

# Welcome Message From the President and Executive Director

We are delighted to present the Greater Lowell Community Foundation's annual 2003-2004 report to the community – *Innovation, Involvement, Impact*. We are proud to be a leader in building permanent charitable resources that create quality in community life. Please read the report and take the measure of this remarkable community resource.

Our annual retrospective serves several purposes, foremost of which is to demonstrate how individuals, families and institutions in our community have used the Community Foundation to advance personal and community values. The report is also an invitation for you to consider creating your own community legacy that reflects your vision, values and commitments.

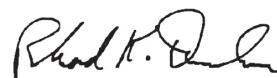
While our region boasts many positive developments, all of us know our communities and residents also face momentous challenges.

Our vision for our communities and our response to some of its challenges are unique and effective, in large part because they employ charitable capital in a permanent way. Annual distributions from these enduring capital resources help organizations in our communities tackle difficult issues and respond to opportunities that improve the quality of life.

This extraordinary capacity within our community – a capacity created by hundreds of people and organizations involved in a common commitment to better our lives now and forever – empowers the Greater Lowell Community Foundation to effect positive change and sustain important values and institutions.

Thank you for your support and good will. We look forward to working with you as a philanthropic partner in the future. Give us a call.

Sincerely,



Richard K. Donahue  
President



David Kronberg  
Executive Director

## Board of Directors of the Greater Lowell Community Foundation



Kevin Harkins Photo



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# What is the Greater Lowell Community Foundation

**F**ounded in 1997, the Greater Lowell Community Foundation is a nonprofit, community corporation created by and for the people of the Greater Lowell area, spanning both the Nashoba and Merrimack Valleys in northern Middlesex County, Massachusetts. The municipalities in our service area are Ashby, Ayer, Bedford, Billerica, Burlington, Carlisle, Chelmsford, Concord, Dracut, Dunstable, Groton, Littleton, Lowell, Pepperell, Shirley, Tewksbury, Townsend, Tyngsboro, Westford, and Wilmington.

The Greater Lowell Community Foundation provides a simple, powerful, and highly personal approach to giving. There are three special features of the Community Foundation that enable donors to become architects of our community's future:

**One: Personalized Service.** We make giving easy, flexible, and effective, accepting a wide variety of gifts and providing donors the greatest flexibility. You can contribute cash, stocks, property, and bequests. You may establish an Unrestricted, Field of Interest, Designated, Donor-Advised or Scholarship Fund in your name or in the name of a loved one. Your gift will gain maximum tax advantage.

**Two: Local Expertise.** Our professional staff has in-depth understanding of the issues, opportunities, and resources that shape our community. They monitor all areas of community need, including human services, education, the environment, health care, the arts, and economic development. We can help you learn more about local agencies and programs that make a difference in areas you care about most.

**Three: Community Leadership.** We invest in the long term and bring people and organizations together, convening diverse voices to address local issues and opportunities. Our business is building community.

Each of these capacities translates into our mission to enrich community capital, empower nonprofit organizations to meet vital community needs, and strengthen our connections with each other to address current concerns.

## Other Qualities of the Greater Lowell Community Foundation

- We are a *local organization* with deep roots in the community.
- Our *Donor-Advised and Designated Funds* help people invest in the causes they care about most.
- We accept a wide *variety of assets* and can facilitate even the most complex forms of giving.
- We partner with *professional advisors* to create highly effective approaches to charitable giving.
- We offer maximum *tax advantage* under state and federal law.
- We *multiply the impact* of gift dollars by pooling them with other gifts and grants.
- We *build endowment funds* that benefit the community forever and help create personal legacies.



Representatives of nonprofit organizations that were awarded grants to strengthen their organizational capacity building and for water resource protection projects at Philanthropy Day 2004. See page 11 for more details on the grants.

# Innovation, Involvement, Impact: Leadership in Building Community

Community foundations throughout the nation distinguish themselves as community leaders by achieving three core missions:

- To build and manage permanent endowments and other charitable funds
- To administer distributions and competitive grant-making programs from these funds
- To convene individuals and institutions to address important issues through special programs and conferences

While the Greater Lowell Community Foundation is young and modest in size, its innovations have local community and national impact. In each area described below, the Foundation has launched initiatives, created programs, and involved remarkable people and institutions as it expanded and deepened its impact.

## **Democratizing Philanthropy: Creating Legacies Accessible to All**

While all community foundations share these essential purposes, every community foundation defines itself differently in response to its own demographics, community needs and opportunities, history, personalities and powers in its region. As a rapidly maturing foundation, the Greater Lowell Community Foundation (GLCF) engages all kinds of people, not just those whose financial means easily enable them to establish charitable legacies to support community life.

