

Annual Report

Community Foundation of
North Central Massachusetts

+ 2014

+ *Chairman's Report* PG2

+ *Grants* PG6

+ *Financial* PG17

Helping Donors Do Good Work..*FOREVER*

A young boy with light skin and short blonde hair is looking through a chain-link fence. He is wearing a bright blue t-shirt that has the Girls Club logo and the text "GIRLS CLUB" and "ENBURG" on it. The background is slightly blurred, showing what appears to be an outdoor setting with some foliage. The image is partially covered by large, overlapping curved shapes in shades of green and teal.

Community
Foundation
of North Central Massachusetts

SMART GRANTMAKING STRATEGIES⁺

Helping 33 communities



Dear Friends of the Foundation,

We once again concluded another very productive year thanks to the support of our fund holders, donors and nonprofit partners.

What continues to amaze me is the variety of funds that have been established by our donors—from helping those less fortunate, to animal welfare, education and environmental causes are just a few examples.

One of the significant advantages of working through a community foundation is the flexibility it affords a donor to target their gifts. For example, if a donor wants to target a specific cause, but doesn't want to be actively involved in the grantmaking, they can establish a Field of Interest Fund.

The fund can address needs in an important area of community life, such as at-risk youth, the arts or education. Our board awards grants to community organizations and programs that are making a difference in the area selected by the donor. The gift stays flexible enough to meet community needs in interest areas — even as they change over time.

Grantmaking

One of the key metrics we look at is how much money we are granting and the impact of those grants on the community.

It is the work of our grantmaking committee that makes grants from our unrestricted funds possible. They request annually proposals from virtually all the nonprofits that service the 33-communities we serve.

The committee carefully reviews each proposal and makes recommendations to the full board. Once the grant is made, they monitor the results throughout the year to ensure the nonprofit agency is fulfilling the grant requirements.

Stories

The work of our development and grantmaking committees is vitally important, but it is the stories of our fundholders that make the greatest impact on us. You'll read several stories throughout this annual report. I know for the families who established the funds, it is a meaningful and enduring way to memorialize a loved one...forever.

Again, thank you for your continued support.

James Garrison, Chairman
Community Foundation
of North Central Massachusetts



One of the reasons the Community Foundation has been able to make nearly \$35 million in grants and donor distributions, since 2001, is thanks to our donors and our prudent investment policy, which carefully balances risk and returns. We have enjoyed strong returns which has been instrumental in growing fund balances. To learn more about the power of endowments, please visit our website, cfncm.org



William Wicks Memorial Fund

William D. Wicks lived in Townsend for nearly 25 years, working in the aviation operations field after a lengthy military career in army aviation. After his life was cut short by sudden cardiac arrest in May 2013, his wife, Dorothy, and four sons decided to establish a memorial fund in his name, hoping to assist efforts to research and treat cardiac disease.

Mr. Wicks graduated from flight school in 1970 and served his country for over twenty years as an army aviator. He retired while Chief Warrant Officer at West Point, N.Y., after a long career including service in Vietnam, West Germany, South Korea, and two tours at Fort Devens, where he met Dorothy. During his military career, he earned commendations including the Legion of Merit, the Distinguished Flying Cross, the Meritorious Service Medal and 21 Air Medals for service in

combat.

He went on to a second career, with the Federal Aviation Administration, where he worked as an aviation safety inspector, and in operations in Flight Standards at Windsor Locks, Conn., Hanscom Field and Boston-Logan International Airport, finishing his career with the FAA as the Northeast Region All Weather Operations Specialist in Burlington. He retired from federal service on Dec. 31, 2012.

“We decided to establish a memorial fund in his name, hoping to assist efforts to research and treat cardiac disease.”

He had lived a full life, but cardiac arrest cut short his retirement. For two decades, after bypass surgery, he had been living with cardiac-related illness while working, enjoying golf and following New England sports. After

a friend told Mrs. Wicks about the Community Foundation, she and four sons—Sam, Michael, Billy and Kevin, with their families—chose to direct memorial contributions to the American Heart Association, establishing the William Wicks Memorial Fund.

“I wanted to do a fundraiser in his memory to send money to the American Heart Association so they can continue their efforts in the study of heart disease,” she said. The family established the fund in the spring of 2014 and Mrs. Wicks is well satisfied that it’s doing what they hoped for. “It was great working with the Community Foundation,” she said. “Linda Mack couldn’t have been more supportive.” She appreciates the relief of not having to do the legwork, collect funds or worry about taxes or associated issues. “And, we’ve raised \$6,000 already,” she said.

GLENN A. ROBERTS SCHOLARSHIP FUND +

Love and respect go into the making of a Community Foundation memorial fund, and anyone who receives the scholarship named for Glenn A. Roberts knows that. A captain who led the North Middlesex Regional High School football team, the handsome young player remained involved with successive teams throughout his life. This scholarship recognizes his interest in helping young athletes achieve their goals.

Glenn graduated in 1982. After receiving a business degree from Bridgewater State and a master's in counseling psychology from Fitchburg State College, he began his career at Mount Wachusett Community College in Gardner, where he was associate dean of student support services.

He grew up in Townsend, later residing in Ashby with his wife, Debra. He maintained a relationship with the team, attending practices and games, and sharing some of the life lessons he'd accrued from playing football, says his brother, Troy. When he was diagnosed with ALS (Lou Gehrig's Disease),

Glenn decided to face it squarely. He knew the odds: his grandmother and two aunts had died from the disease. But he translated that challenge into an effort to inspire young North Middlesex football players. "Glenn had a very strong faith, and a very, very strong sense of community and camaraderie with his teammates. His relationships just lasted a lifetime," Troy said.



Some of the students continued on to MWCC, where Glenn helped students receive the services they needed to get ahead. "Glenn was very compassionate; he had a lot of empathy for people, and tried hard to get them through their times at Mount Wachusett and ready to move on," Troy said. He worked there until he was unable to continue any longer.

In 2012, Glenn wrote the team a moving letter, encouraging them to give the upcoming Turkey Day game their best in an uphill battle. He ended it by stating, "I plan on fighting every second of every day. As for you on this Thanksgiving Day, have faith and focus on fighting ... fight on every play and every down."

After his death at age 49 in mid-2013, Troy, his parents, William and Carol, his brother Dana and Glenn's widow, Debra, approached an attorney, who recommended they contact the Community Foundation. "Initially, we thought we were going to have to create our own nonprofit, and there were a lot of hassles with that," Troy said. "Community Foundation made the process so much easier;



they did all the legwork, and knew about all the aspects we didn't know. We want the fund to last, so they invest the money to help us get to the point where this will be a scholarship that will survive." The family hopes to build it up, perhaps even offering two scholarships eventually.

