community

2020 annual report
Dear Friends,

2020 is a difficult year to capture in words. As we look back on the year, however, there is one word and feeling that arises over and over again: community. Like many of you, we spent 2020 engulfed by the current tragic events—from the loss of nearly two million lives world-wide due to the COVID-19 pandemic, economic turmoil, racial and social justice issues, a presidential election turned violent, and everything in between, 2020 was a year like no other. Yet, amid the anxiety and uncertainty we all felt, the MetroWest community displayed extreme compassion, generosity, and importantly, resilience.

When we think about the significance of having a strong community foundation in the region, there is no better time to reflect on the importance of the Foundation for MetroWest and the work we do. At the beginning of the 2020, we were planning a year long celebration of our 25th anniversary and had no idea that this milestone year would be so pivotal for our work. Not only did we put all celebrations on hold, but we also quickly and efficiently mobilized resources to be there for our most vulnerable neighbors during an unprecedented time of need. In 2020 the Foundation granted over $4 million in emergency relief funding to our nonprofit partners serving the region. While most of our efforts were geared toward emergency relief, we were fortunate to be able to provide funding to local nonprofits through our Arts & Culture Grant Program, Youth Development Grant Program, and non-covid-related town fund grants. This brought our total impact from giving to nearly $5 million in 2020, which is almost triple the grantmaking we have done in a normal annual cycle.

What matters most, however, is not the number we were able to give, but the impact of the Foundation’s work in the community. We hope this year’s annual report will show you just how critical a strong community, bolstered by a strong community foundation, is during the good times and the tough ones. There is power in unity.

We are a region comprised of many different cities and towns, but the love we share for our neighbors is what bonds us together. We are proud of the way the Foundation was able to respond to the urgent and everchanging needs of our region in 2020, and we’re humbled to share that with you through the annual report. In the following pages, you will learn how our donors, nonprofit and corporate partners, state and local governments and the community foundation that serves you, came together, despite being apart, to be a resource and support system for our communities.

As we continue to evolve to meet the needs of our region, we invite you to join us on this journey of making MetroWest a place that all neighbors are proud to call home. On behalf of the board and staff at the Foundation, we thank you for trusting us to be a partner and resource.

Sincerely,

Jay Kim
Executive Director

Louis P. Crosier
Board Of Trustees, Chair

As of January 1, 2021, our beloved executive director of 16 years, Judith G. Salerno, stepped down from her position. She is now the Executive Director Emeritus and will continue her involvement with the Foundation.
Confronting the challenges in our region begins with understanding the needs of our community. To celebrate our 25th anniversary, we launched Impact MetroWest, an interactive website that includes over 50 indicators and provides insight into the trends shaping our community over the last decade. The data serves as a report card for the region, but also acts as a spark to drive change.

What we’ve learned:

In 2014-18, 8% of MetroWest residents were living in poverty, up from 7% in 2000. Of the three regional counties, Worcester had the highest rate, at 10%, followed by Middlesex at 8% and Norfolk at 6%. Waltham had the highest rate, at 11%, with nearly 6,100 residents below the poverty line. The City of Framingham was second highest, at 10%, nearly 6,700 residents.

In 2014-18, 23% of MetroWest residents spoke a language other than English at home, up from 18% in 2000. Framingham, at 40%, has the most language diversity, followed by Waltham and Marlborough, at 34% and 33%. The three localities’ rates increased by 11, 7, and 14 points, respectively, since 2000.

As of 2013, about 384,000 acres - or 21% of all land in MetroWest - was deemed "protected." This was a slightly smaller percentage than Massachusetts as a whole (25%).

In 2019, 54% of 8th graders were considered proficient in MetroWest, a slight drop from 2018. This was higher than the 2019 statewide rate of 46%. Students in MetroWest from economically disadvantaged backgrounds had a proficiency rate of 26% in 2019, compared to 63% of those who were not economically disadvantaged.