The GLCF distinguished itself early because of its accessibility and its commitment to work with anyone who wants to become a philanthropic leader. A permanent fund can be established with as little as \$1,000. Distributions from the new fund commence when the fund reaches \$5,000 in value.

As of November 2004, the Greater Lowell Community Foundation has built a \$9.5 million portfolio composed of 168 endowment funds. It has done so by helping individuals, families, nonprofit organizations and corporations achieve their own philanthropic goals and by working with these individuals and institutions to gain knowledge of issues most important to them. The GLCF encourages its partners to become strategic philanthropists by connecting them with organiza-

tions, resources and other donors to create resourceful investments and imaginative solutions.

Since 1998, the Foundation and its donors have awarded more than \$2,000,000 in scholarships to high school students, grants to strengthen the organizational capacity of nonprofit groups, distributions from funds established exclusively for or by nonprofit agencies, and donor advised gifts to charitable organizations both locally and across the country.

## **The Lowell High School Campaign for Educational Excellence**

Most public high schools in the country are facing unprecedented challenges in raising private dollars to retrieve what they have lost in public funding cutbacks or to raise new funds to provide scholarships for graduating seniors. Unlike private schools, public high schools often lack the tools, human resources and other capacities to make the most of funding opportunities, such as major gifts, multi-year scholarship endowment campaigns and planned giving programs.

Lowell High School has developed that capacity through a partnership with the Community Foundation that serves as a model for fund development for public school systems throughout the region. Since its inception the Foundation has worked closely with Lowell High School in creating new scholarship funds and managing its annual pass-through scholarships. Over the years the Foundation has assisted the High School's scholarship and endowment development plans, a "back-office" capacity that only private preparatory schools have been able to attain at much greater cost.

A five-year, \$5 million scholarship and endowment campaign, *The Lowell High School Campaign for Educational Excellence*, commenced last year. To date, over \$1 million has been raised. A \$500,000 challenge grant from the McCallum Family Foundation is near achievement, which will generate an additional grant of \$500,000 over five years. The *Campaign* has its office at the Community Foundation, where it can make use of the Foundation's technical resources and staff.







Lowell High School establishes an endowment.

Since the inception of the *Campaign*, permanent funds for Latino, African American and Portuguese American students have been established. The new \$200,000 Portuguese American Scholarship Fund was established as part of an effort to promote an appreciation of the

cultural heritage of this important and sizeable population in Lowell. The Walter Nelson Scholarship Fund and the Riddick Family Scholarship Fund were created from proceeds generated from two golf tournaments that attracted hundreds of alumni who celebrated the legacies of two Lowell High School legends. All told, since the *Campaign* was launched 28 funds have been created in memory of loved ones who graduated from Lowell High and other schools. A full list and description of all 82 Lowell High School funds appear on pages 22-25.

### Substance Abuse Diversion Initiative

In the past year, the Substance Abuse Diversion Initiative of Lowell (SADIL) has refined its priorities, philosophy, and its treatment protocol, all in response to the real life challenges discerned by major stakeholders addressing the burgeoning problem of substance abuse among young people.

Through our collaboration with the Lowell Police Department and Lowell House, SADIL is developing an on-site clinical intervention service at the Lowell Police Headquarters to provide an initial assessment of any individual who has been arrested or detained. The evaluation will occur after the arrestee is processed in the booking area. Peter MacNeill, SADIL's clinician will be available during the days and hours when the highest percentage of substance abuse offenses occur based on data provided by the Lowell Police Department's crime analysis unit. The clinician's office will be located near the point of entrance into the criminal justice facility, so that clinical intervention is seen as a visible and achievable option. The SADIL clinician will be provided a police scanner to monitor radio calls and be alerted immediately that services are needed.

Initially, every person brought to the station will be offered the clinician's services, including short-term counseling, referrals or additional services, to be determined on a case-by-case basis. Each person who chooses to participate in the SADIL program will be provided with a basic treatment plan: phone calls and, if feasible, home visits. SADIL has three primary goals: 1) to reduce substance abuse and related behaviors among program participants; 2) to strengthen family systems; and 3) to reduce recidivism among the target population.

SADIL's staff has been meeting and creating a network of partnerships with community and social service agencies throughout the Greater Lowell area. Working together, this network is exploring and utilizing every avenue that can be beneficial to securing treatment for SADIL clients. As the program evolves, SADIL hopes to continue to network with treatment providers, probation and parole officers and employment agencies, and to share information and enhance the participant's chances for success. These partnerships will provide SADIL with the opportunity to treat people more effectively, resulting in reduced substance abuse and safer and more stable communities.

