded to a high school senior interested in music. “Paul found ways to bring music to as many people as possible,” says Cathy. “Through this scholarship, we will continue to spread his gift of music to others.”

Margaret G. Wolcott Scholarship Fund

Shrewsbury native Margaret G. (Smith) Wolcott died in March 2018 at age 99 after a long and productive life. By creating this scholarship through a bequest, Margaret is investing in future generations of young people from her beloved hometown who share her aspiration for a full life.

A 1937 graduate of Shrewsbury High School, Margaret earned a BA from Lasell College and later, a master’s degree from Fairchild Business School. While she and her husband Robert raised their son, Robert, Jr., Margaret progressed in her career, and at C.K. Smith, a heating oil supplier in Worcester, advanced to director and part owner.

Although Margaret outlived her husband and son, she continued to nurture her family and community ties throughout her life. She was a proud grandmother, great-grandmother and aunt. Through Margaret’s generosity, graduating seniors of Shrewsbury High School will receive scholarships based on academic achievement and financial need each year.
Andrew Sala Memorial Scholarship Fund (1998)
Doris Salzer Memorial Scholarship Fund (2012)
Herbert D. Sherwin Memorial Scholarship Fund (2004)
Claudia Simonian Scholarship Fund (2007)
Arthur J. Smith and Dorothy G. Smith Scholarship Fund (2005)
Francine “Doc” Smith Scholarship Fund (2013)
Steelman Expository Writing Scholarship Fund (1999)
Swedish National Federation Fund (2001)
Tahanto Regional High School Scholarship Fund (1997)
Paul E. Tarkiainen Art Award Fund (1995)
Cynthia and Harrison Taylor Scholarship Fund (2017)
Kathleen Terry Memorial Scholarship Fund (2005)
Robert Thomson Scholarship Fund (2009)
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)
Margaret G. Wolcott Scholarship Fund (2018)
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)

**DESIGNATED FUNDS** support one or more organizations in perpetuity.

Abby’s Empowerment Fund (2009)
Hollis E. and Gwendolyn D. Alden Fund (1977)
Clarence S. Arms Family Fund (1986)
Joan T. Barry Fund for Saint Mary School (2016)
Elizabeth Trumbull Barton Fund (2004)
Edward W. Bettke Scholarship Fund (2007)
Bolton Public Library Endowment Fund (2012)
Barbara Allen Booth Fund (2001)
Bosler Humane Society Fund (1986)
Bruce Breger Memorial Fund for BSA Troop 1 of Northboro (2010)
Brigham Hill Fund (2016)
Dr. and Mrs. Edward Budnitz Fund (1995)
Cancer Care and Research Fund (1991)
Polly C. and Joseph R. Carter Fund (1987)
Richard and Deanna Chaves Fund (2011)
Chesson Family Fund (1991)
Charles P. Ciaffone and Rose B. Ciaffone Fund (2005)
Eleanor Laing Clifford Fund (2016)
Martha A. Cowan Fund (1987)
Crater-Ferraro Fund (2018)
Ethel S. Cunningham Fund (1987)
Sarah B. and Dix F. Davis Fund (2002)
David L. and Elizabeth O. Dean Fund (2012)
Densmore Community Fund (2011)
Directors and Corporators Fund (1984)
Douglas Center Cemetery Preservation Fund (1999)
Gerald J. and Dallas M. Eydenberg Fund (2011)
Norma Feingold Worcester History Prize Fund (2011)
Shirley Feldman Fund (2005)
First Congregational Parish, Unitarian Fund (2006)
First Unitarian Church Fund (2006)
Patricia Fisher Fund (2006)
Paris and Marion S. Fletcher Fund for United Way (1992)
Marilyn M. and Russell S. Fox Scholarship Fund for Non-Traditional Students (2010)
Samuel Frank Designated Fund (1993)
Kimberley Lane Godard Memorial Fund (2012)
Lois B. and Robert F. Green Fund (2001)
Harris Family Fund (2001)
Rosemary Marble Harris 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)
Hopkinton farm, Ken Crater and Peg Ferraro brought the program to Grafton 20 years ago.

Now a nonprofit organization with a board and a small staff, Community Harvest Project draws thousands of volunteers who grow on average 250,000 pounds of produce each year for hunger relief. Most of the produce goes to Worcester County Food Bank.

“Our nonprofit has a dual mission,” says Ken. “We grow nutritious produce to relieve hunger and give families a healthy start. We also raise the quality of life in our community. Bringing neighbors together to solve a problem—hunger—volunteers roll up their sleeves to benefit others and connect with one another:”

A new designated fund makes it easy for neighbors to invest in CHP and sustain its dual mission. “The Foundation is an ideal partner,” says Ken. “It’s a trusted, community-based organization that can grow our fund in perpetuity.”

