

Improving the quality of life in the communities we serve through impactful, strategic philanthropy.

# Community Impact Report 2019



Funding • Leadership • Collaboration





**“Community foundations are a great place to engage the community and bring together business leaders, civic-minded folks, and community-based organizations.”**

**PRABAL CHAKRABATI, SENIOR VICE-PRESIDENT,  
BOSTON FEDERAL RESERVE**  
*(FROM 2019 CELEBRATE GIVING SPEECH)*



## Mission

To foster community growth and development through funding, leadership, and collaboration to transform the lives of the individuals and organizations we serve.

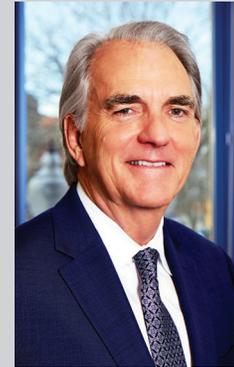
We fulfill this through:

- Grant-making to nonprofit organizations, high school scholarships, and strategic funding initiatives
- Working in partnership with our donors and other funders to achieve high impact philanthropy
- Serving as a convener and leader in the community where ideas are brought together and shared to leverage common agendas and resources

**\$20 million+**  
in grants given since 1997

*On Cover (clockwise): Merrimack Repertory Theatre's Young Company; House of Hope; Nashua River Watershed Assoc. Fishing Workshop; and Billerica Public Schools Food Market*

## Making Greater Lowell a better place to live, learn, work and play



For more than 20 years, Greater Lowell has trusted and supported GLCF to provide leadership, education and financial support through our vast donor network to effectively address the needs of the community.

In 2019, GLCF distributed \$2.5 million in grants and scholarships to the Greater Lowell community. We provide critical support to our regional nonprofit organizations through grants and to area students through academic scholarships. GLCF knows that no matter how global our society becomes, the Foundation sees everyday that real change begins at the local level.

The Foundation aims to serve donors, nonprofit organizations, and the local community as a whole. One of the unique functions of a community foundation is the ability to quickly assess and address community needs, so that charitable gifts are used most effectively.

Your support continues to create many opportunities to improve the lives of those who live, work and raise families in our community. Thank you!

Jay Linnehan  
President and CEO

# meet your philanthropic goals

Whether you give to an existing fund, establish a new one, or set up future philanthropy through planned giving, GLCF offers giving options that support a variety of key community needs and provide you with maximum tax benefits.



*Chelmsford Community Fund's George Dixon; CHS Santa Fund's Scot and Kelly Pratt; GLCF's Jay Linnehan; with Dr. Mark Gilchrist and John Chema - both of the Chelmsford Community Fund.*



## discretionary funds

gives the expert staff latitude to impact important community needs



## field of interest funds

donors recommend areas they want to support



## donor advised funds

donors recommend specific charities and causes they want to support



## agency funds

helps nonprofits with endowment-building to ensure long-term financial sustainability



## scholarship funds

awards funds to help aspiring students pursue higher education



## community funds

created with funds raised by a community to benefit that community



## 2019 By the Numbers

- \$3,218,603 gifts received from donors

- \$711,990 in scholarships were awarded to 293 students

- 382 endowed funds & \$42.9 million total assets

- \$1.7 million distributed to 219 nonprofits

# Homelessness



*House of Hope received a 2019 Help Alleviate Hunger and Homelessness in Massachusetts grant*



**“GLCF has been an invaluable partner in the effort to develop and implement an action plan to respond to homelessness in Lowell. Given the complexity of the issue, this effort has depended on the expertise and resources of organizations across every sector of the community. By contributing significant financial support to help enable the hiring of a renowned consultant to guide the process, GLCF has demonstrated a strong commitment to addressing the pervasive issue of homelessness in a way that is comprehensive and sustainable.”**

**- EILEEN DONOGHUE, LOWELL CITY MANAGER**

## 2019 Annual Meeting

### Community Foundation Annual Meeting Highlights Homelessness in the Community and Needs and Impact of Philanthropy

Barbara Poppe, the founder of Barbara Poppe and Associates and the former executive director of the United States Interagency Council on Homelessness gave the keynote address. Introduced by Eileen Donoghue, City Manager, City of Lowell, Ms. Poppe, a nationally recognized expert on homelessness and results-driven public-private partnerships was hopeful about solving homelessness in the downtown Lowell.