At the beginning of 2021, the Foundation updated Impact MetroWest to include data specific to racial and social indicators. Visit impactmw.org for more information.
OVER $4 MILLION

In 2020, the Foundation responded to the pandemic by being there for its neighbors during a critical time of need. We were able to quickly mobilize resources to get over $4 million in relief in the hands of our nonprofit partners that worked with some of MetroWest's most vulnerable neighbors.

Impact areas included: food and basic hygiene assistance, housing support, mental health, basic emergency needs, PPE, remote learning support, and other programs to help the community during this time.

Funds
- MetroWest Emergency Relief Fund
- Feed Framingham Covid-19 Fund
- Town Fund Emergency Relief Efforts
- Massachusetts Covid-19 Relief Fund Partnership
- 25th Anniversary Grant Program
- Donor Advised Funds
Because of the Foundation’s financial support, we were able to partner with Framingham Public Schools, Wayland Congregational church and Stop and Shop to support 70 families with fresh grocery bags every other Saturday. This program has been operating for eight months, allowing our church to meet the needs of the community through a population we would not otherwise have contact with. With the generosity of other community groups, we were able to make a significant impact for Framingham families. The clients and families we served were able to have assistance during Covid and we were able to address the food desert that exists, and work to close the gap of hunger insecurity.

- Rev Dr J Anthony Lloyd, Pastor
Greater Framingham Community Church

A single father of three girls was in the District Court for a non-payment Summary Process action brought upon by the landlord in January 2021. During the intake, he broke down in tears and stated that his soon-to-be ex-spouse was abusing alcohol and drugs that he had to quit his job to be home around his children. And then COVID started, and children all stayed home for school such that he couldn’t do much driving-related jobs. His arrears were at over $17,000 in January 2021.

As of April 2021, this tenant and his children have moved into a new 3-bedroom apartment. With the childcare situation improved for this father, he is actively looking for new jobs through a recruiting agency. All these concerted efforts made it possible for him to have a fresh start and stable housing going forward. It took a three-month effort for this process to work out. Additionally, this tenant had made it clear that he would not want to have an eviction record to impede his future rental prospects. With the solution that parties and mediators have worked out, the prior landlord is willing to dismiss the case against this tenant.

-Seth Izen, Executive Director
MetroWest Mediation Services
(details altered to protect confidentiality)

In the fall of 2020, the Framingham Board of Health, through case investigation and contact tracing efforts, noted an increasing number of residents who tested positive with COVID-19 but who struggled to isolate due to financial constraints. In response, South Middlesex Opportunity Council (SMOC) created the COVID-19 Emergency Assistance Fund in partnership with the Framingham Board of Health and local funders, including Foundation for MetroWest. This program is targeted at low income households, some of whom are undocumented, who work hourly jobs where they do not get paid if they do not work.

Since the Fund launched in November 2020, it has provided emergency financial assistance to 83 heads of households in Framingham, representing over 208 family members. Because this financial assistance has enabled these households to quarantine safely without extreme financial repercussions, this has also prevented over 350 coworkers from experiencing unsafe workplace interactions.

-Esther Powell, Director of Resource Development
South Middlesex Opportunity Council
Thank you to MathWorks for being our partner in philanthropy and helping us celebrate our 25th anniversary in the most fitting way possible: being there for our neighbors during a critical time of need.
In 2020, the Foundation turned 25. Originally, we partnered with MathWorks to bring a one-time special video grant program to our local nonprofits. Because of the pandemic, however, MathWorks supported us in pivoting that program by providing each applicant with a $5,000 anniversary grant to offset the challenges caused by the ongoing effects of COVID-19.