Robert M. Hyde Family Fund for Beaman Memorial
Public Library (2014)
Jeppson Memorial Fund (1976)
Jiji’s Fund (1999)
Marcia R. Katter Memorial Fund (2001)
Lawrence M. and Augusta L. Keeler Fund (1997)
Paul J. and Dorothy B. Kervick Fund (1996)
Peter J. and Sophie Kosky Fund (1988)
Max H. and Eloise A. Kuhner Memorial Fund (2005)
Nathaniel A. Lane Memorial Fund (2014)
Prescott N. Lane Memorial Fund (2014)
Peter H. Levine Fund (2010)
Peter H. Levine and Catherine H. Levine Fund
for the First Unitarian Church (2010)
John W. Lund Fund (1993)
Lund Leadership Award (2010)
Lund Unitarian Church Fund (2011)
Frances F. Mansfield Fund (1996)
Sonia Werblin Masterman Fund (2001)
Howard J. and Dorothy R. McGuinness Funds (2004)
Micah Housing Corporation Fund (1981)
Barrett and Mahroo Morgan Fund (2007)
Vasiliky Strates Moschos Memorial Fund (2002)
Rani P. and Haribabu Muddana MD Fund (2001)
Marc Needleman Memorial Fund (2000)
Nichols Academy Scholarship Fund (2001)
Christopher J. Paskell Memorial Fund (2004)
Paul M. Pezzella Fund in Memory of Patsy and
Theresa Pezzella (1999)

Pomfret Community School Arts Fund (2006)
Practical Education Fund (2010)
Lillian S. Pratt Fund (2007)
Hon. James F. Queenan Legal Services Fund (2011)
John and Gloria Rauth Library Fund (2001)
Renaissance Award Fund (2004)
Louise R. and John F. Reynders Fund (1987)
Marvin Richmond Fund (1998)
Chapin Riley Fund (2000)
John E. and Ethel E. Riley Outstanding Citizenship
Award Fund (2010)
Katharine Higgins Riley Fund (1991)
Marion & Arthur Rossiter Fund for Evangelical
Congregational Church (2011)
Saul A. Seder Fund (1991)
Khazma A. Soffan Memorial Fund (2000)
Thurston E. Solomon and Everett J. Morter Memorial
Fund (2013)
Helen M. and Thomas B. Stinson Fund (2001)
Robert and Helen E. Stoddard Fund for United Way
(1999)
Jean R. and Susan A. Therriault Fund (2017)
Carmen Tobin Nursing Scholarship Fund (1995)
Polly and Dick Traina Fund for Y.O.U., Inc. (2009)
William D. Wallace Executive Director Endowment
Fund (2014)
Mary Louise Wilding-White Fund (1978)
Harold Davis Woodbury Fund (1987)
Worcester Art Museum Booth Family Fund for Education
and Outreach (1999)
ArtsWorcester Fund

Celebrating it 40th anniversary in 2018 as the go-to resource for artists in Greater Worcester, ArtsWorcester began designing a new dream home and building a permanent endowment.

“Our longstanding dream has been to have a gallery accessible to all as well as an endowed fund to sustain us for decades to come,” says Executive Director Juliet Feibel, PhD. “Now, we’re gaining a home available to all, built for art. And by creating our endowment with the Foundation, we’ll sustain our future.

“With our endowed fund, we’ll benefit from the Foundation’s investment expertise, and we begin to give back. We’re now donors to the Foundation, which has helped us reach this happy juncture through decades of grants, guidance, and valuable training from its Nonprofit Support Center.”

ArtsWorcester will be the street-level occupant of the historic Printers Building, an incubation hub owned by Davis Publications, art textbook publishers. “We’ll be the face of the building,” says Juliet, “open to the heart of downtown.”

Dismas House Fund

Dismas House of Massachusetts began its 30th year by creating an endowed agency fund.

“Our work is not the easiest to fund,” David McMahon, co-director of the nonprofit, which prepares former prisoners to return to the community. “The Foundation was among our first supporters, understanding that successful reentry benefits the community as a whole. This new endowment will complement our multi-tiered fundraising through private and public sources, farm sales, and events as an investment in our future.”

Dismas House programs include a 35-acre farm in Oakham, where residents sustain the farm through their work; and a solar energy project that reduces the Farm’s electric bills. Dismas expertise in clean energy has led to a community-wide clean energy advocacy initiative. Its legal advocacy program, BAR None, helps former prisoners overcome barriers to employment and reduces incarceration of first offenders.

“Through its grants and Nonprofit Support Center, the Foundation strengthens bonds among nonprofits,” says David. “We are thankful that our community stands behind us.”
Patricia A. Fletcher Fund for Worcester Historical Museum

Worcester Historical Museum created this agency fund with a $2.5 million bequest from its long-serving trustee, Patricia Allen Fletcher.