**“You’ve got many of the ingredients,” said Barbara Poppe. “The reality is you can solve homelessness, you just have to get yourself organized to do that.”**

Additionally, the event showcased six recipients of the 2019 *Help Alleviate Hunger and Homelessness in Massachusetts* grant and their important work in the community: House of Hope, Life Connection Center, Lowell Transitional Living Center, Mill City Grows, New England Dairy & Food Council and The Open Pantry of Greater Lowell. This generous one-time capital grant was made possible from an anonymous donor that partnered with the GLCF to distribute \$90,000 in grants awarded to 11 area nonprofit organizations that are battling hunger and homelessness in the community.



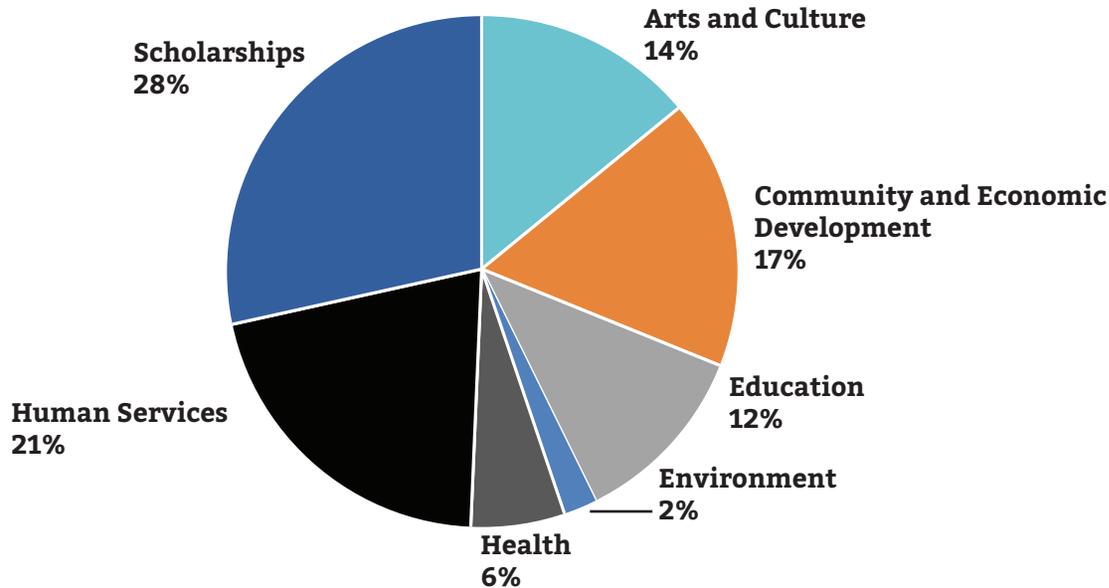
*The Greater Lowell Community Foundation's 2019 Annual Meeting: Homelessness and Hope. Pictured, from left, GLCF Board Chair Chet Szablak, City of Lowell City Manager Eileen Donoghue, Barbara Poppe, event keynote and nationally recognized expert on homelessness with GLCF President and CEO Jay Linnehan.*

**\$144,000+**  
to combat homelessness

# Investing in Community

**2019 Grant Distributions:** GLCF focuses on impactful, strategic granting by having an in-depth working knowledge of the community, collaborating with organizations who serve it, and the priorities of the Foundation's fund holders and donors.

By percentage, the Foundation's total of \$2.5 million in grants and scholarships were awarded as follows in 2019:



## Power of Partnerships

### Community Partners open Children's Reading Resources at Lowell Family Shelters

GLCF identified a need for reading resources as many at-risk children from families who are living in transitional living facilities do not always have access to books. Project partners included **On the Move Inc.** who supplied the books with funding from GLCF, bookcases were provided by **CTI YouthBuild** and **Community Teamwork** provided the resource site selection and management. More than 500 books, selected from summer reading recommendations, were purchased for the children at four local family shelter sites who will be able to keep their selected books.