25th Anniversary

Arts & Culture
- Cultural Alliance of Medfield
- G6Cordova Sculpture Park and Museum
- Discovery Museum
- Framingham Downtown Renaissance
- Natick Center Associates, Inc.
- Reagle Music Theatre of Greater Boston, Inc.
- The Center for Arts in Natick (TCAN)
- The Wayside Inn Foundation

Food Insecurity
- A Place to Turn
- Boston Area Gleaners
- Daniel’s Table
- Gaining Ground
- Land’s Sake
- Lovin’ Spoonfuls Inc
- Needham Community Farm, Inc

MathWorks Visionary Grant for STEM Education
- Big Brothers Big Sisters of Central Mass/MetroWest, Inc.
- Boys & Girls Clubs of MetroWest
- Milford Youth Center
- The Marlborough STEM Council
- The EcoTarium

Environment
- Charles River Watershed Association
- Commonwealth Green Low-Income Housing Coalition
- Gore Place Society

Youth Development
- Boys for the Better
- Community Investors
- Dignity Matters Inc.
- Doc Wayne Youth Services, Inc.
- HeartPlay CareGroup Parmenter Home Care & Hospice, Inc.
- Hoops and Homework
- Hope & Comfort
- Jeff’s Place Children’s Bereavement Center
- Jewish Family Service of MW
- Mazie Mentoring Program
- Mass Audubon
- Massachusetts Bay Community College
- MetroWest Legal Services
- Minding Your Mind
- Rise Above Foundation
- The Salvation Army
- The Umbrella Community Arts Center
- Waltham Partnership for Youth
- Wayside Youth & Family Support Network

Family Support
- Advocates, Inc.
- Asperger/Autism Network, Inc.
- Bethany Hill Place
- Employment Options, Inc.
- Family ACCESS of Newton
- Fresh Start Furniture Bank
- Friends of 2Life Communities
- Friends of the Waltham Family School, Inc.
- Jewish Family & Children’s Service
- Massachusetts Down Syndrome Congress
- Mental Health Collaborative
- RIA House, Inc. – Ready.Inspire.Act
- The Arc of Massachusetts
- Waypoint Adventure
- YMCA of Greater Boston/Waltham Branch

We received a testimonial from one of our clients about what online ordering at our food pantry has meant to her family. She explained that she now has no food waste, and that she can specify what it is that she needs. With now being the second-grade teacher for her son (English is also her second language) not having to wait in a line for groceries and being confident that she will have the foods that she needs to feed her family is a huge improvement. Her ability to place an order online and make an appointment at Open Table was made possible through our Foundation for MetroWest Winterization grant.

- Jeanine Calabria, Executive Director, Open Table

We salute our nonprofit partners for the work they were able to do for MetroWest in 2020. There is no community without unity, and 2020 showed us all the power of coming together for our most vulnerable neighbors.

**The nonprofits listed were recipients of our 25th Anniversary Grant. For a full list of nonprofit partners who were awarded emergency relief grants, visit our website at foundationmw.org.**
The Foundation for MetroWest acknowledges and thanks the many individuals and corporations that support our work with generous financial contributions that allow us to serve as a philanthropic resource to the MetroWest community.

**2020 Supporters of the Foundation**

**Funds and Events that Directly Support the Work of the Foundation:**
- 2025 Endowment Fund
- Annual Fund
- Business Leadership Fund
- Community Leadership Breakfast
- Center for Philanthropy Education Endowment Fund
- Feed Framingham Fund
- MetroWest Emergency Relief Fund
- MetroWest Fund for Arts & Culture
- MetroWest Fund for Environment
- MetroWest Fund for Families
- MetroWest Fund for Youth Development
- MetroWest Hunger Relief Fund
- Spring Inspiration Breakfast
- Youth in Philanthropy Endowment Fund

**Leadership Circle**
($50,000-$99,999)
- Roland Hoch and Sarah Garland-Hoch
- Leslie and Collin Masson
- Jack and Carol O'Neil

**Builder**
($25,000-$49,999)
- Robert Brack
- Cecily and Blaz Cassum
- The English Family Fund
- Emerson Hospital
- Gemmell Family Fund
- Anne Grape
- Ann and Peter McAvlin
- Amy and Matt Siegel
- Trisha Tippin
- Nancy and Murphy Vandervelde
- Wellesley Bank Charitable Foundation