A third-generation Worcester native, Pat graduated from Connecticut College, earned a master’s degree in library science from Columbia University, and spent most of her life in New York City, enjoying cultural pursuits and world travel.

In 1997, after the onset of a serious health condition, Pat returned to Worcester and turned her formidable talents to her hometown, serving on the boards of the Worcester Historical Museum and the Audio Journal, among others.

“Pat believed that understanding our history makes us better citizens,” says Executive Director William D. Wallace. “She believed Worcester’s strong future is rooted in its past of diversity, innovation, and enterprise. Pat was a fierce and spirited advocate of this museum as the place to tell the stories of all who live here in the region. With her magnificent gift, Pat helps us grow in perpetuity as the people’s museum.”

Friends of the Gladys E. Kelly Public Library Fund

In 2018, the town of Webster gained a handsome new library along with an endowment to expand library programs and resources now and for decades to come.

Already benefiting library patrons, the endowment will fund new programs that include classes in nutrition, basic finance, and job skills; a spring music series; authors’ readings; and the purchase of laptop equipment and software.

The Friends of the Gladys E. Kelly Public Library led a robust fundraising campaign—their first—and raised $1.9 million to create the endowment and help pay construction costs. “When we reached $500,000, we knew we needed professional fund management,” says Tom Klebart, president of the Friends, an all-volunteer nonprofit. “We looked at investment firms. Other nonprofits, including libraries, told us about the Foundation, which became our trustees’ unanimous choice.

“We’re excited to partner with the Foundation, which provides excellent fund management and reinvests in our community.”

In 2018, the Northborough Free Library celebrated its 150th anniversary as a beloved hometown library.

“We celebrated the entire year,” says Ellen Church, of the Friends of the Northborough Library, a nonprofit that funds museum passes and projects not covered by the town budget, including educational, cultural and social events. “We capped our celebration by creating a fund to support such programs over the next 150 years. Our fund is only going to grow with time.”

Starting an endowment was a first for the Friends, who were accustomed to raising funds through private donations and annual book sales. But after receiving a sizeable bequest, the Friends decided to invest in the library’s future. “Foundation leadership came to a meeting and helped us understand how the endowment would work and benefit the library,” says Ellen. “We all voted to establish the fund with the Foundation, which has been helping our region for a very long time.”

Friends of the Northborough Library
India Society of Worcester Fund

Families of Indian descent form a large and vibrant population in the region, and many belong to the India Society of Worcester, a volunteer-run nonprofit that offers members a rich array of social and cultural activities.

The Society also provides services and events that engage the broader community, such as its free health clinic that delivers medical care to the underserved; and its wildly popular India Day celebration held in August at the DCU Center.

“When we started in 1963, we were helping college students find a bit of home away from home,” says Ashish Cowlegi, Society president. “Drawn by the quality of life and good schools in nearby towns, they raised families here, and so have their children. Now, we focus on sharing our strengths and our culture.

“Our new agency fund is part of this strategy. While we are impressed with the Foundation’s financial results, we also join many other non-profits and deepen our relationships within the community.”

Music Worcester Young Artist Competitions Fund

With a generous bequest from the estate of Paul E. Shannon DMD, Music Worcester created this agency fund, which will establish the Dr. Paul E. Shannon Memorial Prize.

The prize will recognize the top performer in the vocal component of the annual Young Artists Competitions of Music Worcester.

“With the passing of Dr. Shannon in 2016, we lost a long-standing patron,” says Adrien C. Finlay, executive director of Music Worcester. “His mom, who with his aunt sang in our chorus, started bringing him and his brother Robert to our concerts when he was just four years old.”

A highly regarded musicologist, Dr. Shannon served as a judge of the Competitions for many years and was the main pre-concert lecturer for Music Worcester’s orchestral events.

On March 4, 2017, Music Worcester brought the Venice Baroque Orchestra to Mechanics Hall to perform Antonio Vivaldi’s “The Four Seasons” on period instruments and dedicated the concert to the memory of Dr. Shannon.
Wachusett Greenways Fund

Wachusett Greenways began connecting the Wachusett communities with trails and greenways in 1995. The nonprofit group partners with town, state and federal agencies, foundations, businesses, volunteers and members working to complete 30 miles of the Mass Central Rail Trail. Meanwhile other groups across the Commonwealth are working to complete the 104 mile route between Northampton and Boston.

Celebrating the 20th birthday of opening the first Worcester County section of the Mass Central Rail Trail last year, Wachusett Greenways hosted a 20-cake party and ribbon cutting for Central Mass supporters and the community.

The all-volunteer nonprofit also marked the year by creating an endowment for its future. “People will enjoy this trail for generations to come,” says Colleen Abrams, president. “The Foundation is a natural partner for sustaining our longevity.

Twenty years ago, the Foundation gave us a first grant to help establish the Springdale Mill Historic Site along the rail trail. Together, we work to enhance our community for the long-term.”