Glenn had remained friendly with Coach Sandy Ruggles at the high school; "Glenn was on the first team that he coached at North Middlesex," Troy said. "A lot of it (the motivation) is the result of Coach Ruggles' work. He has a very strong belief in tradition and the football family. While we were talking as a family about the specifics, it happened coincidentally that Coach Ruggles decided he wanted to honor Glenn as well—so every year he picks a kid and gives them Glenn's number (52) to wear."

The \$500 scholarship is supported through fundraisers and contributions, but also by Community Foundation's fund investment practices. "He really wanted to leave a legacy, try to do some good work even when he was gone, and he wanted to create a scholarship for a North Middlesex football player," said Troy. "My brother had a reputation as being sort of a hard-nosed, hard-working, team-first kid. We wanted to find someone who fit that character."

The family is very satisfied with the memorial fund. "We love it," Troy said. "It's incredibly satisfying to have been able to give a scholarship this year at the senior banquet to Joseph Sullivan, a kid I had coached in baseball. The coach recommended him—he shared a lot of traits with Glenn. It was awesome to not have to worry about it. We can raise money to put into it, but the rest is there. The fund pays out to the student. People can donate directly that way, so it makes the whole process so much easier than if we'd done it ourselves."

**"Glenn had a very strong faith,
and a very, very strong sense
of community and camaraderie
with his teammates. His
relationships just lasted a
lifetime."**

FOUNDATION MAKES 23 GRANTS⁺

The Foundation made 23 grants in total, which included seven made from the Foundation's general endowment:

CASA Project, Inc., Worcester, received \$14,910 to provide advocacy for child victims in the court system in North Central Massachusetts.

A \$9,940 grant was made to **Community Legal Aid, Inc.**, Worcester, to help local families who are homeless move out of crisis and toward stability by providing free legal assistance to obtain shelter.

L.U.K. Crisis Center, Inc., Fitchburg, received a \$16,898 grant for its North Central Runaway and Homeless Youth Network, which proactively reaches out to the young adult homeless population.

To provide mentoring services to homeless families, **Montachusett Interfaith Hospitality Network, Inc.** in Leominster received a \$19,880 grant.

A \$3,979 grant to **The Salvation Army, Athol Corps**, will fund a safe haven to keep children physically active at critical times during the year.

The Salvation Army, Montachusett Corps, based in Fitchburg, received a \$9,940 grant to reduce juvenile crime by improving school attendance and grades.

A grant of \$2,982 will help the **Sterling Council on Aging** purchase 125 carbon monoxide detectors for elderly residents.

A fund established for environmental causes and animal welfare made seven grants:

Friends of Sholan Farms, Inc. in Leominster received \$10,000 for developing the second phase of its master strategic plan.

A \$14,000 grant to **Groton Conservation Trust** will be used to reduce invasive species, with the goal of sharing best practices with surrounding communities.

Just Understand My Potential, Inc., Harvard, received \$2,000 to help at-risk youth and young adults access the outdoor environment in a meaningful way.

A \$4,000 grant to the **Massachusetts Audubon Society, Inc.** will be used for a science education program for third-and fourth-grade teachers at Crocker Elementary School in Fitchburg.

Merrimack River Feline Rescue Society, Salisbury, received a \$10,000 grant to provide low-cost spay services for cats belonging to residents of Fitchburg, Gardner and Leominster.

The completion of 25 new trails will happen for the **Millers River Watershed Council, Inc.** in the Athol area, thanks to a \$9,250 grant for their Upper Millers-Otter Blue Trails.

These grants were made possible by: Community Foundation of North Central Massachusetts General Endowment Fund; Community Foundation Organizational Fund for Non-Profits; Community Foundation Endowed Fund for Critical Needs; Community Foundation of North Central Massachusetts Educational Access Fund; Anderson, Bagley & Mayo Fund; W.E. Aubuchon, Jr. Fund; Brown Petersen Endowment Fund; IC Federal Credit Union Founders Fund; K.R.C. Family Fund; Allen and Barbara Rome Fund; and the Nashoba Regional Endowment Fund.



Kylee McCumber, Kylee's Kare for Kidz, Inc.



Montachusett Interfaith Hospitality Network

At-risk youth will get vocational and educational experience through **The Trustees of Reservations** program, Leominster Regional Youth Conservation Corps, which received a \$15,000 grant.

A fund established for organizational development made six grants:

A \$9,890 grant to **Athol Orange Community Television, Inc.** will provide FM access to local programing and municipal meetings.

Seven Hills' Children's Aid & Family Services in Fitchburg received a \$5,528 grant to purchase computer equipment and software for its Child Enrichment Center.

A \$14,835 grant to the **Friends of the Templeton Elders** will be used to expand its food programs.

Fruitlands Museums, Inc. of Harvard received a \$4,958 grant to develop a strategic business and facilities plan.

Gardner's **House of Peace & Education, Inc.** received a \$9,890 grant for its Hopeful Boutique, a nonprofit enterprise that provides educational programs.

A \$14,835 grant to **Twin Cities Community Development Corporation** in Fitchburg will be used for a regionalization project.

The Foundation's Critical Needs Fund addressing basic human needs made three grants:

Kylee's Kare Kits for Kidz, Inc. of Leominster received a \$10,000 grant to provide food assistance to students attending Leominster Public Schools.

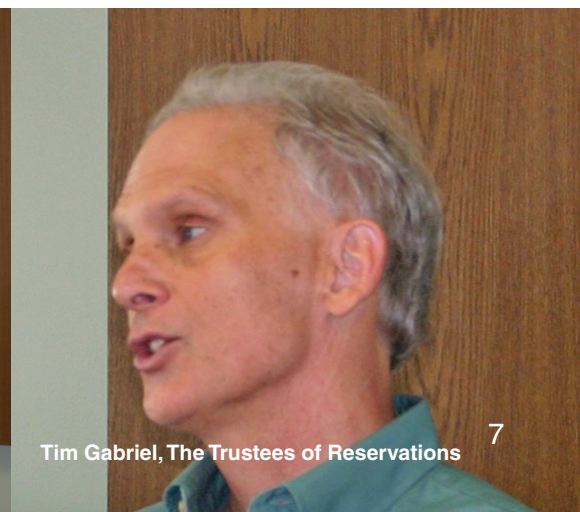
A \$5,000 grant was made to **Our Father's Table** in Fitchburg, which provides hot meals to local families in need.