## 2019 Discretionary Grants

### Social Education Grants

- International Institute of New England: Citizenship Education and Application Services (CEAS)
- Lowell Parks and Conservation Trust: Youth Climate Action
- Merrimack Valley Housing Partnership: Project Genesis
- Lowell Middlesex Academy Charter School: Youth Advocating for Reduced Gun Violence
- Mill City Grows: Food Justice Squad
- Playworks New England: TeamUp Program in Lowell
- Project LEARN, Inc.: Portrait of a Graduate

### Children's Services Grant

- Aaron's Presents: Empowering Youth Givers in Lowell
- Budget Buddies: Girl's LIFE (Learning Independence through Financial Education) at Justice Resource Institute
- On The Move, Inc.: Personalized Book Donations for Lowell Elementary Students
- Raising A Reader Massachusetts: Raising A Reader Lowell

### Leclair Elder Services Grant

- Gaining Ground, Inc.: Growing Fresh Produce for Hunger Relief with Community Volunteers
- Lowell Council on Aging: Khmer Senior Outreach
- Massachusetts Alliance of Portuguese Speakers (MAPS): Lowell Immigrant & Elder Services Program
- Merrimack Valley Food Bank: Mobile Pantry
- Power of Flowers Project (Tewksbury): Individual Bouquet Deliveries and Flower Therapy Workshops
- Project Citizenship: Citizenship for Elders in Greater Lowell
- The Open Pantry of Greater Lowell: Food pantry

### Water Resources Initiative Grant

- Nashua River Watershed Association
- Northeast Legal Aid, Inc.
- OARS, Inc. (Concord)

# GLCF communities served

GLCF focuses resources and services on nonprofits, students, and donors in 20 cities/towns: Ashby, Ayer, Bedford, Billerica, Burlington, Carlisle, Chelmsford, Concord, Dracut, Dunstable, Groton, Lowell, Littleton, Pepperell, Shirley, Tewksbury, Townsend, Tyngsboro, Westford and Wilmington



## 1. ASHBY FIRE DEPARTMENT CARBON MONOXIDE MONITOR FOR ADULTS AND PEDIATRICS

Ashby Fire received grant funding for a SPCO detection device that provide the ability to assess the level of carbon monoxide in a patient's blood as part of the Nashoba Valley Health Care Fund. Carbon monoxide poisoning can be fatal to anyone - children, pregnant women, and older adults are particularly vulnerable to carbon monoxide poisoning.



## 2. SEVEN HILLS FAMILY SERVICES THERAPEUTIC WHISPERGILDE SWING IN GROTON

Seven Hills received a grant to purchase a WhisperGilde Swing for its group residential home, supporting five adults with intellectual and developmental disabilities - all of whom are non-ambulatory. This wheelchair accessible glider swing was designed to allow for patient and family socialization.



## 3. STONY BROOK MIDDLE SCHOOL STUDENT SPACEFLIGHT EXPERIMENTS PROGRAM (SSEP)

GLCF and the Westford Community Fund were Underwriting Partners for a national model STEM education program that Stony Brook Middle School participated in which engaged over 300 students. Teams of students competed to have their experiment chosen to go aboard the International Space Station.



**4. ASTHMA SPACERS FOR SCHOOL KIDS**  
GREATER LOWELL HEALTH ALLIANCE GRANT

GLCF received a \$20,000 grant from the Greater Lowell Health Alliance for the Asthma Spacers for School Kids program. In partnership with Respiratory Delivery Systems Inc. in Chelmsford, the grant provided almost 2400 asthma spacer devices at no cost to students in Lowell Public and area schools, free of charge.



**5. BILLERICA PUBLIC SCHOOLS FOOD MARKET**  
GRANT TO PURCHASE CRATES AND CARTS

GLCF awarded a grant to the New England Dairy & Food Council as part of the 2019 Help Alleviate Hunger and Homelessness in Massachusetts Grant to support the Billerica Public Schools (BPS) Food Market, which is one of nine school-based food pantries in high-need.



**6. GAINING GROUND**  
FOR GROWING FRESH PRODUCE FOR HUNGER RELIEF WITH COMMUNITY VOLUNTEERS

Gaining Ground in Concord grows organic produce for hunger relief with help from volunteers of all ages and abilities, who work and learn in their fields. GLCF, along with Community Foundation of North Central Mass., provided a grant to Gaining Ground from the Nashoba Valley Health Care Fund.



“Enterprise Bank is a longtime supporter of the Greater Lowell Community Foundation and communities where we live and work. GLCF’s unwavering commitment to foster community growth and development is paramount. At Enterprise Bank we value the community partnership we have with GLCF.”

- JACK CLANCY, CEO, ENTERPRISE BANK



GLCF announced the establishment of the Hidden Battles Endowment Fund, a new field of interest fund supports programs to help preserve the healthy minds of military veterans and first responders with the Hidden Battles team. From l to r: Leslie Cregg-Hyder, Cregg Hyder, GLCF’s Jay Linnehan, Scott Hyder and Chris Hurst.