Worcester County Poetry Association Contest Fund

Susan Elizabeth Sweeney, PhD, poet, sculptor and professor of arts and humanities at the College of the Holy Cross, has created this fund on behalf of the Worcester Country Poetry Association to endow its annual College Poetry Competition, which she founded in 2008.

Its grants will fund two annual cash prizes: the Elizabeth Bishop Manuscript Prize and the Etheridge Knight Performance Prize, named by Doctor Sweeney to honor two world-renowned poets who were deeply influenced by Worcester.

“Now five Foundation funds benefit our organization,” says Rodger Martin, president of the WCPA, which since 1972 has run readings, workshops, and events and also publishes a literary journal, The Worcester Review. The first fund was established by Worcester native Stanley Kunitz (1905-2006), the nation’s tenth poet laureate.

“We’re a small nonprofit without the resources to manage these funds,” says Rodger. “Foundation stewardship works beautifully, eliminating overhead and freeing us to do what we’re good at— supporting poetry.”

MassEdCO Fund (2017)
Matthew 25 Funds (2000)
Millbury Public Library Endowment Fund (1991)
Music Worcester Education Fund (2016)
Music Worcester Young Artist Competitions Fund (2018) NEW
National Memorial Trust Fund (1990)
Preservation Worcester Endowment Fund (2011)
Quinsigamond Community College Foundation Inc Endowment Funds (2016)
Rural Cemetery Fund (2006)
St. Mary’s Assumption Albanian Orthodox Church Endowment Fund (2012)
Straight Ahead Ministries Fund (2015)
Tatnuck Brook Watershed Fund (1996)
United Way of Central Massachusetts Fund (1987)
Visitation House Inc. Fund (2017)
Wachusett Greenways Fund (2018) NEW
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 College Contest Fund (2018) NEW
Worcester County Poetry Association Funds (2002)
Worcester Jewish Community Center Fund (2010)
Worcester Public Library Fund (1992)
Youth Opportunities Upheld, Inc. Fund (1987)
THE ACORN SOCIETY: CREATING YOUR LEGACY

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

Acorn Society members are invited to attend donor education and appreciation events. 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.

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

A BEQUEST INVESTS IN A TRUSTED PROCESS

A decade ago, Dix and Sarah Davis created a bequest to the Foundation in their will. Their planned gift will fund causes chosen at the discretion of the Foundation.

“When I served on the board of the Foundation,” says Dix, “I was very impressed with its effort to help so many, and the care with which its committees select grantees and evaluate outcomes.” Dix currently chairs the grantmaking committee of the Foundation’s Fallon OrdNda Community Health Fund.

“Dix has participated for years in the entire grantmaking process, which makes giving through the Foundation particularly meaningful to us,” says Sarah. “And we know that our bequest will be applied where it can do the most good in this region that is our home.”
CONTRIBUTORS

The Foundation received over $7.7 million in gifts during 2018. We list those who contributed $250 or more by fund type and extend our sincere gratitude to all who made a gift during the year.

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

Gifts to **DISCRETIONARY & FIELD OF INTEREST FUNDS**
- Barr Foundation
- Shari and Paul Belanger
- Janet Carrick Residuary Trust
- Tucker M. Clark
- Fletcher Foundation
- Estate of Patricia A. Fletcher
- Sona Huisian Trust
- Arthur and Janet Jones Charitable Trust of Fidelity Charitable
  - Janet S. Jones
- John and Rayna Keenan
- Melvin Rosenblat
- Estate of Sumner Silver
- Stoddard Charitable Trust

Gifts to **DONOR ADVISED FUNDS**
- Anonymous (2)
- ACAR (Association of Central African Republic)
- Janice Ahola-Sidaway
- Saul J. and Sandra J. Ahola
- Mary K. Alexander
- John and Ann Marie Argitis
- Elizabeth and Ned Bacon
- Bank Hometown
- Bartholomew & Company, Inc.
- Robert Beauregard
- Robin Beauregard
- Law Office of Todd D. Beauregard, PC
- James R. Buonomo and Paula Rowse Buonomo
- Center for Health Impact
- Charter Oak Credit Union
- James J. Convery and Tracy Craig
- Carolyn S. Crane
- Melvin S. Cutler Charitable Foundation
- Ross K. and Lisa F. Dik

**2018 GIFTS by FUND TYPE**

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor Advised</td>
<td>$1.23</td>
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<tr>
<td>Designated</td>
<td>$0.74</td>
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<tr>
<td>Scholarship</td>
<td>$0.54</td>
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<tr>
<td>Discretionary and Field of Interest</td>
<td>$0.80</td>
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<tr>
<td>Agency</td>
<td>$4.46</td>
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<tr>
<td><strong>Total Gifts</strong></td>
<td><strong>$7.77 Million</strong></td>
</tr>
</tbody>
</table>