The Foundation's Educational Access Fund made a \$75,000 grant to **Mount Wachusett Community College** for their scholarship program.

"What continues to impress me is the quality of the programs that we had the opportunity to support," said Phil Grzewinski, President of the Community Foundation of North Central Massachusetts.



Marc Dohan, Twin Cities CDC



Tim Gabriel, The Trustees of Reservations



Boys & Girls Club

GRANTS TARGET HEALTH +

The Community Foundation of North Central Massachusetts and the Greater Lowell Community Foundation awarded 14 grants from designated funds to help improve the health of residents in 13 communities in the region from a designated fund.

The **Ayer Fire Department** purchased an automated CPR device through its \$13,910 grant.

Boys & Girls Club of Lunenburg's \$7,500 grant will fund its summer program "Passport to Fun," which promotes health and fitness activities for Lunenburg youth.

Community Legal Aid, Inc. received a \$15,000 grant to provide domestic violence legal aid to senior citizens living in the Nashoba Valley region.

Cooperative Elder Services, Inc. will use a \$5,000 grant for its Scholarship Program for Frail Elders, which funds health services for elders residing in the Nashoba Valley.

Indian Hill Music will expand its Music Therapy Outreach program through an \$8,500 grant.

A \$20,000 grant to **Loaves & Fishes Food Pantry, Inc.** will support its program, Lifting & Feeding Our Neighbors.

L.U.K. Crisis Center, Inc. will use its \$18,000 grant to provide suicide prevention services to youth in the Nashoba Valley region.

A \$5,000 grant to **MAB Community Services, Inc.** will provide vision care to the low-income population.

Our Father's House, Inc. received a \$16,000 grant to provide nutrition to homeless families in Devens.

Pathways for Change, Inc. will expand its program of teaching young males non-violent behavior in the Nashoba Valley region through its \$10,000 grant.

Shirley Council on Aging received a \$4,500 grant to provide extended transportation to hospitals outside the region.

Teenage Anxiety & Depression Solutions will use a \$12,000 grant to create a local hotline for suicide prevention.

Westford Against Substance Abuse will spread awareness of the dangers of substance abuse and shed light on effective treatment practices through its \$5,000 grant.

A \$7,500 grant to **Youth Opportunities Upheld, Inc.** will provide education and supportive services to local residents through the Gardner Family Center.

The Nashoba Valley Community Health Care Fund and the Nashoba Valley Professional Health Care Fund were established to support the general purposes of community health care in the Nashoba region. It provides annual distributions to nonprofit organizations, municipalities and other agencies, to advance the health of residents in 13 communities originally served by the hospital, including Ashby, Ayer, Bolton, Dunstable, Groton, Harvard, Lancaster, Littleton, Lunenburg, Pepperell, Shirley, Townsend and Westford.

"The breadth and reach of these grants is very impressive," said Phil Grzewinski, president of the Community Foundation of North Central Massachusetts.



Loaves & Fishes Food Pantry

A TRAGEDY BECOMES A CAUSE⁺

A PASSION FOR MUSIC

A FUND IS ESTABLISHED TO CARRY ON MR. MCCULLOCH'S PASSION FOR MUSIC

Established in 2012, the Alan McCulloch Fund will benefit musical programs in the Leominster area, on an ongoing basis. The fund is generally aimed at the student level. Mr. McCulloch, a Leominster computer consultant, died April 7, 2010, after a heart attack. As his designated executor and trustee, Henri Frye, CPA, set up the approximately \$750,000 fund in memory of his client of 25 years.



"He was a very frugal guy, and he loved music," said Mr. Frye. "He gave away a lot of CDs and records to nonprofit radio stations." Mr. McCulloch, who was

unmarried, also loved to travel, and the Fries enjoyed speaking with him about various Caribbean islands he'd visited. "He was also a big fan of Bob Marley," he said. He was a graduate of the Leominster High School Class of 1970, and attended several class reunions.

"His will designated that nearly three-quarters of a million dollars would be given away to charity, and we felt we should do something locally, with his love of music. It will be an endowed designated fund, so it can be an ongoing gift," Mr. Frye said. School music and similar programs are the most likely recipients.



Brittany Loring hasn't let tragedy shut her off from living and sharing with the world. She's giving back, in recognition of the help she received.

The Ayer resident, severely injured in the Boston Marathon bombing of April 15, 2013, spent long weeks and months with doctors, physical therapists and family as she worked to regain strength and mobility.

She has since refused to allow the tragedy to define her.

Because so many people reached out to help Brittany recover, contributing funds along with well wishes, she has turned around to help those like herself. Anyone struggling to recover from marathon injuries, damage suffered in another terrorist attack or other traumatic events is eligible for assistance with long-term medical or psychological recovery costs through the Community Foundation's Brittany Fund for Trauma and Recovery.

"They could need help with rent, medical devices, therapy, a lot of different things," she said. Also eligible for assistance, she says: "Good samaritans and first responders who were injured trying to help someone. Families who lose a member to these events and incur losses may also receive help."

Brittany, a graduate of Bromfield School in Harvard, continued with her education. She graduated from Boston College in 2013 with a dual degree in law and business, and is now working in the field of international taxation. She married after her recovery as well, though she still receives physical therapy to help her gain strength.

"I'm doing great," she said. "Overall, I'm back to my normal life, working, living. I want to give back to people and try to help them with their recovery, because I was given so much with mine."

People can contribute to the fund at brittanyfund.org, where there is a direct link to the Community Foundation fund. There is also information on that site for fundraising activities being held in 2015.