**Patron**
($10,000-$24,999)
- Anonymous (3)
- Herbert and Esther Atkinson Fund
- Bowditch & Dewey Fund of Greater Worcester Community Foundation
- Jeffrey and Pam Diapel Choney
- Beth and Todd Cook
- Helen and Minor Cary Fund
- Louis and Hope Crissler
- Susan and David Elliott
- Loren and Jeff Feingold
- Andrew and Elizabeth Gallinato
- Garry and Elaine Holmes
- Hopkinton Country Club Charitable Foundation
- Susan and Brian Kuoogian
- Lawrence Family Fund
- Pamela and Steve Lesser
- Michael and Peggy McLellie
- Sheila Gunn McCormick
- Janet and John Pollitte
- Maryann and Donald Petry
- Steve Shelnopk
- The Sudbury Foundation
- The T.I.K. Foundation, Inc.
- Tower Fund
- Jessica and Peter Walter
- Yare Appliance Fund

**Founder**
($5,000-$9,999)
- Anonymous (3)
- Kenneth and Susan Abrams
- Alice W. Dorn Fund
- ArtLight Capital Partners
- Avicia Bank
- Ballentine Partners, LLC
- Kathleen Brennan and Gerald circumstance
- Bowerbitch & Dewey, LLP
- Canby Financial Advisors
- Robert Carson

**Friend**
($1,000-$4,999)
- Anonymous (3)
- Brown Advisory
- Leslie and Howard Appleby
- Katherine Baloun
- Brookline Bank
- Maria Barry
- Kathleen and David Baum
- Berkshire Bank
- Maria and Adam Chase
- John and Jennifer DeSista
- Digital Federal Credit Union
- Caitlin Donovan
- Donna Hake and John Donovan
- Federal Home Loan Bank of Boston
- Thomas Andrews and Christine Gillman
- Andrea and Russ Guillot Charitable Fund
- James Hanahan and Scout Austin
- John and Georgieta Keveren
- Jen and Barnett Helberg
- Kim and Elliot Herman
- Susan Hurwitz and Miguel Lessing
- John and Naomi Tomeside Foundation
- Christine and Will Kendall
- David and Suzanne Lissy
- MetroWest Health Foundation
- Christine and Michael Miller
- Menpesweag Foundation
- Morgan Stanley
- The N&D Group
- National Development Associates of New England, LP
- Neecham Bank
- Oasis Systems
- The Paula's Gift Fund
- Patricia and James Petras
- Margaret Ramsey and John McCluskey
- Hannamore and Roger Reiser
- Kyle and Amy Schaffer
- Andrea Sussman and Andrew Troop
- SVN (Panos Commercial Group, Inc.
- David and Jennifer Swartz
- Martha Iota
- Wayne L. Griffin Electric, Inc.
- The Yale Charitable Foundation
- Jennifer and Evan Tobasky