# community investment

## Business & Organization Donors

- 2A Tactical, LLC
- A.I.M. Mutual Insurance Company
- Acton Professional Firefighters Local 1904
- Adie Conway, Inc. / Dunkin Donuts
- Adobe Systems Matching Gifts
- Airbus Group, Inc. Matching Gift
- All Metals Industries, Inc.
- All Sports Heroes
- Amazon.Com
- American Legion Dirty Water Cambridge
- Law Office of Annis & Mulligan
- Anton's Cleaners, Inc.
- Athenian Corner Restaurant & Lounge, Inc.
- Mary J. Bacigalupo Community Fund
- Badges for Braydon
- Bailey's Bar and Grille, LLC
- Barr Foundation
- Battles Foundation, Inc.
- Better Contracting, LLC
- Billerica-BFIT60, LLC
- Boisvert Fund
- Bon Marche Trust
- Boston Physical Therapy & Wellness
- Bricklayers and Allied Craftsmen Union Local No. 3
- Building Blocks Pre-School
- Cambodian Mutual Assistance Association of Greater Lowell, Inc.
- Center for Hope and Healing, Inc.
- Centralville Baseball League, Inc.
- Marc Chandonnet Plumbing & Heating, LLC
- Chelmsford Business Association, Inc.
- Chelmsford Pediatrics
- Citrin Cooperman & Company, LLP
- City of Lowell
- City of Lowell Women's Golf Tournament, Inc.
- Cobblestones Restaurant
- Law Office of Colonna & Doyle
- Community Teamwork, Inc.
- Congregation of the Sisters of St. Joseph of Boston
- Connell & Connell Attorneys
- Corporation for the Celebration of Jack Kerouac in Lowell
- Cultural Organization of Lowell
- Custom MMC Design Services, Inc.
- Dabbs Lock
- Deluxe Corporation Foundation Matching Gifts Program
- Demoulas Foundation
- Desjardins, LLC
- Dick Insurance Agency, Inc.
- Joseph P. Donahue Charitable Foundation Trust
- Nancy L. Donahue Fund
- Nancy L. Donahue Fund in Memory of Richard K. Donahue Sr.
- Richard K. and Nancy L. Donahue Charitable Foundation Trust
- Duke Family Fund
- Emerson Hospital
- Empire Regency Hospitality, LLC
- Enterprise Bank
- ERA Key Charitable Organization, Inc.
- Aubert J. Fay Charitable Fund
- Fay McCabe Funeral Home
- Fenton Family Foundation
- Fiduciary Trust Matching Gifts
- First Congregational Church
- First Congregational Society
- First Parish in Bedford
- Fish Family Foundation
- Fournier Plumbing and Heating
- GE Foundation - Mr. and Mrs. Michael P. Sousa
- General Woodworking
- Mark G. Gilchrist MD, LLC
- Girls, Inc. of Greater Lowell
- Committee to Elect Tom Golden
- Greater Lowell Bar Association
- Greater Lowell Health Alliance
- Greater Lowell Regional Vocational Technical School District
- Greater Washington Community Foundation
- Mary E. Harrington Memorial Fund
- John W. Henry Family Foundation
- Heritage Summer Nights, Inc.
- Hidden Battles Endowment
- Horizon Interiors, LLC
- I.B.E.W Local 2321
- Iceberg Seafood Co., Inc.
- Institute for Nonprofit Practice
- Jamesco Development, Inc.
- JNB & Associates
- Kainos Partners Inc. dba Progressive Pilgrimage
- KBK Sports, LLC
- Keller Williams Realty Merrimack Valley
- The Kerfuffle Foundation
- Kronos, Inc.
- LaBella Hair, Inc.
- Laborers' International Union of N. America Local # 429
- Charlotte and Michel LaPierre Charitable Fund
- Law Office of Brian W. Leahey, P.C.
- Suellen O'Hare Lebosquet Rev. Trust
- Lemieux Construction
- LHS Class of 1957
- LHS Distinguished Alumni
- L'Hussier Insurance Agency
- Lighthouse Networks, Inc. dba Computers Without Fear
- LMP-Lowell Realty, LLC
- Local 2321 Benevolent Fund, Inc.
- Long Term Care Partners, LLC
- Longfellow Primary Care, PC
- Lowell High School
- Lowell Housing Authority
- Lowell Kiwanis Foundation, Inc.
- Lowell Plan, Inc.
- Lowell Police Superior Officers Association
- Lowell Publishing Co.
- Luz Granite Corp
- Henry and Winifred Lyons Foundation
- Law Office of Daniel J. Mansur
- Massachusetts Alliance of Portuguese Speakers
- Massachusetts Voter Education Network
- McHugh Law
- MEC Electrical Contractors, Inc.
- MEC Technologies, Inc.
- Meerkat Technology, Inc.
- Megan House Foundation, Inc.
- Melrose Glass Co., Inc.
- Committee to Elect Rita M. Mercier
- Merrimack Repertory Theatre, Inc.
- Merrimack Valley Food Bank, Inc.
- Merrimack Valley Housing Partnership, Inc.
- Merrimack Valley Magazine
- Michael G. Conway Insurance Agency, Inc.
- K Miliano, LLC
- Monatiquot School Kindergarten Center
- Moonan Family Fund
- Morse-Bayliss Funeral Home
- Committee to Elect Kevin J. Murphy
- Henry C. & Audrienne Murray Foundation
- NAM Knights M/C White MT Chapter
- New England G.O.A.L
- The Nooril-Iman Charitable Foundation, Inc.
- Ocean City Charitable Lead
- Ogonowski New Farm Families Endowment Fund
- OneHope
- O'Neil Cinemas
- Owl Stamp Visual Solutions
- Margaret A. Palm Revocable Trust
- Theodore Edson Parker Foundation
- Pawtucketville Memorial Elementary School PTO Scholarship
- Peace First, Inc.
- Pergola Communications, LLC
- PKMAX, LLC
- Specialist Matthew Pollini Memorial Fund
- Precision Surgical Specialist of Lowell
- PrideSTAR EMS, Inc.
- Project LEARN, Inc.
- Quirk Auto Dealership
- R.J.A. Realty Trust
- Rogers Hall Corporation
- Mark and Elisia Saab Family Fund
- Law Office of Jarrett Scarpaci
- Screenprint/Dow A World of Printing Technologies
- Shannon, Cullen & Associates, LLC
- Smith's Barber Shop
- Sompal, Inc./Store 38
- Souhegan Septic Tank Service, LLC
- Peter S. Stamas Fund
- St. Jude Fund of Lowell MA
- Stellar Web Studios
- Joseph W. Stillwell Institute Foundation, Inc.
- Studio 26 Associates
- Suffolk Cares
- Sullivan Middle School PTO
- Teamsters Local Union No. 25
- Tewksbury Firefighters Local 1647
- Committee to Elect Jeffrey Thomas
- TMI Property Management & Development
- Top of the Hill Fund
- Niki Tsongas Committee
- Brett A. Tully Scholarship Fund
- Turner's Seafood Corp.
- U.S. Trust, Bank of America Private Wealth Management
- UBC & JA Local 336
- Union Sales Presentation Coaching, LLC
- Dr. An Wang Middle School
- Team Mickey Ward Charities, Inc.
- Wegmans Food Markets, Inc.
- Westford Family Medicine
- Whole Foods Market Westford
- Women Accelerators, Inc.
- Z R Rourke Real Estate, LLC