DONOR DISTRIBUTIONS +

21st Century - \$35,953
Applewild School - \$5,000
Athol Orange Community Television, Inc. - \$9,890
Auburn Public Schools - \$5,000
Ayer Fire Department - \$7,484
Bernardian Fund - \$15,736
Boys & Girls Club of Fitchburg and Leominster - \$188,561
The CASA Project, Inc. - \$14,910
Children's Aid & Family Service - \$5,528
Colby College Annual Fund - \$10,000
Community Health Connection - \$341,944
Community Legal Aid, Inc. - \$18,010
Devens Historical Museum - \$5,000
Doyle Field - \$61,3000
Fitchburg Art Museum - \$11,000
Fitchburg Historical Society - \$53,790
Fitchburg State University Foundation - \$57,138
Friends of Sholan Farms, Inc. - \$10,000
Friends of Templeton Elders - \$14,835
Groton Community Foundation Fund - \$17,000
Groton Conservation Trust - \$14,080
Groton Dunstable Education Foundation - \$6,000
Groton School Annual Fund - \$5,000
GVNA Food Pantry - \$5,000
Habitat for Humanity, North Central Mass., Inc. - \$16,000
House of Peace & Education, Inc. - \$9,890
Indian Hill Music Center - \$65,000
Jewish Family Services - \$5,000
Kylee's Kare Kits for Kidz - \$10,000
Lawrence Academy - \$10,000
Leominster Education Foundation, LLC - \$5,000
Loaves & Fishes Food Pantry, Inc. - \$10,760
LUK Crisis Center Inc. - \$26,582
Massachusetts Watershed Coalition Inc. - \$30,000
Merrimack River Feline Rescue Society - \$10,000
Millbury Lions Foundation, Inc. - \$5,000
Millers River Watershed Council, Inc. - \$9,250
Miracle Recreation Equipment - \$30,000
Montachusett Interfaith Hospitality Network - \$19,880
Montachusett Opportunity Council - \$7,500
Montachusett Regional Vocational Technical School - \$34,512
Montachusett Society for the Preservation of Historic Buildings - \$25,000
Morgan Memorial Goodwill - \$15,000
Morgan Shepard Charity - \$10,000
Mount Wachusett Community College Foundation - \$118,394

Mount Wachusett Community College - \$105,000
Nashua River Watershed Association, Inc. - \$173,009
Nashua Valley Council, Boy Scouts of America - \$130,030
New England Farm Workers Council - \$20,000
NMRS Scholarship Fund - \$12,000
Friends of Northboro Recreation Fund - \$14,000
On Boys & Girls Club Guard Initiative - \$11,921
Our Father's House Inc. - \$8,608
Our Father's Table - \$10,000
Pathways for Change - \$5,380
River Cities United Way - \$27,988
Salvation Army - \$14,940
Shine Initiative Fund - \$5,245
Social Venture Partners - \$15,000
Spanish American Center Inc. - \$105,000
St. Leo School - \$9,606
Sterling Greenery Community Park, Friends of - \$9,408
Teenage Anxiety and Depresssion Solutions - \$6,456
Thayer Symphony Orchestra Inc. - \$23,411
Townsend Ecumenical Outreach - \$6,000
Trustees of Reservations - \$15,000
Trustees of the Lawrence Academy at Groton - \$8,000
Twin Cities Community Development Corp. - \$14,835
Twin City Youth Hockey Association - \$8,000
UMass Memorial Foundation - \$25,000
United Way of Central Alabama - \$47,581
United Way of Greater Stark County - \$30,859
United Way of Greater Ennis - \$26,175
United Way of Laurens County - \$43,536
United Way of North Central Massachusetts - \$483,048
United Way of Tri-County - \$9,500
Worcester Public Schools - \$5,000

Donor Advised Funds are established by individuals who want to play an active role in the distribution process. This year \$3,419,178 in distributions were made to a variety of organizations.

*Represents distributions of \$5K or more.
For a complete listing, please visit our website, cfncm.org*



DONORS CAN MAKE A DIFFERENCE

Donor Funds are convenient, flexible tools for individuals, families, businesses, or groups that want to be personally involved in suggesting grant awards made possible by their gifts.

Unrestricted Fund. Community Foundation of North Central Massachusetts General Endowment Fund (2001) - This and the regional endowment funds have been established to respond to a wide range of community needs. The flexibility of your unrestricted gift enables your community foundation's program experts to respond to the community's most pressing needs, today and tomorrow. In addition, donors can target their gift to a specific region and make it a named fund.

Donor Advised Funds. You can have ongoing involvement in the use of your gift. You work with our professional program staff, identifying ways to use dollars from the Donor Advised Fund you establish to address the issues and needs you care about most. Your recommendations are submitted to our local board for approval; we then distribute grant dollars.

Field of Interest Funds. You can target your gift to address needs in an important area of community life. Arts. AIDS. Aging. At-risk youth. You identify your personal interest area when making your gift; our board awards grants to community organizations and programs that are making a difference in the area you select.

Scholarship Funds. You can invest your gift in our community's future and show students you care, all with the guidance and personal services of your community foundation. You determine the criteria students must meet to receive the Scholarship you establish. With your assistance, students achieve their academic and career-oriented goals—from preschool to postgraduate work.

Designated Funds. You can direct your gift to a specific nonprofit organization. Help provide ongoing funding for a senior center, museum, or virtually any nonprofit charitable organization. Nonprofit organizations can use a Designated Fund through the community foundation to build long-term financial stability and enhance their ability to accept large and complex gifts.

Agency/Non-Profit Funds. An Agency/Nonprofit endowment is a simple and efficient way to take advantage of our sophisticated investment strategy and other support services. Your board determines how much to invest long term. Each year your organization can take a distribution from the fund, creating a permanent source of income.

NEW FUNDS +

United Way of North Central Massachusetts Endowment Fund

This fund was established by the United Way of North Central Massachusetts as a permanent endowment to create an additional source of income to help further United Way's mission of creating opportunities for a better life for all in North Central Massachusetts.

Bill Mehr Sport Parachuting Memorial Fund

This fund has been established in memory of Bill Mehr, pioneer sport parachutist and pilot. The fund will provide ongoing support to maintain a memorial site located at the birthplace of sport parachuting in the United States, the Orange Municipal Airport.

The Shepherd Family Scholarship Fund

This fund was established to provide scholarship aid to North Middlesex Regional High School students interested in agriculture and emergency medical training.

Boys & Girls Club of Fitchburg & Leominster Endowment Fund

This fund was established to provide a permanent endowment to support operations of the Boys & Girls Club of Fitchburg & Leominster.

Marilyn Fratturelli Legacy Project Fund

This fund was established to provide scholarships to Leominster High School students.

Fitchburg Riverfront Park Stage Fund

This fund was established for the Riverfront Park.

Frances Daigneault Scholarship Fund

The purpose of this fund is to provide scholarships to Leominster High School's graduating seniors.

Friends of Fitchburg Animal Shelter Fund

The Friends of Fitchburg Animal Shelter's (FAS) mission is to provide items of necessity and comfort, medical care and emergency funds for animals waiting for their forever homes while being cared for at the Fitchburg Animal Shelter.

Red Raiders Lending Library Fund

A literacy program supporting children in the Fitchburg Public Schools.

William Wicks Memorial Fund

The purpose of the fund is to support the charitable interest of the donor, which includes the American Heart Association.

Suade M. Kelley-Cooley Scholarship Fund

The purpose of the fund is to provide scholarships for continued post-education for students from the Leominster CTE classes.