**Funds**
($1,000-$4,999)
- Anonymous (3)
- Brown Advisory
- Leslie and Howard Appleby
- Katherine Baloun
- Brookline Bank
- Maria Barry
- Kathleen and David Baum
- Berkshire Bank
- Holly Bonoem
- Stephanie Buller
- State Street Matching Gift Program & Global Giving Campaign
- Stephen Capelston
- Andrew and Christine Capellino
- Jackie and Arthur Chistiana
- Ann and George Colacum
- Miriam Lester and Robert Cooper
- Daniel B. Lester Fund
- Sheila and Richard Davison
- Susan DeRoche
- Bryan and Cynthia Deysier
- Sandra and Garth Dickie
- Eric Enge & Beth Dill
- J. Anthony Dewsn
- Corrie and Tom Dieter
- Eaton Vance Investment Counsel
- Susan and Timothy Estella
- Andrew Falender and Jacqueline Lenth
- Fiduciary Trust Company
- Heather Flugard
- John Foreman
- Framingham Youth Basketball
- Friends of Resiliency for Life
- Andrew Ross and Leslie George Fund
- Hart Family Fund
- James Jay Lavelle Memorial Fund
- Carol and Stephen Geremia
- Laurie and Richard Gilkic
- Christopher and Amy Gullot
- Ying Han
- Harvard Pilgrim Health Care
- Marijane Herity
- Brian and Robin Hicks
- Jane and Steven Hoch
- Dirk Horseman
- Roger Holmes
- Shirley Hui and Robert Allen
- Ipswich Bay Glass Co., Inc.
- Martha Jueich
- Allen Kamek
- Katherine Kaufman
- Kang Un Kim
- Megan and Kenneth Knox
- Adam Koppel and Brenda Haynes
- Laurie Kigman and Nate Wenselh
- Robert L'Esperance
- Marisue Lagarde
- Legacy Real Estate Ventures, LLC
- Robert Leonard
- Jennifer and Tom Levering
- David and Patty Levy
- Carolyn and Andy Limeri
- Laurel and Stephen Lyle
- Maureen Maas
- George Mallet
- Diane Margolis
- Gary Marini
- Wegmans Food Markets INC.
- Leslie and Kevin McCafferty
- Patricia and Edward McNulty
- David and Dawn Mendelshein
- Metropolitan Cabinets and Countertops
- Janice Miller
- Fiona and Daniel Moore
- Janna Mulhaisen
- Alison and Ryan Murphy
- First Congregational Church of Natick
- Northland Residential Corporation
- Laura and Matt Olton
- David O’Neil
- Patllia Magpie Fund
- Wendy and Jim Paul
- Lynn Petersau
- Barbara Pike
- The Pekay Family Fund
- Paul Reed
- Kenneth and Shirley Rendell
- Elizabeth and Greg Robbins
- Rockland Trust Charitable Foundation
- Erin Rodat-Savila and Ashesh Savia
- Susan Littlefield and Martin Rooper
- Michael Rosen
- Dedham Institution for Savings
- Sara and Michael Schnitzer
- Christine and Doug Schuster
- Rhoda and John Schwarz
- Jacqueline and Peter Segall
- Helene Handelsman Simon
- Dave and Peter Sinesi
- Erik Sirri
- Libby and Tom Skiba
- Debbie and Robert Spalding
- Jill and Michael Starnsky
- Helly and John Steger
- Stenepage Group

Waypoint Adventures

Waypoint didn’t slow down in 2020. The outdoors were still open! Financial support from the Foundation enabled Waypoint to grant much-needed scholarships and adapt our program model and begin offering private courses and small group adventures. We incorporated social distancing rules and were able to provide in person support to people with disabilities - enabling them to participate in hiking, kayaking, rock climbing, snowshoeing and cross-country skiing during the pandemic.

-Dan Minnich, Executive Director, Waypoint Adventures
“The Foundation for MetroWest is a very welcoming organization and I feel like a part of their family. They provide me with a network of like-minded individuals who are very motivated to support our community for years to come.”

Community Advocate, Sue DeRoche

Through her fund, ‘A Path Ahead Community Fund,’ inspired by the PBS documentary, A Path Appears, Sue has partnered with the Foundation to create a lasting impact within the MetroWest community.

The work of the Foundation is made possible by the generous support of our donors, and we are incredibly grateful that our donors trust us to address the critical needs in the MetroWest community. While there are many ways to give to the Foundation, one special way that contributes to the longevity of the Foundation and our impact in the community is through our Donor Advised Fund (DAF) options.

This special giving vehicle is like a philanthropic bank account, established for the sole purpose of supporting charitable organizations. By opening a DAF with the Foundation for MetroWest, you not only have the potential to grow your charitable dollars through our investment strategy, you also receive 1-1 guidance and support from our team of local philanthropic experts.

Below is an interview with Sue highlighting her philanthropic mission, why she chose to work with the Foundation for MetroWest, and why a donor advised fund was the right choice for her charitable contributions.