### Ogonowski New Farm Families Project and Harvest Fair

Capt. John A. Ogonowski, the pilot of American Airlines Flight 11 on September 11, 2001, is remembered across the nation. He dedicated his life and offered his land to help immigrants create a future for themselves and their families through their proud and honorable work as farmers. With his wife Peg and the extended Ogonowski family, GLCF is endowing a living memorial that celebrates John's commitment to natural resource protection, opportunities for immigrants to make a life on the land, and the values that he personified as a good American in a rapidly changing world.

In 2003, the GLCF joined with the Dracut Land Trust, Community Teamwork, Inc. and the Tufts University New Entry Sustainable Farming Project to present a harvest fair fundraising event that attracted hundreds of people to John and Peg's land to view educational exhibits and share the harvest grown by participating farmers. Proceeds supported the Tufts New Entry Project at the Ogonowski farm; the Dracut Land Trust and its protection of Dracut's rapidly diminishing farmland reserve; and the GLCF's long-term commitment to sustain this New Farm Families Project through a permanently endowed fund.



## **Reinsured Charitable Gift Annuities: Creating New Funding Resources for Individuals and Nonprofits**

Gift annuities have a 160-year track record, are easy to understand and are the most popular deferred gift strategy, benefiting hundreds of nonprofit institutions and many thousands of people across the country. Gift annuities provide charitably minded donors substantially higher levels of lifetime income and tax benefits than certificate of deposits, US Treasury investments or money market instruments. Moreover, a substantial portion of the gift annuity donation benefits charitable organizations after the death of the donor/annuitant(s).

Most nonprofit organizations in the Foundation's service area do not have the capacity or financial resources to offer and guarantee charitable gift annuities. In addition, nonprofits cannot realize an immediate advantage because gift annuities benefit nonprofit organizations only after the annuitant dies. In response to these challenges, the Foundation is offering an innovative response to address the needs of nonprofits, many of which are facing some of the most difficult trials in their history.

By "reinsuring" the gift annuity, the GLCF secures lifetime payments for the donor/annuitant through a single premium annuity contract with only the most highly rated insurance companies. As a result, the charitable gift portion no longer must be deferred, and is thus made available by the Foundation as a new funding opportunity for nonprofits, religious institutions, and other charitable organizations.

Much of the funds can be made available immediately, while a portion is reserved as a permanent endowment, thereby providing both immediate and long-term support for local charitable organizations. Donors who create a gift annuity may determine one or more charitable beneficiaries.

Gift annuities offer fixed income payments to individuals for life at a time when the Social Security Trust Fund is not seen as fulfilling its original promise for older Americans. As such, gift annuities can be viewed as a privatized and self-directed supplement to Social Security that also benefits community institutions.

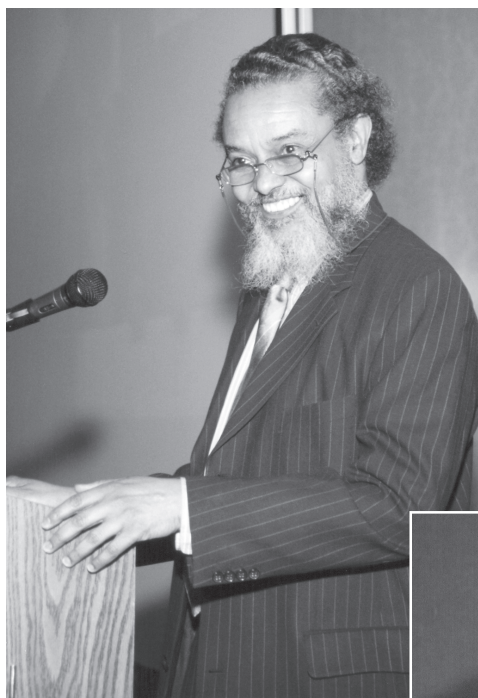
By creating an immediately usable source of funding that can benefit both charitable organizations and their individual supporters; the Founda-

tion hopes to inform individuals and professionals throughout the broader region about these sophisticated funding strategies.

## **Philanthropy Day 2003 and 2004**

Since the first Philanthropy Day event in November 1997, this annual conference has emerged as the most important networking and convening event for nonprofits, philanthropists, foundation representatives, community volunteers, and others interested in civic engagement, nonprofit management, and resource development issues in our immediate communities.

Two Philanthropy Day conferences (the Seventh and Eighth Philanthropy Days) took place since the publication of our last report to the Community.