**2018 GIFTS by**

**FUND TYPE**

**Barr Foundation**
**Shari and Paul Belanger**
**Janet Carrick Residuary Trust**
**Tucker M. Clark**
**Fletcher Foundation**
**Estate of Patricia A. Fletcher**
**Sona Huisian Trust**
**Arthur and Janet Jones Charitable Trust of Fidelity Charitable**
**Janet S. Jones**
**John and Rayna Keenan**
**Melvin Rosenblat**
**Estate of Sumner Silver**
**Stoddard Charitable Trust**

**DONOR ADVISED FUNDS**

- Anonymous (2)
- ACAR (Association of Central African Republic)
- Janice Ahola-Sidaway
- Saul J. and Sandra J. Ahola
- Mary K. Alexander
- John and Ann Marie Argitis
- Elizabeth and Ned Bacon
- Bank Hometown
- Bartholomew & Company, Inc.
- Robert Beauregard
- Robin Beauregard
- Law Office of Todd D. Beauregard, PC
- James R. Buonomo and Paula Rowse Buonomo
- Center for Health Impact
- Charter Oak Credit Union
- James J. Convery and Tracy Craig
- Carolyn S. Crane
- Melvin S. Cutler Charitable Foundation
- Ross K. and Lisa F. Dik

**SCHOLARSHIP FUNDS**

- Anonymous (2)
- Irene M. Adamaitis
- Advantage Benefits Group
- Alberto’s Ristorante

Daniel L. Fontaine
Barbara H. Gaudette
Gerardi Insurance Services, Inc.
David R. Grenon
Guru Tax & Financial Services, Inc.
Herlihy Insurance Group
Arthur H. and Elizabeth A. Jay
Robert D. Johnson
George O. Kataja Jr.
Donald and Yvonne Keamy Family Foundation
Kirby Foundation
Paul D. Lefrancois
Mildred H. McEvoy Foundation
Ruth and Peter Metz Family Foundation
Putnam Bank Foundation
Marla Maykel Pyle
Richard L. Pyle
Gail T. Randall
Mary C. and William J. Ritter
Paul R. Rossley
Richard N. Rust
Joe and Joanne Salois
Donna R. C. and John E. Sansoucy
Mark Seeley and Elise Forbes Seeley
Leonard Sidaway
Barbara Crabtree Simonetta
The Ivy Society
Gale and Philip Torgersen Fund of Fidelity Charitable Gift Fund
Ann Laura Wasgatt
Worcester County Food Bank
Norman Bitsoli
Carrick Foundation
Janet Carrick Residuary Trust
James Coonan
Melvin S. Cutler Charitable Foundation
David French Music Co., Inc.
Patricia L. and Attila L. Dorogi
Heather and John F. Duke Jr.
Christina D. Economos
Phyllis Edinberg
Educational Association of Worcester
Robert E. Evans and Kathleen K. Evans Family Foundation
Peggy and Edwin J. Fedeli, Jr.
Feingold Companies
Fels Family Foundation
George E. Freeland
George T. Gilson
Hossein Hakim
Hanover Insurance Group Foundation, Inc.
Richard E. Hedin
Patricia A. Hertzfeld
Horich Hector Lebow Advertising
Lisa L. Hugo
InterGlobal Communication Group
Kathryn Johnson
Deborah A. Kaufman
Priscilla Short Kerr
Leonard Kraus
Learning First Foundation
Andrea Lightbown
Ann B. Logan and Christopher C. Eccles
Mastermans, LLP
Terrence M. McMahon
Medtronic Foundation Volunteer Grant Program
Middlesex Savings Charitable Foundation
J. Roger Ouellette
Jeffrey Picherri
William J. Sands
Richard Simonian
Scott A. Sinder
Sneakerama, Inc.
Brienne E. Spellane
Robert Spellane
David C. Steelman and Virginia Theo-Steelman
Telegram & Gazette
Sumner B. Tilton Jr.
David N. Tinsley
Susan and Michael Tolar
Arno and Roberta E. Wagner Scholarship Fund
Ann Laura Waggett
Webster Square Business Association
Margaret G. Wolcott Trust
Worcester Educational Development Foundation
Worcester Sports Foundation
Gifts to **DESIGNATED FUNDS**
Anonymous (1)
Ronald C. and Kay S. Baird
Joan Barry
Edward W. Bettke
Bowditch & Dewey, LLP
Janet Carrick Residuary Trust
William R. and Janet A. Carrick Charitable Remainder Unitrust
Deanna and Richard Charves
Tucker M. Clark
Elizabeth A. Clifford
GHM Industries, Inc.
Hanley LLC Fund at Vanguard Charitable Endowment Program
John D. Hunt
Robert M. and Carolyn G. Hyde
Loomis, Sayles & Company, L.P.
Elizabeth C. Newell Trust
John D. O’Connell
Shirley A. Solomon
Cynthia M. and Edward J. Stark Jr.
Jean and Susan Therriault
Worcester Historical Museum
WTAG Listeners
Yesod Foundation
Gifts to **AGENCY FUNDS**
Abby’s House
ArtsWorcester
Dismas House of Massachusetts
Estate of Patricia A. Fletcher
Friends of Beaman Endowment Committee
Friends of Northbridge Elders
Friends of the Gladys E. Kelly Public Library
Friends of the Northborough Library
Friends of the Upton Town Library
Heart of New England Council, BSA
India Society of Worcester
Joy of Music Program, Inc.
William G. Muller
Music Worcester
Quinsigamond Community College Foundation
St. Mary’s Assumption Albanian Orthodox Church
Straight Ahead Ministries
Wachusett Greenways
West Boylston Elder Services
Worcester Center for the Performing Arts
Worcester Chamber Music Society
Worcester County Poetry Association
Worcester Historical Museum
Worcester Jewish Community Center
Edward P. Yaglou
Gifts to DIRECTORS & CORPORATORS FUND