What inspired you to get involved with philanthropy and become strategic about your giving?
I was blessed with parents that instilled in me a desire to help others and to be aware of the needs in my community. Throughout my life, while I made small donations and volunteered my time to various causes, I hoped at some point to be able to make bigger contributions. In 2015, I felt a strong need to pull away from the corporate world and spend more time in the nonprofit sector. I recall being mesmerized watching the PBS documentary, A Path Appears, and its stories of hope arising out of hopelessness. It inspired me to think of philanthropy as an investment in transforming lives and creating opportunities. My own path became clearer as I pondered who would support local grassroots efforts to help our neighbors rise above poverty if not the members of their own communities. I wanted to be part of that effort in my own backyard.

Why did you decide to open a donor advised fund with the Foundation for MetroWest?
While I explored forming a small foundation, I found that a Donor Advised Fund would provide the same opportunity for making those investments in my community. Using a DAF would allow me to focus on identifying needs and grant making, leaving the management of my assets to the organization sponsoring my DAF. I researched various sponsors of DAFs but found the Foundation for MetroWest was truly unique and would offer me so much more than asset management and back-office support. The Foundation’s approach with the DAFs they sponsor is to create a partnership in philanthropy.

What aspects of the work do you enjoy most?
It is so gratifying to see a project fully funded so that it can proceed without delay. There have been several projects where the amount needed to support the project exceeded what I could offer. In one project with Bethany Hill Place, involving important upgrades to Bethany Hill’s elevator, I learned that the Foundation for MetroWest was looking to support a portion of that project. We discussed pursuing joint funding so that the work could begin expeditiously. I love the collaboration between local directors and funders in working to find solutions for our most vulnerable neighbors.
What added benefits do you receive from partnering with the Foundation that you really enjoy?
The Foundation for MetroWest is a very welcoming organization and I feel like a part of their family. They provide me with a network of like-minded individuals who are very motivated to support our community for years to come. It has been extremely helpful to brainstorm with the Program Director, Caroline Murphy, about the needs of a specific nonprofit or the state of community needs overall. These discussions allow me to learn about new nonprofits in MetroWest and for me to reciprocate by sharing my knowledge with them. The Foundation for MetroWest has provided several learning opportunities to enhance my due diligence skills and tools to research the fundamentals and financial status of a particular nonprofit. Doing this groundwork in advance of an in-person meeting allows the conversations with the directors and staff to focus more closely on their challenges, needs and strategic plans and ultimately, how I can help.

Tell us an inspiring story that created action for you in your grantmaking.
My very first grant was a result of a site visit to a foster home. While touring the home, I was troubled while walking down a public hallway to see a teenage boy acting out and being put in gentle restraint to help him calm down. Children in foster homes suffer from anxiety that can only be felt by a child who has been taken away from their family setting and put into a facility with a future unknown. Although a solution to this issue was on their wish list, there was a lack of funding. Working with the staff, we developed a Sensory Room where a child could decompress and be supported in a one-on-one setting with a social worker out of public view. With my grant, we equipped the room with books, music, weighted blankets, fidget gadgets, and traditional sensory tools, as well as alternative calming tools to address anxiety, such as Yoga Nidra. Once completed, I went back to visit and was greeted with hugs from the staff and children who were so appreciative to know someone understood and cared about them.

What does the future of A Path Ahead Community Fund look like?
I intend for A Path Ahead Community Fund to be a lifelong endeavor. In my heart, I feel everyone should have their basic needs met. They should have food, clothing, access to job opportunities, and other resources that allow them to lead independent lives. People should have a vision of what their future looks like. They should have hope. After five years, I seem to have found a rhythm of searching out nonprofits that I feel are making a significant impact, have strategic plans, and have strong leadership. I have come to view the nonprofits I work with as partners and my grants as investments in solutions. Because community needs are fluid, I want to remain open to new opportunities.

A Path Ahead Community Fund is a key part of my life and has been included in my estate plan so that I can ensure the fund’s assets will continue to be invested to help the MetroWest community consistent with my core mission.

Any other stories of hope and inspiration you would like to add?
It is so clear that the Foundation for MetroWest is here for the long term. For example, the Foundation for MetroWest provides training opportunities for high school students in MetroWest through their Youth in Philanthropy program. These students are learning so many skills. This opportunity is truly planting seeds for the future of our community by helping the next generation of philanthropists become equipped to serve their communities.