**State Representative Byron Rushing delivered the 2003 Philanthropy Day keynote address on *Recovering the Common: The Politics and Economics of Sharing*.**



**Philanthropist Ellen Remmer addressed the 2004 Philanthropy Day audience on her recent monograph *Raising Children with Philanthropic Values*.**



Paul Scalera Photo

**Jerry Beck, Director of the Revolving Museum discusses Lowell's downtown arts and economic development at Philanthropy Day 2004. Standing behind are from left: John Conley and Sarann Nuon from the Jericho Road Project, Joan Chun who volunteered with the Revolving Museum, and Lou Brady, COO of the Lowell Community Health Center and Master of Ceremonies for the event.**

The Seventh Annual Philanthropy Day, "People Partnering for Progress," May 29, 2003 was dedicated to Peter S. Stamas, one of the founding Directors of the Community Foundation and its first Treasurer, and featured an eloquent keynote address by State Representative Byron Rushing on "Recovering the Common: the Politics and Economics of Sharing." The first panel discussions centered on successful partnerships and collaborations between and among nonprofits, public agencies, churches, and the populations they serve. Brief case studies featured Girls Inc., the Lowell Council on Aging, Eliot Church and the Cameroonians of Lowell, and the United Teen Equality Center. Carol Duncan, then Lowell Mayor Rita Mercier, Rev. David Malone and Fru Nkimbeng and Greg Croteau were principal presenters.

The second set of presentations, featuring personal stories of philanthropy and community service, introduced Mark Bernard's heroic marathon race that raised funds for his father's memorial fund at the Community Foundation. Mark's father, David, died from injuries sustained from falling debris as he entered the World Trade Center on September 11. Elizabeth Chaves described how the Massachusetts Alliance of Portuguese Speakers created their endowment fund; Laura Shantler and Keith Bennett described a new leadership-training program at the Greater Lowell Family YMCA; and Eugenia Ostis Funaro celebrated Peter S. Stamas's extraordinary life that was committed to public education and community service.

Eighteen nonprofit organizations received organizational capacity and water resources grants. Philanthropy Day also included networking sessions, twenty-four exhibits prepared by past grantees, and roundtable meetings on partnering

with youth, foundations, corporations, and service organizations.

The Eighth Annual Philanthropy Day, "Bridging Innovations for Change with Legacies for the Future," May 26, 2004, was dedicated to John E. Leggat, the Foundation's Vice President, and Susan E. Leggat, events coordinator for the Lowell National Historical Park and the Lowell Folk Festival, both of whom died earlier in the year. Ellen Remmer, vice president of The Philanthropic Initiative and a board member of the Remmer Family Foundation, was the Keynote speaker, addressing the issue of raising children with philanthropic values.

The "Innovations for Change" panel featured entertaining and fast-paced presentations by Jerry Beck of the Revolving Museum; Dan Holin, Sarann Nuon, and John Conley from the Jericho Road Project, which connects expert volunteers from Concord with Lowell nonprofits; and Karla Brooks Baehr, Lowell Superintendent of Schools, and Janet Anderson from Edvestors, a Boston-based philanthropic effort that enlists new donors to support innovative curricular reform projects like the Lowell School Department's Math Brigade.

In the second set of presentations, "Legacies for the Future," William Traynor showcased Anita Moeller and the creation of the Acre Family Day Care Endowment Fund, named in her honor; Pat Crane introduced the new Women Working Wonders Fund, the region's first permanent fund to address issues and opportunities for women and girls; and Cary Renault described insights gained in his efforts fighting for transportation accessibility on behalf of disabled people in the region.

Twenty-four nonprofit organizations received organizational capacity and water resources grants. Philanthropy Day also included networking sessions and thirty exhibits prepared by past grantees.

### **Third and Fourth Annual Volunteer Philanthropist of the Year Awards**

Even though money is always needed, the commitment of volunteers is equally valuable, for they instill all charitable work with a personal determination and inspiration. From governing charitable and civic corporation to putting in the elbow grease and attending to the details, volunteers keep organizations and programs running. Volunteers are the driving force for many of the accomplish-



ments achieved in our communities, and they deserve all the accolades we can give them.

On Philanthropy Day 2003 and 2004, from among the thousands of volunteers in the region, the Community Foundation recognized an outstanding adult and a youth leader. Shirley Alejandro and Roeun Chan in 2003, and Therese O'Connor and Joan Chun in 2004 received the Volunteer Philanthropist of the Year Award. Each was awarded \$1,000 to give to a nonprofit organization of his/her choice. The following organizations received grants from the volunteers: Lowell Telecommunications Corporation, Big Brothers Big Sisters of Greater Lowell, The Whistler House Museum of Art and United Teen Equality Center.

**Shirley Alejandro**, CEO of Excelsius Motivational Associates has been an active volunteer since moving to Lowell in 1996. Ms. Alejandro is a member of the City of Lowell's Enterprise Community Governance Board, where she has been enthusiastic in helping to foster a youth jobs network, a literacy campaign, a voter registration drive, the Healthy Summer project, and the successful All America City competition. Her dedication to the community is evident in her service to Latinos in Action, Saint Margaret's School, and Lowell Catholic High School where she coached the soccer team to a championship year.