Glenn A. Roberts Scholarship Fund

The purpose of the fund is to provide scholarships for a North Middlesex Regional High School football player.

Judith Binnall Rose Nursing Scholarship Fund

The purpose of the fund is to provide scholarships that benefit students committed to pursuing or furthering a career in nursing.

Lee Edward Roberts Christian Scholarship Fund

The purpose of the fund is to provide scholarships to K-12 students attending private, Bible-based, born-again Christian school.

The Chris Franzeim Foundation Fund

The purpose of the fund is to provide scholarships to junior or senior high school students who have experienced a significant life event that is adversely affecting their ability to excel in school.

Townsend Historical Restricted Fund

The purpose of the fund is to preserve and grow the principal for the Townsend Historical Society.

Townsend Historical Society Unrestricted Fund

The purpose of the fund is to provide supplemental income for the Townsend Historical Society.

Harold F. & Elsie E. Root Scholarship Fund

The purpose of the fund is to provide scholarships to Fitchburg High School and St. Bernard's High School seniors.

The Chris Franzeim Foundation Fund

The purpose of the fund is to provide scholarships to students who have experienced a significant life event that adversely affected their ability to excel in school.

Dick Barnaby Leominster Legion Baseball Scholarship Fund

The purpose of the fund is to provide scholarships to baseball players who plan on attending college.

Francis S. Marston Trust Fund

This is a designated fund to benefit the community of Ashby.

Committed to Canines and Felines Fund

The purpose of the fund is to financially assist pet owners with medical expenses, and training of dogs at risk of being re-homed due to behavioral issues.

Emile Johnson Jr. Fund

To provide funds for scholarships for Leominster High School baseball players.

Friends of Fitchburg Veterans Fund

Established to support veterans of Fitchburg.

Allen and Barbara Rome Fund

An endowed fund to benefit the General Endowment of the Community Foundation of North Central Massachusetts.

Over twenty-five new funds

were established during our

fiscal year. The purpose of

the funds are as varied as the

individuals and organizations

that established them.

FUNDS AT THE FOUNDATION

Anonymous Funds (4) - Donor-advised funds to support the charitable interests of the donors.

ACE (Animal Care & Education Central Massachusetts) (2011) - Dedicated to the care of animals in need and committed to educating the school children and families of North Central Massachusetts about pet care and responsibility.

Christopher J. Alvarez Endowment Fund (2004) - To support educational health programs at the Boys & Girls Club of North Central Massachusetts.

Amy's Angels Foundation Fund (2012) - To help Lancaster area families in need of assistance due to illness or other unexpected tragedies.

Anderson, Bagley & Mayo Fund (2005) - An endowed fund to benefit the General Endowment of the Community Foundation of North Central Massachusetts.

Ronald M. Ansin Fund (2000) - To support the charitable interests of the donor.

ARC of Opportunity in North Central Massachusetts Fund (2005) - This is a fund dedicated to "Helping people with disabilities reach their full potential."

Athol Area YMCA Fund (2004) - Dedicated to supporting the YMCA programs in the Athol area.

Aubuchon Foundation (2008) - This is a corporate fund dedicated to supporting the charitable interests of the W.E. Aubuchon Company, Inc. and its employees.

W.E. Aubuchon, Jr. Fund (2008) - An endowed fund dedicated to the memory of W.E. Aubuchon, Jr. that benefits the General Endowment of the Community Foundation of North Central Massachusetts.

Beers for Good Fund (2010) - A fund to support the charitable interests of the donor.

Bellew-Jouzaitis Fund (2012) - Established to support the charitable interest of the donor.

Bemis Community Investment Fund (2011) - Established to support the charitable interest of the donor.

Gerald E. Bieler Memorial Fund (2011) - To benefit the Nashua Valley Council Boy Scouts of America.

Boys & Girls Club of North Central Mass Endowment Fund (2003) - To support after-school programs for children in North Central Massachusetts.

Boys & Girls Club of NCM Endowment Fund (2009) - Established to provide a permanent endowment to support operations of the Boys & Girls Club of North Central Massachusetts.

Carol & Norman Boudreau Fund (2008) - This fund was created to honor the many years of charitable work of Carol and Norman Boudreau and supports the grants of the Foundation's General Endowment.

Brown/Peterson Family Foundation Fund (2007) - To support the charitable interests of the donor.

Brown/Peterson Endowment Fund (2007) - An endowed fund to benefit the General Endowment of the Community Foundation of North Central Massachusetts.

Brittany's Fund (2013) - The Brittany Fund has been set up to serve Boston Marathon victims with long-term costs associated with their injuries and psychological effects from the events of April 15, 2013. The fund will also assist victims of other traumatic events.

Care Packages for Soldiers Fund (2011) - Established to raise money to send care packages to our deployed troops.

Center for Civic Learning and Community Engagement at Mount Wachusett Community College (2011) - A fund that will support the work of the Center for Civic Learning and Community Engagement.

Matt Charette Memorial Fund (2011) - Established to continue Matt's charitable legacy.

Lance Corporal Geoffrey Cayer Fund (2006) - To support programs that were of interest to Geoffrey in North Central Massachusetts.

Michael Cavanna Memorial Fund (2010) - To support the charitable interests of the donors.

Choose To Be Part Of Your Miracle Foundation Fund (2005) - To support the charitable interests of the donors.

Cleghorn Neighborhood Center Community Initiative Fund (2004) - For the betterment of the Cleghorn Community Leadership Development / Task Forces.

Community Foundation of North Central Massachusetts Educational Access Fund (2012) - To provide financial aid to college students and/or to support existing scholarship aid funds in the region serviced by the Community Foundation of North Central Massachusetts.

Community Foundation of North Central Massachusetts Endowed Fund for Critical Needs (2012) - Created to support critical needs programs.

Community Foundation of North Central Massachusetts General Endowment Fund (2001) - This and the regional endowment funds have been established to respond to a wide range of community needs. The flexibility of your unrestricted gift enables your community foundation's program experts to respond to the community's most pressing needs, today and tomorrow. In addition, donors can target their gift to a specific region that can accept gifts of any size.

Community Foundation of North Central Massachusetts Organizational Fund for Non-Profits (2012) - Created to support capacity building of nonprofit organizations.

Community Health Connections Family Health Center Fund (2004) - To benefit the Community Health Connections Family Health Center.

Community Health Connections - Homestretch Campaign (2011) - This fund was established to make it possible for Community Health Connections' Fitchburg Community Health Center to move into a new building.