The Foundation for MetroWest is grateful for Sue DeRoche’s continued partnership. To learn more about the Foundation's Donor Advised Fund options, visit our website at foundationmw.org/give/starting-a-fund

“I researched various sponsors of DAFs but found the Foundation for MetroWest was truly unique and would offer me so much more than asset management and back-office support.”
Funds of the Foundation

Unrestricted Funds
Trustees and Advisers Fund
20/25 Endowment

Affiliate Funds
Support a variety of agencies and programs within a specific community
Community Endowment of Lexington
Community Fund for Wellesley
Community Fund for Wellesley Covid 19 Relief Fund
Community Fund for Wellesley - Al Robinson Fund for the Arts
Medfield Foundation Legacy Fund
Southborough Community Fund
The Sherborn Endowment Fund

Designated Funds
Support specific agencies and programs
Ashland Town Emergency Fund
Bea and Woolsey Canover Fund
Canover Sustainability Fund
Carmel Canman West Fund
Cummings MetroWest ESI Fund
First Parish Church in Wayland Fund
FaxOpera Music Association Fund
Gannon Fund for Youth Development
Meynard Education Foundation Fund
MetroWest ESI Fund
New Era Fund
OUT MetroWestInc. Fund
Weston Arts & Innovation Center Fund

Donor Advised Funds
Provide grants based on regular advice by the donors
Albert Cohen Charitable Fund
A Path Ahead Community Fund
Adam Gouzie Green Memorial Fund
Andrew Rose and Leslie George Fund
Anna E. Lesser Fund
Anna E. Borgesani Community Fund
Anton-Charman-Bass Fund
Ben Kessel Memorial Fund
Brack Family Fund
Brennan and Clancio Family Fund
Business Leadership Fund
Caris Fund
Cohen-Gertz Family Fund
Crozier Family Fund
Crotty Family Fund
Daniel B. Lesser Fund
Deland, Gibson Fund
Dover Church Youth Fund
English Family Fund
Garry & Elaine Holmes Charitable Trust Fund
Hare Family Fund
Helen & Minor Cary Fund
Herbert and Esther Akenson Fund
Jacqueline Gannon Fund
James W. and Patricia T. Peirce Fund
Kern Family Fund
Lagniappe Fund
Lawrence Family Fund
Lillian Award Fund
Michael Gannon Fund
Pattillo Magale Fund
Pike Family Fund
Poitrus Memorial Fund
Ponds Family Fund
R & S Hecq Family Fund
Rylee Fund
S G. McCormack Legacy Fund
Sean Gannon Fund
Sherborn Fund
Sophia R. Lesser Fund
The James Jay Lavelle Memorial Fund
The Tower Fund
The Werner Fund
The Z Fund
Thompson Family Fund
Trustees and Advisers Fund
The Yale Appliance Charitable Fund
USA 500 Clubs Giving Circle Fund

Field of Interest Funds
Support a variety of agencies and programs with the goal of addressing specific issues
A Path in the Woods Fund
Ernestine and Josephine Sigmond Fund
Jackson Youth and Community Fund
MetroWest Watershed Preservation Fund
Sudbury Sportmans Fund

Nonprofit Agency Funds
Support the operations and programs of specific agencies
Adolescent Consultation Services Fund for the Future
Assabet Valley Mastersingers Endowment Fund
Bridge of Central Massachusetts Fund
Charles River Center Endowment
Circle of Hope Fund
Community Therapeutic Day School Endowment Fund
Discovery Museums Fund
Framingham Adult ESL Fund
Garden in the Woods Fund
Heritage Charities Fund
Land’s Sake Fund
Learning Center for Deaf Children Fund
Maynard Community Chest Endowment Fund
Medway Foundation for Education Fund
Metro West YMCA