At the time of the award, Shirley was the president of Lowell Telecommunications Corporation, where she not only led the organization but also volunteered to translate public service announcements into Spanish and use media technology to promote interaction among the newer immigrant groups throughout the city.

**Roeun Chan** has been instrumental in advocating for youth issues and programs both on a local and a statewide level. He has served on a youth panel, eloquently addressing the needs of adolescents in Lowell before an audience that included government leaders. In the summer of 2002, Roeun helped to coordinate the city's largest violence prevention event for youth: Summit 4 Peace. Roeun spoke to the audience of 400 community members and local teens about youth violence.

Mr. Chan was a mentor in the ADAM project, during which he advised younger teens on violence prevention, teen pregnancy prevention, and youth leadership. Roeun's personal skills and enthusiasm have led him to be a leader in Lowell. His work on behalf of community betterment, youth empower-

ment, and self-achievement serves as an example and inspiration to his peers.

**Therese O'Connor** is at the forefront of the volunteer spirit in Lowell. Her length of service only matches her breadth of philanthropic involvement. At the time of the award, she was the president of the Lowell Art Association at the Whistler House Museum, where she has been on the Board of Directors for 15 years. Terry has given more than 20 years of service in many different capacities to the Merrimack Repertory Theatre and contributed time and effort to the Lowell Association for the Blind. Her generosity includes helping other organizations such as the Lowell Garden Club and Rape Crisis Services of Lowell.

In the words of Terry's nominator, "On first glance, one may think that chairing a community event is glamorous...however, I personally have observed her cleaning, dusting, washing windows, and doing the behind the scenes work...to make the night extra special for her guests."

**Joan Chun** has been involved in a number of volunteer activities through the River Ambassadors Program at the University of Massachusetts Lowell. She brings with her a highly engaged and positive outlook, which spreads to other youth in her group. Joan took the lead in assisting with the



**2004 Volunteer of The Year winners, holding plaques are from left: Terry O'Connor, winner of this year's Bankers Volunteer Award; Joan Chun; and Sonia Skillman and Joan Binda representing Sun Microsystems, this year's Corporate Volunteer of the Year. Linda Chemaly, far left, and Mehmed Ali, co chaired the selection committee and presented the awards.**



logistics of the Cambodian New Year celebration, as well as being one of the key players at the Lowell Folk Festival's recycling program. This particular activity included getting deeply involved in the food waste sorting area – now that's a true volunteer! Joan has participated in Project Bread's annual Walk for Hunger, where she completed a 20-mile hike to raise money and awareness for this issue.

#### **2004 Corporate Volunteer of the Year Award Presented to Sun Microsystems**

The GLCF inaugurated its first Corporate Volunteer of the Year Award by honoring Sun Microsystems in Burlington, Massachusetts. Sun was recognized for helping its employees realize their commitments to community organizations and for its support of organizations throughout the region. In April 2004, during Sun's 10<sup>th</sup> annual Worldwide Volunteer Week, 22 teams composed of 209 Sun employees donated 1,151 hours to local community activities. Over the span of ten years, Sun teams have been involved in outdoor and indoor projects at 14 sites in Lowell, Billerica, Bedford, and Chelmsford, including the Lowell Historic Land Trust, House of Hope, Merrimack Valley Food Bank, Place of Promise, CTI, Billerica Kid's Connection, Contribution Park and Elder Center, Billerica Boys and Girls Club, and Bedford's Minuteman Bike Path. Sun Microsystems has "adopted" four local agencies: the Lowell YWCA, Lowell YMCA/Tewksbury Day Care Center, The Paul Center in Chelmsford, and Habitat for Humanity in Lowell.

From preparing back-to-school backpacks and Thanksgiving food baskets to purchasing holiday gifts for hundreds of children and for years of tutoring students in Lowell and Bedford, Sun Microsystems and its employees have earned this tribute.

#### **Community Engagement and Technical Assistance**

Throughout the year the GLCF meets with and supports organizations and individuals to address questions and issues about philanthropy and nonprofit management. The Foundation plays a more visible role as a convener, presenter, panelist, and/or leading participant in other programs and organizations in the region. David Kronberg, the Foundation's Executive Director, moderated a "Meet the Donors" program for regional nonprofit groups, presented by Associated Grant Makers. In May 2004 the Foundation's Director presented an overview of arts and cultural endowment funds at a cultural conference organized by the Cultural

Office of Lowell (COOL) and UMass Lowell; and the Foundation, in association with the Nonprofit Alliance of Greater Lowell (NPA), convened a presentation of a New England-wide study on the executive succession challenge confronting non-profit organizations.