Connors Family Fund (2004) - To support the charitable interests of the donors.

Crocker Field Restoration Fund (2007) - An agency fund dedicated to the restoration of Crocker Field in Fitchburg, Massachusetts.

David Oikemus Fund (2007) - Established to benefit North Central Human Services, Inc.

Doyle Field Foundation Endowment (2006) - To provide for the maintenance and future needs of Doyle Field in Leominster, Massachusetts.

Doyle Endowment for the Benefit of Doyle Field (2009) - The fund will help provide for the maintenance and upkeep of Doyle Field in Leominster.

Doyle General Endowment Fund (2009) - This fund is part of the Foundation's General Endowment Fund. The Doyle fund provides a permanent source of funds to benefit environmental and animal issues.

The Dream Endowment (2004) - Created by Andrea and Sergio Paez to provide an opportunity for underprivileged immigrant students to go to college.

FUNDS AT THE FOUNDATION+

FATV Robert Wilson Memorial Fund (2008) - It was created to honor the memory of Robert Wilson and benefit Fitchburg Access Television.

Fitchburg Access Television Fund (2006) - A fund that will support Fitchburg Access Television.

Fitchburg Schools After School Program Fund (2008) - A fund that will support after school programs for Fitchburg youth.

Fitchburg Schools Art Enrichment Fund (2008) - A fund that will support art enrichment programs for Fitchburg youth.

Fitchburg Cultural Alliance Fund (2010) - Established to support the work of the Fitchburg Cultural Alliance.

Fitchburg Education Foundation Fund (2008) - This fund was created to benefit and enhance the education provided in the Fitchburg Public Schools.

Fitchburg Greenway Fund (2010) - To support the charitable interests of the donor.

Fitchburg Historical Society Endowment Fund (2006) - Created to provide funds to support the Fitchburg Historical Society.

Fitchburg Riverfront Parks and Trails Fund (2011) - The Riverfront Parks and Trails Fund assists the City of Fitchburg in the establishment, operation, maintenance and programming conducted at riverfront parks and trails.

Fort Devens Museum Fund (2007) - As an agency fund it will benefit the Fort Devens Museum.

Friends of Northborough Recreation Fund (2011) - This fund was established to support the activities of the Friends of Northborough Recreation.

GVNA Healthcare, Inc. Endowment Fund (2007) - Created a fund to benefit its mission of providing high quality, affordable health and social services.

Gateway Park Endowment Fund (2010) - To help maintain the park.

Charles & Janis Gelinis Fund (2004) - To support the charitable interests of the donors.

GAAAFSN (Greater Athol Area Advocates For Families With Specific Needs) Fund (2012) - To assist parents in the greater Athol area afflicted with psychological issues in the rearing of their children. Family counseling, physician referrals and social service aid are offered through a dignified program.

Groton Community Foundation Fund (2005) - To provide funds to build and maintain a Community Center in the town of Groton, Massachusetts.

Groton-Dunstable Alliance for Youth Fund (G-DAY) (2011) - G-DAY is a community coalition that brings informative and effective youth development programs to our community.

HealthAlliance Guild Endowment Fund (2009) - To support the charitable interests of the HealthAlliance Guild.

Hubbardston Center School Playground Fund (2010) - Established to raise funds to build a playground at the Hubbardston Center School.

IC Federal Credit Union Founders Fund (2007) - An endowed fund to benefit the General Endowment of the Community Foundation of North Central Massachusetts.

K.R.C. Family Fund (2006) - An endowed fund to benefit the General Endowment of the Community Foundation of North Central Massachusetts.

Marc and Michelle LaFrance Fund (2009) - To support the charitable interests of the donors.

Ted & Connie Lapres Fund (2006) - To support the charitable interests of the donors.

Debbie Lefebvre Fund (2004) - To support the charitable interests of the donors.

Leominster Education Foundation Fund (2007) - Established as an agency fund dedicated to supporting the Leominster Education Foundation.

Leominster Library Building Fund (2003) - To provide funds to expand and renovate the Leominster Library.

Longsjo Legacy of Champions Fund (2004) - To provide funds for the Fitchburg Longsjo Classic Cycling Race held each July and to promote the sport of cycling in North Central Massachusetts.

Friends of Lunenburg Library Endowment Fund (2003) - To benefit the Lunenburg Public Library.

Maranda-Gosselin Charitable Fund (2004) - To support the charitable interests of the donors.

William E. May Endowment Fund (2007) - An endowed fund to benefit the Friends of Townsend Seniors.

Alan McCulloch Fund (2012) - Established as a donor-advised fund in memory of Alan McCulloch.

Marilyn & David McKeehan Family Fund (2009) - Established to support the charitable interests of the donors.

Michael's Run to Benefit The SHINE INITIATIVE Fund (2011) - Established to support The SHINE INITIATIVE.

Montachusett Home Care Corporation Fund (2008) - Created to benefit the mission of organization.

Montachusett Society for the Preservation of Historic Buildings Fund (2005) - To provide funds to preserve historic buildings.

Monty Tech Foundation Fund (2012) - Established to provide scholarships and other activities that support the mission of the school.

Claire P. Moran Memorial Fund (2008) - To support the charitable interests of the donor.

Miles for Myles Fund (2007) - Established to benefit the Lunenburg Track & Athletic Fields Association.

Nashoba Literacy Fund (2001) - To support literacy in the Nashoba region and North Central Massachusetts.

Nashoba Valley Community Healthcare Fund (2006) - Created to support the general purposes of community health care in the Nashoba Region with areas of focus in health education of the general public, hospice care, home health care and long term care services.

Nashua River Watershed Association Fund (2005) - To enhance the capacity of the Nashua River Watershed Association to protect and manage natural resources in the Nashua River Watershed.

Nashua River Watershed Association Endowment Fund (2007) - Established as an endowed fund to benefit the Nashua River Watershed Association.

Nashua Valley Council Boy Scouts of America Fund (2004) - Created to support the scouting programs within the Nashua Valley Council.

FUNDS AT THE FOUNDATION

Yung Nguyen Foundation Fund (2007) - To support the charitable interests of the donor.

Helen Nobile Fund (2001) - To support literacy and Rosary Hill Home.

Nobile Family Fund (2003) - To support the charitable interests of the donors.

Friends of Northborough Recreation Fund (2011) - This fund was established to support the activities of the Friends of Northborough Recreation.

North Central Massachusetts Literacy Endowment Fund (2000) - To promote literacy in North Central Massachusetts.