Scholarship Funds
Support MetroWest students continuing their education
Brendan Petry Memorial Scholarship Fund
The Bruce Scholarship Fund
Dr. Michael & Mary Castrine Memorial Scholarship Fund
Edward L. Riley Memorial Scholarship Fund
The Ennie Peltier Scholars Fund
Gillian Tara Shore Fund
James C. Peckham Scholarship Fund
Jason Balfour Memorial Fund
Juniper Fund
Lt. William J. Cavanaugh, Jr. Memorial Scholarship Fund
Mary June Nylander Seouza Scholarship Fund
Newton South High School Alumni Gift Fund
Rachel Manelli Scholarship Fund
Rick Clark Leadership Fund
Sister Mary Dee Ells Memorial Scholarship Fund
Stephen C. Massey Scholarship Fund
Susan Wamnick Journalism Scholarship Fund
Technology Leadership Legacy Scholarship
Tibetan Nalik High School Scholarship Fund

*Every effort was made to accurately reflect each supporter. If you find an error in the list, please accept our apology and contact our Development Office at 508-647-2260.

Waltham Fields Community Farm

At Waltham Fields Community Farm, one of our most popular food access projects, running for over a decade, is a seasonal market called MOM - Mobile Outreach Market. At MOM, local low-income residents may purchase a share of our farm’s vegetables valued over $30 for just $5 (payable with their SNAP benefits or with cash), or for free in exchange for one of our own vouchers acquired through over a dozen local social service partner organizations.

When COVID-19 hit, the need in Waltham was very visible - local food pantries had lines of people wrapped around the block. This helped inform our decision to switch our MOM program to payment-free for the 2020 season. “Pivoting our programs” was the operational phrase during that time for literally every planned activity. We pivoted MOM - usually a farm stand-style market set up weekly in downtown Waltham - to pre-packaging boxes at our farm with vegetables designed to feed a family of 4 for a week. A hundred boxes were dropped off weekly on a rotating schedule to our community partners in Waltham, who used their networks to notify those in need. We were able to distribute 100% of these pre-packed produce boxes with support from Healthy Waltham, Charles River Community Health, Waltham Boys & Girls Club and the Waltham Housing Authority.

Funding from Foundation for MetroWest helped alleviate the cost of unbudgeted sanitation expenses, waxed produce boxes, and additional staffing to replace volunteer agricultural labor. This funding also helped to cover the loss of MOM revenue – in effect, we were able to pass along the savings to those most in need during a very uncertain and frightening time.

-Stacey Daley, Executive Director, Waltham Fields Community Farm
## 2020 Financial Statements

### Statement of Financial Position

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<thead>
<tr>
<th>ASSETS</th>
<th>2020</th>
<th>2019</th>
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<td>Cash and cash equivalents</td>
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<td>Prepaid expenses and other assets</td>
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<td>Property and equipment – net</td>
<td>13,195</td>
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<td>Operating Lease Asset</td>
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<td>138,058</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$27,665,015</strong></td>
<td><strong>$26,137,022</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$11,562</td>
<td>$6,859</td>
</tr>
<tr>
<td>Grants payable</td>
<td>40,000</td>
<td>20,300</td>
</tr>
<tr>
<td>Operating lease liability</td>
<td>82,642</td>
<td>138,058</td>
</tr>
<tr>
<td>Agency endowment funds</td>
<td>915,722</td>
<td>858,517</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$1,054,755</strong></td>
<td><strong>$1,032,700</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>$21,449,426</td>
<td>$19,583,732</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>3,534,199</td>
<td>3,893,955</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>1,626,635</td>
<td>1,626,635</td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td><strong>26,610,260</strong></td>
<td><strong>25,104,322</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOTAL LIABILITIES AND NET ASSETS</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>$27,665,015</strong></td>
<td><strong>$26,137,022</strong></td>
<td></td>
</tr>
</tbody>
</table>
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At Middlesex Savings Bank, we believe good citizens are the heart of a great community. That's why we're right there with the resources and financial support our local organizations need. Because good citizens give back—and giving back always wins.

Learn more at middlesexbank.com/community
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- Garry R. Holmes

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