During the period of this report, the Foundation served or continues to serve as a fiscal agent for Lowell High School, EdVestors/Boston Foundation and the Lowell School Department, Dracut Land Trust, Tufts University New Entry Sustainable Farming Project, One Lowell, The Thoreau Farm Trust, and three corporate- donor advised funds of California-based Community Foundation Silicon Valley (Juniper Networks, Aspect Communications, and Synopsys).

The Foundation advocates charitable planning and promotes charitable instruments such as remainder trusts and gift annuities to estate attorneys, financial planners, CPAs, and others in the professional advisory community. The executive director has presented programs and articles on this subject as a member of the Merrimack Valley Estate Planning Council. As a member of the Board of Directors of Associated Grant Makers (AGM), the state's professional association of grant makers, Mr. Kronberg speaks for community foundations and otherwise lends his voice in the development of AGM's public policy and programs. The Foundation is an active member of the Nonprofit Alliance, Greater Lowell Chamber of Commerce, and the Council on Foundations, the national trade association of philanthropies.



#### **Women Working Wonders Fund**

Leading women in the Greater Lowell area recently established the Women Working Wonders Fund, the region's first permanently endowed fund dedicated to women and girls in the region. The Foundation provides the full range of fund accounting and support services for this new fund, which has been established with its own women-run distribution committee and other working groups. The Women Working Wonders Fund promises to be a broadly supported and effective community fund, in large part due to the quality of leadership and the magnitude of issues and opportunities facing women and girls and their impact on our quality of life.

## **\$1.5 Million Theodore Edson Parker Foundation Challenge Grant Achieved Building Capacity for Nonprofits in Greater Lowell**

From 1999-2002, the Community Foundation faced its most difficult and protracted grant challenge, and in achieving it, secured a significant opportunity to define itself as an influential community resource. In November 1999, the Theodore Edson Parker Foundation challenged the GLCF to raise \$4 million in three years. Upon doing so, the GLCF would be awarded \$1.5 million to be used as a permanent discretionary endowment to address community needs.

The Community Foundation met the \$4 million endowment goal, within days of the December 31, 2002 deadline. In May 2003, the Parker Foundation formally announced the achievement of the challenge at the Seventh Annual Philanthropy Day. The challenge grant was named in honor of the original benefactors of the Parker Foundation. Distribution from the Moses Greeley and Mary Greeley Parker Morrison Fund for Lowell in 2005 will provide approximately \$75,000 in grants to strengthen the organizational capacity of nonprofits in the area.

During a formative period in the GLCF's history, when confidence needed to be established in this new community resource, the Theodore Edson Parker Foundation came forward and contributed a portion of its own endowment to the Greater Lowell Community Foundation. This remarkable challenge grant provided the boost that inspired hundreds of generous donors to build this major community resource. They contributed to and created their own endowments and scholarship legacies that extend their commitments to local charities and help to fulfill the educational dreams of high school graduates. The best and most enduring thanks we can give the Parker Foundation is to responsibly achieve our mission, to which they have dedicated so much of their own philanthropic legacy.

## **Nonprofit Center Study**

The boom in Lowell's downtown real estate development over the last several years and costlier energy and other facility related expenses are putting increasing upward pressure on rental expenses for nonprofit organizations, further jeopardizing their capacity to operate efficiently and serve the needs of their clients. While there is no easy solution to counteract these inevitable

forces, opportunities exist for nonprofit organizations both large and small to collaborate as an integrated group of prospective tenants.

The economy of scale of this collaboration not only offers opportunities for decreased or stabilized rent and operating expenses, but also offers the possibility to design individually tailored and shared spaces with efficient operating and technological systems and specialized programmatic features. Owners and developers would thus have the promise of a largely tenanted building with secured cash flow and nonprofit tenants could move into a building that better serves their individual, collective, client, and community needs.

In light of both the pressures put upon the nonprofit sector and the capacity of the sector itself to successfully respond to it, the Foundation feels that Lowell has reached the stage for such an enterprise to be considered.

In the spring of 2004, the Greater Lowell Community Foundation took a step forward in addressing the feasibility of such a Nonprofit Center. The survey, which was e-mailed to the region's nonprofit organizations and can be accessed and completed on the Community Foundation's website ([www.glcfoundation.org](http://www.glcfoundation.org)), gathered space needs, specifications, and operative value judgments of nonprofit organizations. The questions helped determine the feasibility of the Nonprofit Center, the mix of organization types suitable for cooperative leasing, and the necessary characteristics of the Center for success.