Grace Oliver Legacy Fund (2009) - To benefit charities in North Central Massachusetts that utilize nature and animals to help people improve the quality of their lives.

Outreach to Teach Fund (2009) - Established to support the well-being, education and development of the youth in the City of Fitchburg.

Melinda L. Persons Domestic Violence Educational Endowment Fund (2005) - To provide domestic violence educational programming through Battered Women's Resources, Inc.

North Quabbin Citizen Advocacy Endowment Fund (2007) - Established as an endowed fund to benefit the North Quabbin Citizen Advocacy.

North Quabbin Community Coalition Fund (2006) - Established to benefit the work of the North Quabbin Community Coalition.

Quabbin OCU Wilderness Fund (2008) - Established to support the charitable interests of the donor.

Reingold School Leadership Academy Fund (2009) - Established to support the well-being, education and development of the youth at Reingold School.

Pauline A. Riley Endowment Fund (2008) - To support the charitable interests of the donors.

Riverfront Children's Theatre Fund (2012) - Established to provide a regional theatrical program in Fitchburg for children interested in pursuing a hobby in the performing arts.

Sholan Farms Development Fund (2008) - Established to support the work of Sholan Farms in Leominster, Mass.

David W. & Barbara A. Somero Charitable Foundation Fund (2004) - Established to support the charitable interests of the donor.

Southborough Library Fund (2011) - Established to benefit the Southborough Library in Southborough, Mass.

Sterilite Corporation Fund (2006) - To support the charitable interests of the donor.

Friends of Sterling Greenery Community Park (2007) - This fund will be used to improve the community's parks.

St. Leo's School Endowment Fund (2011) - Established to benefit Catholic education at St. Leo's.

Steven & Jennifer Stone Fund (2013) - To support the charitable interest of the donor.

Pearl A. Russell – Howard Park/Townsend Historical Society Fund (2008) - Established as an endowed fund to protect Howard Park and benefit the Townsend Historical Society.

SHINE Initiative Fund (2006) - Created as a Field of Interest Fund to benefit mental illness research, advocacy/awareness and direct service & support.

Thayer Symphony Orchestra Endowment (2006) - Established to benefit the work of the Thayer Symphony Orchestra.

Bert Tompkins Award Fund (2013) - The purpose is to give an annual award to one or more staff members who exemplify the mission, vision and culture of LUK.

Townsend Public Library Endowment Fund (2009) - This agency endowment fund was established to benefit the Townsend Public Library in Townsend, Massachusetts.

Friends of Townsend Seniors Fund (2007) - Dedicated to supporting the Friends of Townsend Seniors.

Twin City Trail Association Fund (2003) - To provide funds to develop recreational trails in the cities of Fitchburg and Leominster.

Upton Building Renovation Fund (2011) - Established to support the capital campaign for the renovation of its building.

Valuing Our Children Fund (2004) - To maintain funds to benefit Valuing Our Children in Athol, Massachusetts.

The Village School New Building Fund (2007) - To provide funds to build a new home for The Village School.

David C. Wells Memorial Fund (2003) - To memorialize a community leader and further his charitable interests.

Westminster Historical Society Endowment Fund (2011) - The earnings from this restricted fund are used to support building maintenance and operating expenses of the Westminster Historical Society.

Zach's Goal Fund (2013) - Established in memory of Zachary D. Constant to fund the Fitchburg Twin City Youth Hockey Association's "No Player Left Behind Program". "Our wish is for Zach's spirit to live on through children learning to play ice hockey, people being kind and generous to one another, and that he is happy saving goals in Heaven."

SCHOLARSHIP FUNDS+

Anthony J. and Fannie M. Alario Scholarship Fund (2012) - Established to provide scholarships for St. Anthony's in Fitchburg, Mass.

Cheryl Ann Cetrino-Fish Scholarship Fund (2004) - To provide scholarships to graduating seniors at Lunenburg High School.

Janis Bresnahan Scholarship Fund (2012) - Established in memory of Janis Bresnahan, who was a graduate of Ayer High School. This scholarship is for Ayer High School students who intend to pursue a degree in childhood development or education.

Jakob Chesbrough Memorial Scholarship Fund (2010) - To provide scholarships to students graduating from the Leominster Center for Technical Education. This scholarship is specifically for students graduating from the Machine Shop to help further their careers or education in the trade.

Makenzie Goode Memorial Athletic Scholarship Fund (2010) - To provide scholarships to students graduating from Pioneer Valley Regional High School.

Kyle G. Flood Scholarship Fund (2007) - To provide scholarships to graduating seniors at R.C. Mahar Regional High School.

Marilyn Fratturelli Legacy Fund (2013) - Established to provide scholarships to Leominster High School students.

Janine Holston Memorial Music Scholarship Fund (2009) - To provide scholarships to R.C. Mahar graduates who are majoring or minoring in music education, music theory, music performance or performing arts.

Chad F. LeBouf Memorial Scholarship Fund (2013) - The purpose of the fund is to provide scholarships to nursing students entering a 2- 3- or 4-year school.

Robert C. Langlois Scholarship Fund (2002) - Created by family and friends to provide scholarships for graduating seniors of Gardner High School.

North Middlesex Regional Scholarship Foundation Fund (2012) - This fund offers financial assistance to NMRHS graduating students pursuing a degree or attending a technical college upon commencement.

Narragansett Regional High School Class of 1973 Scholarship Fund (2004) - The NRHS Class of 1973 provides scholarships for graduating seniors at Narragansett Regional High School.

Nashoba Valley Professional Healthcare Education Fund (2006) - Established to support professional education of employees of health care facilities, which includes nurses and technicians, in the Nashoba region.

Mark Osowski Memorial Scholarship Fund (2004) - For striving young athletes graduating from Leominster High School.

Carl W. Proctor Scholarship and Prize Fund (2010) - Established to provide scholarships and prizes to graduating Seniors of Lunenburg High School.

Gregory Reeves Endowment Memorial Scholarship Fund (2010) - This fund supports annual scholarships awarded to North Middlesex Regional High School seniors.

Rotary Club of Fitchburg Scholarship Fund (2005) - For graduating seniors in the city of Fitchburg, Massachusetts.

Pearl A. Russell Mathematics Scholarship Fund (2006) - For graduating North Middlesex Regional High School students majoring in the field of Mathematics.

Sterilite Scholars Fund for Fitchburg State University (2009) - Established as a permanent endowment to provide scholarships and/or support related services to selected undergraduate students of Fitchburg State University.

Sterilite Scholarship and Student Success Fund for Mount Wachusett Community College (2009) - Established to provide scholarships and/or support related services to selected students of Mount Wachusett Community College.