Unrestricted donations provide the Foundation the flexibility to respond to both urgent and strategic needs, and help create a community that provides opportunities for all. We thank all who gave in 2018.

Anonymous (2)
AAFCPAs Charitable Foundation
Larry and Gloria Abramoff
Jim and Colleen Abrams
Kola Akindele
David Angel
Roy C. Angel
Michael P. Angelini
Abdulali F. and Amina Ansari
Atlas Distributing, Inc.
Joycelyn Augustus
Robert and Beverly Bachelder
Linda Barnes
Alex and Kelly Bartholomew
Thomas and Lynora Bartholomew
John and Kay Bassett
Paul Belsito
Sarah Berry
Norman Bitsoli
Elissa Boisvert
Maurice and Pamela Boisvert
George F. Booth II
Mark A. Borenstein
Anne M. and Robert A. Bourgeois
James Broadhurst
Michael D. Brockelman
Tony and Denise Brookhouse
John H. Budd
James R. Buonomo
Wanda L. Cantlin
Jennifer D. Carey
Kirk and Price Carter
Deb and Charlie Cary
Mattie Castiel
Linda Cavaioni and John Medbury
Francesco C. Cesareo
State Senator Harriette L. Chandler
Brian and Maureen Chandley
Joy C. Child
Jeff and Beth Chin
Rabbi Valerie and Jonathan Cohen
J. Christopher and Catherine Z. Collins
James E. Collins
Thomas J. Corrigan
Robert J. Cousy
Tracy A. Craig
Benjamin Craver
Michael Crawford
Frederick G. Crocker Jr.
Jill C. Dagilis
Geoffrey Dancey and Rashida Garcia-Dancey
Pamela A. David-Braverman and Henry Braverman
Dix and Sarah Davis
Laurie and Phil Davis
Eileen Riggs deCastro
Martha L. Densmore
Henry B. Dewey
Morgan B. Dewey
Digital Federal Credit Union
Donate Well General Fund
Jim and Carol Donnelly
Donald F. Doyle
Karen E. Duffy
Ellen S. Dunlap and Frank Armstrong
Sandy Dunn
Susan West Engelkemeyer
J. Irving England and Jane L. England Charitable Trust
Estate Preservation Law Office
Barbara E. Fargo
Saul F. Feingold
Fidelity Bank
Allen W. Fletcher
Justin L. Fletcher
Warner S. and Mary F. Fletcher
Jack and Robin Foley
Francis A. Ford and Shirley A. Doyle
Forkey Family
David P. Forsberg
Mark and Jan Fuller
Patricia and Gerald Gates
Lee and Dina Gaudette
Eve Gilmore
Martha P. Grace
John E. Graham
Cynthia and Timothy Gray
Ivan and Noreen Green
Marty Green
David R. Grenon
J. Michael Grenon
Dr. Abraham W. Haddad
Gloria D. Hall
Betsy and David Harris
Harvard Pilgrim Health Care Foundation
Ernest S. Hayeck
Maria Heskes-Allard
Honee Hess and Phil Magnusson
Emily and James Holdstein
Kathryn and James Hunter
Donald Inglis
M Howard Jacobson
Mr. and Mrs. Timothy M. Jarry
Patricia L. Jones
Steve and Lee Joseph
Kevin R. Kearney and Mary Mullaney
Alison C. Kenary
Richard W. Lavey
James B. Leary
Diane L. LeClair
Patsy C. Lewis
Joseph Lian Jr.
Robert G. Lian
Ann T. Lisi and Joel P. Greene
Linda Carre Looft
Monica Escobar Lowell
Susan M. Mailman and James R. Chapdelaine
Donald and Mary Maloney
Donald O. Maloney Jr.
Patrick and Kristine Maloney
Jonathan L. Mannina
Senator Edward J. Markey
Mr. and Mrs. Christopher McCarthy
C. Jean McDonough
Tim and Nadia McGourthy
Bob and Penny McLaren
Jean G. McMurray
Christopher and Jayne Mehne
Peter Metz MD
Katherine H. and John K. Metzger
Mr. and Mrs. Erwin H. Miller
Mirick Charitable Fund of T. Rowe Price Program for Charitable Giving
John O. Mirick
Satya Mitra
Ann Molloy and Ken Stillman
Charles F. Monahan Jr.
Gail Morgan and Bernie Lempicki
Jessica and Jim Morris
Frederic and Victoria Mulligan
Ginger Navickas
David A. Nicholson
David R. Ojerholm CPA
Christopher M. O’Keefe and Holly G. Baab
Wendy F. and Dennis M. O’Leary
Ruth Osterman
Sahdev and Carolyn Passey
Deborah A. Penta
Neil F. Petersen Jr.
Paul M. Pezzella
Stephen and Cynthia Pitcher
Jason Port
Christine M. Proffitt
Marla Maykel Plye
Hilda Ramirez
Mary Lou Retelle
Mary C. Ritter
Shelley and Todd Rodman
Laurie Ross
Scott and Lois Rossiter
Paul Rossley
Ruth R. Rubin
Kent du Russell and Aisling Gaughan MD
Frank and Wendy Saba
Kimberly M. Salmon
Jamie and Abby Salois
Paul F. Schlaikjer
Paul F. Scully
Carol L. Seager
Rashid M. and Humaira Shaikh
Jay S. Sherwin
Philip O. Shwachman
Drs. Ahmad D. Siddiqui and Zahra Sheikh
Edward D. Simsarian
Michael and Carol Sleeper
Jeffrey Solomon
Jaime Soto Jr.
Peter R. Stanton
Carolyn and Howard Stempler
Kelly A. Stimson
Alan M. Stoll
George and Sheila Tetler
Troy B. Thompson
David N. Tinsley
Tuyet Tran
Elizabeth Tripp
Kathryn Tsandikos
Randell L. Tucker
UBS Employee Giving Program
Michael and Andrina Urban
Wayne M. Ushman
Hasan and G. Naheed Usmani
James Vitiello
Wyatt R. Wade
William D. Wallace
Matthew Wally
Victoria and James Waterman
Charles S. Weiss
James A. Welu
Meridith D. Wesby
Mark and Barb Wetzel
Harry T. and Lucy Whitin
Richard H. and Phyllis A. Whitten
Thomas J. Wickstrom
David K. and Sue Woodbury
Yesod Foundation, Inc.
Janice B. Yost Ed. D.
Kelsa L. Zereski
Valerie Zolezzi-Wyndham and Kevin Wyndham