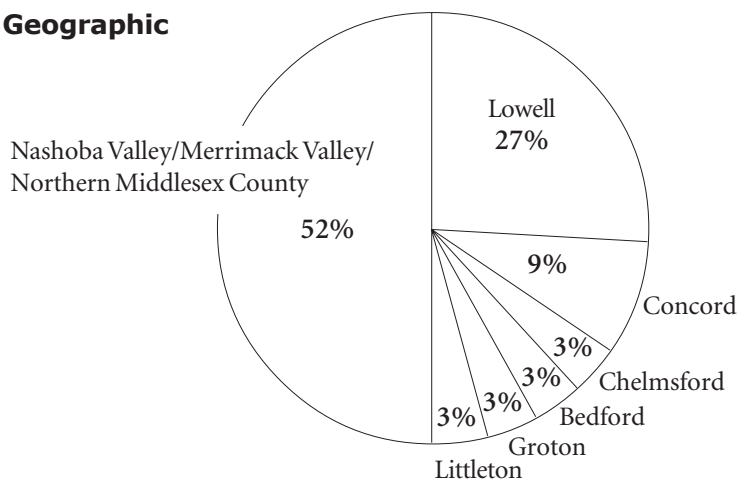
The executive summary of the survey, which is available by contacting the GLCF, has been delivered to several public and private economic development agencies and real estate developers in hopes that they can identify a building site and crystallize other plans for this ambitious enterprise.

# Greater Lowell Community Foundation Grants

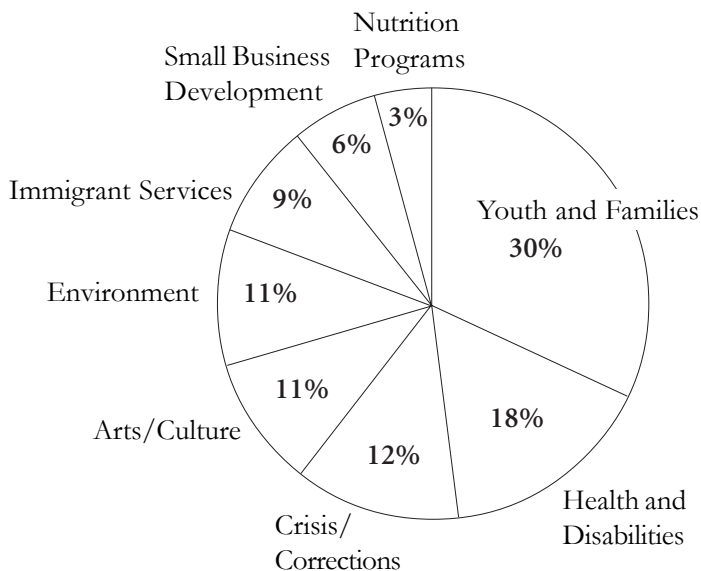
## Capacity Grants

One of the most effective ways to improve community life is to build capable and focused nonprofit organizations. Yet funding to strengthen core administrative operations of nonprofits is not widely available. From the Community Foundation's inception as a grant maker, it has steadily built discretionary endowment funds as a base of funding for this unique approach to community building. Since 1998, 169 grants worth \$470,000 have been awarded to the region's nonprofits helping them better achieve their missions in the cities and towns they serve.

## Grants by Geographic Area



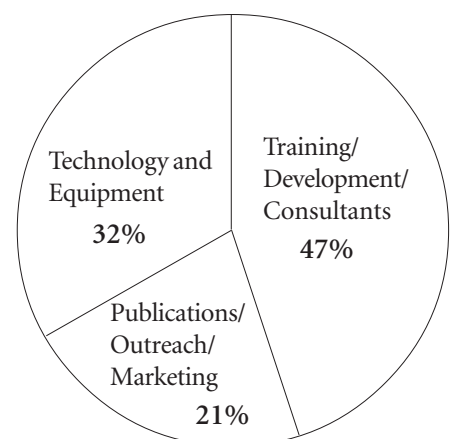
## Range of Interest of Grantees



## Combined 2003-2004 Capacity Grant Profile

Proposals Received	106
Proposals Reviewed	104
Proposals Funded	34 (33% Funded)
Total \$ Requested	\$295,753
Total \$ Awarded	\$67,753
Range Requested	\$1,050 – \$3,000
Range of \$ Granted	\$700 – \$3,000

## Type of Support Granted





# Grants By Program Area and Funding Source

## 2003

### Arts, Culture, and Humanities

#### Capacity Grants

Chelmsford Friends of Music, Inc., Chelmsford \$1,000.00  
*From the Juniper Networks Fund of the Community Foundation of Silicon Valley*  
To develop a website for the organization

#### Nonprofit Agency Endowment Funds

Lowell Historical Society, Lowell \$3,790.00  
*From the Lowell Historical Society Centennial Fund*

Merrimack Repertory Theatre, Inc., Lowell \$8,139.00  
*From the Merrimack Repertory Theatre Endowment Fund*

Whistler House Museum of Art, Lowell \$212.00  
*From the Whistler House Museum of Art Endowment Fund*