## 2019 Statement of Financial Position

### ASSETS

Cash and investments	43,026,770
Accounts/Pledges Receivable	90,901
Other assets - net	20,791
<b>Total assets</b>	<b>43,138,462</b>

### LIABILITIES

Accounts payable / accrued expenses	70,704
Grants payable	5,225
Charitable gift annuities	1,897
Fiscal agent + agency endowment funds	5,599,252
<b>Total liabilities</b>	<b>5,677,078</b>

### NET ASSETS

Total net assets	37,461,384
<b>Total liabilities and net assets</b>	<b>43,138,462</b>

## 2019 Statement of Activities

### SUPPORT AND REVENUE

Contributions, grants and gifts	2,351,971
Investment Income	6,700,881
Donated goods and services and Other	15,898
<b>Total support and revenue</b>	<b>9,068,750</b>

### EXPENSES

Program Services	2,267,199
Fundraising	176,821
General and administrative	237,011
<b>Total expenses</b>	<b>2,681,031</b>

**TOTAL CHANGE IN NET ASSETS** 6,387,719

**NET ASSETS AT BEGINNING OF YEAR** 31,073,741

**NET ASSETS AT END OF YEAR** 37,461,460

## 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.

### GLCF Endowed Funds Return (through 12/31/19)

- 1 Yr. +22.68%
- 3 Yr. +12.09%
- 5 Yr. +7.97%

## Foundation Donors

The generous support of private foundations is essential to furthering our work in the community.