IN MEMORIUM
The Foundation family lost several treasured friends during 2018, including…

Herbert B. Cohan
Richard W. Dearborn
Edwin J. Fedeli Sr.
Patricia A. Fletcher
Lillian R. Goodman
Nils Granfors
David N. Grenier
Richard H. Harris
Nason A. Hurowitz
Cynthia Ragg Lane
David G. Massad
Beverly A. Pinjuv
F. Mike Pinjuv
Helen Queenan
James F. Queenan
Arthur J. Remillard Jr.
Ida Rotman
Richard Simonian
Dorothy C. Tinsley
Margaret Wolcott
FINANCIAL STEWARDSHIP

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

The 2018 Investment Committee Members were: Timothy M. Jarry, Chair; Thomas J. Bartholomew; J. Christopher Collins; James E. Collins; Dix F. Davis; Ellen M. Ferrante; Warner S. Fletcher; Abraham W. Haddad; and Jeffrey S. Solomon. The Committee is supported by independent investment consultants Prime Buchholz LLC, which provides technical assistance, manager selection, and ongoing evaluation.

Net Investment Returns (through 12/31/18)

<table>
<thead>
<tr>
<th>Portfolio (at 12/31/18)</th>
<th>1 Yr.</th>
<th>3 Yr.</th>
<th>5 Yr.</th>
<th>10 Yr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>GWCF Long-Term Pool</td>
<td>-6</td>
<td>4.5</td>
<td>3</td>
<td>7.2</td>
</tr>
<tr>
<td>GWCF Policy Benchmark</td>
<td>-5.6</td>
<td>4</td>
<td>2.8</td>
<td>6.4</td>
</tr>
<tr>
<td>Global Equity</td>
<td>10%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Domestic Equity</td>
<td>18.3%</td>
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<tr>
<td>International Equity</td>
<td>18%</td>
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<tr>
<td>Flexible Capital</td>
<td>31%</td>
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<tr>
<td>Fixed Income</td>
<td>17.1%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Real Assets</td>
<td>4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>1.6%</td>
<td></td>
<td></td>
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</tr>
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</table>