St. Leo School Scholarship Endowment Fund (2013) - The purpose of the fund is to provide scholarships to current and incoming students of St. Leo School, Leominster, Mass.

Captain Christopher Sullivan Scholarship Fund (2012) - To provide scholarship aid for graduating students living in Princeton, Mass. that attend either Wachusett Regional High School or Montachusett Technical High School.

Westminster Historical Society Scholarship Fund (2011) - Established to provide scholarships for graduating students from the town of Westminster, Mass.

FINANCIAL INFORMATION

	2014	2013	2012
Total Assets	\$37,712,372	\$33,716,967	\$30,851,803
Operating Expenses	\$ 346,510	\$ 296,404	\$ 306,295
Revenues	\$ 6,658,621	\$ 7,367,645	\$16,225,822
Grants & Donor Advised Distributions	\$ 3,298,825	\$ 6,886,623	\$ 9,054,180

Funds of the Community Foundation

Fund Type	No. of Funds
Donor-Advised Funds	63
Designated Funds	23
Field of Interest Funds	11
Scholarships	33
Non Profit (Agency Funds)	30
General Endowment (CFNCM)	11
Total	171

Grantmaking for 2013-2014

Grants made from the Foundation's General Endowments	\$1,560,057
Grants made from Donor-Advised, Designated, Scholarship & Other Funds	\$1,920,708
Total Grants	\$3,480,765

Grants Award Summary for 2013-2014 General Endowment Funds

	Grant
CASA Project, Inc.	\$14,910
Community Legal Aid, Inc.	\$ 9,940
L.U.K. Crisis Center, Inc.	\$16,898
Montachusett Interfaith Hospitality Network, Inc.	\$19,880
The Salvation Army, Athol Corps	\$ 3,979
The Salvation Army, Montachusett Corps	\$ 9,940
Sterling Council on Aging	\$ 2,982
Friends of Sholan Farms, Inc.	\$10,000
Groton Conservation Trust	\$14,000
Just Understand My Potential, Inc.,	\$ 2,000
Massachusetts Audubon Society, Inc.	\$ 4,000
Merrimack River Feline Rescue Society	\$10,000
Millers River Watershed Council, Inc.	\$ 9,250
The Trustees of Reservations	\$15,000
Athol Orange Community Television, Inc.	\$ 9,890
Seven Hills' Children's Aid & Family Services	\$ 5,528
Friends of the Templeton Elders	\$14,835
Fruitlands Museums, Inc.	\$ 4,958

House of Peace & Education, Inc.	\$ 9,890
Twin Cities Community Development Corporation	\$14,835
Kylee's Kare Kits for Kidz, Inc.	\$10,000
Our Father's Table	\$ 5,000
Mount Wachusett Community College	\$75,000
Nashoba Valley Healthcare Fund	
Ayer Fire Department	\$13,910
Boys & Girls Club of Lunenburg	\$ 7,500
Community Legal Aid, Inc.	\$15,000
Cooperative Elder Services	\$ 5,000
Indian Hill Music	\$ 8,500
Loaves & Fishes Food Pantry	\$20,000
L.U.K. Crisis Center, Inc.	\$18,000
MAB Community Services, Inc.	\$ 5,000
Our Father's House, Inc.	\$16,000
Pathways for Change, Inc.	\$10,000
Shirley Council on Aging	\$ 4,500
Teenage Anxiety & Depression Solutions	\$12,000
Westford Against Substance Abuse	\$ 5,000
Youth Opportunities Upheld, Inc.	\$ 7,500

TRUSTEES AND STAFF



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Ted Lapres, *Vice Chair*



Steven L. Stone, *Treasurer*



Thomas F. Bagley III, *Clerk*



**Philip M. Grzewinski, *President and
Recording Secretary***

Trustees

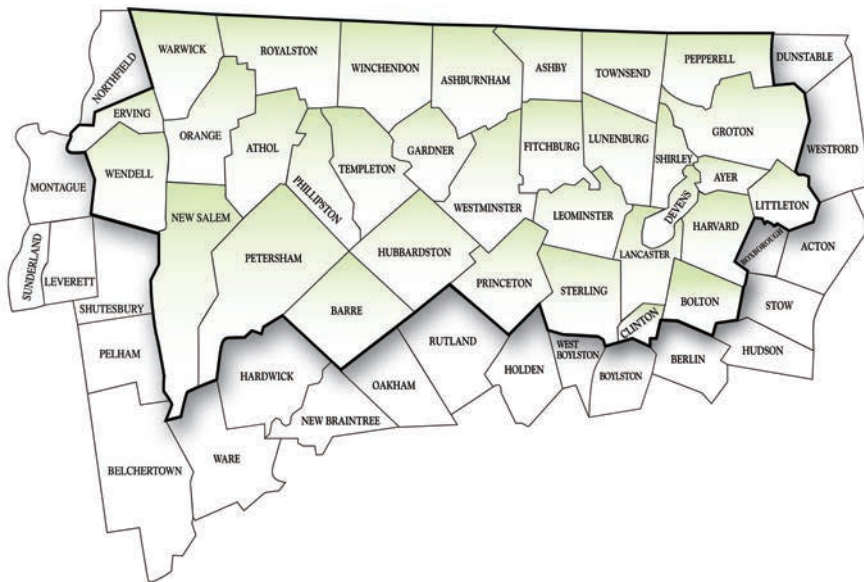
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Jay Drake
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Ashleigh Gelinas
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Henri Sans
Gary Shepherd
Albert Stone
Steven L. Stone

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Kathy Heintz, Grants Manager
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Marina Rahe, Director of Finance
Courtney Snyder, Administrative Assistant
Bill White, Marketing & Communications

The Foundation's mission is to *provide a means for donors to permanently endow charitable gifts, to increase and stabilize available funding to meet community needs and improve the quality of life.*

Serving the charitable interest of individuals, corporations, organizations and nonprofits in 33 communities.



- Ashburnham
- Ashby
- Athol
- Ayer
- Barre
- Bolton
- Clinton
- Devens
- Erving
- Fitchburg
- Gardner
- Groton
- Harvard
- Hubbardston
- Lancaster
- Leominster
- Littleton
- Lunenburg
- New Salem
- Orange
- Pepperell
- Petersham
- Phillipston
- Princeton
- Royalston
- Shirley
- Sterling
- Templeton
- Townsend
- Warwick
- Wendell
- Westminister
- Winchendon



Community Foundation

of North Central Massachusetts

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