### We appreciatively acknowledge our founding Foundations:

- The Theodore Edson Parker Foundation (Moses Greeley Parker Foundation and Mary Greeley Parker Morrison Foundation) for their initial and continued support.
- Jessie B. Cox Charitable Trust Fund
- Massachusetts Environmental Trust



*GLCF Board Members Yun-Ju Choi and Brian Stafford with Jay Linnehan presented St. Paul's Soup Kitchen founders Rose and Walter Bronk with a donation to support their mission of feeding homeless and disadvantaged people in the community.*

# Women Working Wonders Fund



“Philanthropy is the investment in society, so you should approach the creation of a fund as you would any other venture. It is an investment of your money, not in a company, but in your community.”

- CARRIE MEIKLE, WWW TRUSTEE + GLCF DONOR  
(PICTURED WITH DAUGHTER GRACE MEIKLE)

## 15 Years of History

### Women Working Wonders Fund Celebrates an Anniversary



More than 120 guests gathered at Vesper Country Club in Tyngsboro on April 30th to celebrate the 15th anniversary of the Women Working Wonders (WWW) Fund and applaud past successes, present good fortune, and the future of women in philanthropy.

The event raised \$246,015 to surpass an endowment campaign goal of \$1 million to ensure the future success of WWW and provide the means by which women can engage actively and meaningfully in the community. Annual grants are awarded to organizations supporting women and girls in the Greater Lowell area.

WWW Fund provides annual grants in three key areas:

- assist women in transition
- provide leadership development
- contribute to the beautification of the environment

Founded in 2004 by a small group of women coming together to form a collective giving organization that focused on women’s issues, the fund has made 41 grants of \$5,000 to organizations supporting women and girls in the Greater Lowell area.

For more information on the Women Working Wonders Fund, visit [womenworkingwondersfund.com](http://womenworkingwondersfund.com).



*WWW Planning Committee and Trustees at the 15th Anniversary Celebration*



*The WWW's signature fundraising event, Power of the Purse*

**\$200,000+**  
in grants given since 2004

# community investment

## Individual Donors

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\* Listed are donors who contributed at a significant GLCF giving level. For a complete list of 2019 individual donors, visit: <https://www.glcfoundation.org/2020/06/15/2019-donors/>



**“Custom MMIC’s Women In Engineering Scholarship would not be possible without the assistance of The Greater**

**Lowell Community Foundation. This strategic partnership allows us to celebrate the accomplishments and focus on the future potential of these talented and exceptional young women rather than the logistics of running a separate foundation. We encourage other small companies to follow in this model and give back to the local community.”**

**- PAUL BLOUNT, PRESIDENT, CUSTOM MMIC**



*Custom MMIC’s 2019 “Women in Engineering” Scholarship recipients: Lina Abu-Absi of Groton; Ananya Srinivasa-Gopalan of Chelmsford; and Lillian Geller of Westford. The scholarship was launched in 2018 with the partnership of GLCF which provides the logistical support for the scholarship program.*

GLCF has turned charitable visions into meaningful change for hundreds of donors

Partners in Philanthropy



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Confirmed in Compliance with  
National Standards for  
U.S. Community Foundations



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Lowell Spinners  
Lowell Sun  
Lowell Sun Charities, Inc.  
Madison Security Group, Inc.  
Middlesex Community College  
Mill City Environmental Corporation  
Mills42 Federal Credit Union  
Moors and Cabot, Inc.  
MV Magazine  
N.E. Heritage Properties, Inc.  
NetScout Systems Inc.  
Mr. Kamlesh Patel  
People's United Bank  
Princeton Properties  
Francis Provencher Ins. Agency  
RBC Wealth Management  
Roark Law Office, P.C.  
RoCo Tech Services, LLC  
Salem Five Bank  
Silva Brothers Investments, Inc.  
Soucy Industries, Inc.  
S & R Corporation  
Trinity E.M.S., Inc.  
UMass Lowell  
Votze Butler Charitable  
Washington Savings Bank  
Drew Weber Charitable Fund  
Joann Weber Charitable Fund  
WinnCompanies