SUMMARY FINANCIAL STATEMENTS (as of 12/31/2018)

<table>
<thead>
<tr>
<th>Assets</th>
<th>2018</th>
<th>2017</th>
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<tbody>
<tr>
<td>Investments</td>
<td>$145,366,137</td>
<td>$155,090,422</td>
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<tr>
<td>Cash &amp; Equivalents</td>
<td>$1,064,202</td>
<td>$1,284,062</td>
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<tr>
<td>Pledges Receivable</td>
<td>$0</td>
<td>$435,000</td>
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<tr>
<td>Other Assets</td>
<td>$175,435</td>
<td>$205,921</td>
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<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$146,605,774</strong></td>
<td><strong>$157,015,405</strong></td>
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<table>
<thead>
<tr>
<th>Liabilities &amp; Net Assets</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants Payable, Accounts Payable &amp; Other Liabilities</td>
<td>$523,348</td>
<td>$411,173</td>
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<tr>
<td>Life Income Gift Liabilities</td>
<td>$938,500</td>
<td>$991,931</td>
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<tr>
<td>Funds Held for Agency Endowments</td>
<td>$24,396,276</td>
<td>$22,126,274</td>
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<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$25,858,124</strong></td>
<td><strong>$23,529,378</strong></td>
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<tr>
<td>Net Assets with Donor Restrictions</td>
<td>$119,611,477</td>
<td>$132,127,592</td>
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<tr>
<td>Net Assets without Donor Restrictions</td>
<td>$1,136,173</td>
<td>$1,358,435</td>
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<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>$120,747,650</strong></td>
<td><strong>$133,486,027</strong></td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES &amp; NET ASSETS</strong></td>
<td><strong>$146,605,774</strong></td>
<td><strong>$157,015,405</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Revenues</th>
<th>2018</th>
<th>2017</th>
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<tbody>
<tr>
<td>Contributions</td>
<td>$7,765,675</td>
<td>$5,893,535</td>
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<tr>
<td>Net Investment Returns</td>
<td>$(9,614,134)</td>
<td>$20,529,721</td>
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<tr>
<td>Other</td>
<td>$(11,863)</td>
<td>$137,399</td>
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<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>$(1,860,322)</strong></td>
<td><strong>$26,560,655</strong></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>2018</th>
<th>2017</th>
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</thead>
<tbody>
<tr>
<td>Grants Approved</td>
<td>$6,652,756</td>
<td>$8,400,355</td>
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<tr>
<td>Operating Expenses</td>
<td>$1,831,054</td>
<td>$1,658,819</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$8,483,810</strong></td>
<td><strong>$10,059,174</strong></td>
</tr>
</tbody>
</table>

The audit of the Foundation’s financial statements for the years ending December 31, 2018 and 2017 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.
BOARD OF DIRECTORS
GROWING THE GOOD A Campaign for Greater Worcester

“The Foundation exists to understand and address our community’s pressing problems and opportunities. Few of us on our own have the time or means to do this. Through their funds, donors create scale that can achieve significant impact where it matters most. Together, we expand the good we can do for Greater Worcester.”

Gerald M. Gates
Chair, Board of Directors

Put your compassion and imagination to work growing the good in your community. As you consider the Foundation as a partner to increase the power of your local philanthropy, we invite you to share in our vision for Greater Worcester: It’s a place where all children gain a strong start during their first years; where quality, comprehensive health care is available to all; where all young people can gain opportunities to succeed in school and in life; where economic and housing security are within everyone’s reach; and where civic, cultural and natural resources enrich our lives.

- Empower the Foundation to meet pressing community needs and invest in promising solutions with your discretionary or field-of-interest fund
- Support a cherished cause or nonprofit with a donor advised or designated fund
- Honor a loved one or group in perpetuity with a named scholarship fund
- Designate the Foundation as beneficiary of your planned gift

To find out more, contact Kelly Stimson, at 508-755-0980 or email donorservices@greaterworcester.org.
STAFF

Ann T. Lisi
President & CEO

Diane S. Allain
Operations Manager

Jonathan Cohen
Program Officer

Liz Nye
Donor Services Officer

Christopher M. O’Keeffe
Vice President for Program

Mark Onanian
Staff Accountant

Lindiana Semidei
Donor Services Associate

Sarah Shugrue
Program Officer

Kelly A. Stimson
Vice President of Donor Services

Jasmine Vasquez-Okutoro
Program Associate

Jacqueline L. Williams
Administrative Assistant

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

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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.

Greater Worcester Community Foundation
• 370 Main Street, Suite 650 • Worcester, MA 01608 • 508.755.0980
www.greaterworcester.org