#### Designated Funds

American Textile History Museum, Lowell \$9,235.50  
*From the Anonymous and Nancy L. Donahue Funds*

Fitchburg Art Museum, Fitchburg \$4,643.80  
*From the Anonymous Fund*

Merrimack Repertory Theatre, Inc., Lowell \$22,624.37  
*From the Anonymous and Nancy L. Donahue Funds*

New England Quilt Museum, Lowell \$5,739.62  
*From the Nancy L. Donahue Fund*

Revolving Museum, Inc., Lowell \$4,591.70  
*From the Nancy L. Donahue Fund*

Whistler House Museum of Art, Lowell \$5,739.63  
*From the Nancy L. Donahue Fund*

Whistler House Museum of Art, Lowell \$433.00  
*From the Whistler House Arts Fund*

#### Donor Advised Funds

Bedford Historical Society, Inc., Bedford \$250.00  
*From the Moonan Family Fund*

Gertrude Chanler Rochester Philharmonic Orchestra Fund, Rochester NY \$1,000.00  
(A component fund of the Rochester Area Community Foundation)  
*From the Top of the Hill Fund*

Charles River Museum of Industry, Waltham \$150.00  
*From the Moonan Family Fund*

Greater Boston Youth Symphony Orchestras, Boston \$500.00  
*From the Moonan Family Fund*

Lowell Festival Foundation, Lowell \$13,900.00  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

Merrimack Repertory Theatre, Inc., Lowell \$1,000.00  
*From the Ruth C. & John E. Leggat Fund and the Top of the Hill Fund*

Revolving Museum, Inc., Lowell \$3,000.00  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

### Economic and Community Development

#### Capacity Grants

Roudenbush Community Center, Inc, Westford. \$3,000.00  
*From the Juniper Networks Fund of the Community Foundation of Silicon Valley*  
To continue development of Parent/Teacher training programs

#### Designated Funds

Tufts University New Entry Sustainable Farming Project, Boston \$572.33  
*From the Ogonowski New Farm Families Project*

#### Donor Advised Funds

Keep Lowell Beautiful, Inc., Lowell \$250.00  
*From the Mary J. Bacigalupo Community Fund*

Lowell Heritage Partnership, Lowell \$250.00  
*From the Mary J. Bacigalupo Community Fund*

### Education

#### Designated Funds

Lowell High School, Lowell \$2,634.70  
*From the James Herscot Lacrosse Fund*  
An in-kind donation of lacrosse equipment for students from low-income backgrounds

Pepperell Lawrence Library, Pepperell \$928.76  
*From the Anonymous Fund*

Tufts University, Medford \$5,572.56  
*From the Anonymous Fund*

Varnum Elementary School Library, Lowell \$646.20  
*From the Marguerite H. Colgate Memorial Library Fund*



Justice Resource Institute's staff and homeless teens from the GRIP shelter protest service budget cuts at the Statehouse. The Director stated that "it was a great teaching and expression day for our kids, to make them aware of their own power, and the meaning of democracy and caring about more than just themselves."



**Lowell Community Health Center staff members reach out to the Lowell residents at the events such as the Puerto Rican Festival, Khmer Cultural Festival and other major public gatherings.**

### **Donor Advised Funds**

Citizens Scholarship Foundation of Bedford \$150.00  
*From the Moonan Family Fund*

Harvard Business School Fund, Boston \$300.00  
*From the Moonan Family Fund*

Hawken School Advancement Office, Gates Mills OH \$100.00  
*From the Moonan Family Fund*

Iowa State University Foundation, Ames IA \$100.00  
*From the Moonan Family Fund*

Lowell Catholic High School, Lowell \$300.00  
*From the Charlotte and Michael LaPierre Charitable Fund*

Mayfield Junior School, Pasadena CA \$2,500.00  
*From the David W. and Jean D. Donahue Charitable Fund*

Merrimack College – Friends of Merrimack College, North Andover \$500.00  
*From the Top of the Hill Fund*

Northern Essex Community College Foundation, Inc., Haverhill \$2,500.00  
*From the David W. and Jean D. Donahue Charitable Fund*

Amos Tuck School of Business at Dartmouth, Hanover NH \$250.00  
*From the David W. and Jean D. Donahue Charitable Fund*

Western Reserve Academy, Hudson OH \$150.00  
*From the Moonan Family Fund*

Yale University Alumni Fund, New Haven CT \$250.00  
*From the Moonan Family Fund*

## **Environment and Conservation**

### **Capacity Grants**

Lowell Parks & Conservation Trust, Inc., Lowell \$700.00  
*From the Moses Greeley Parker Fund*  
For web design and supplies

### **Designated Funds**

Dracut Land Trust, Inc., Dracut \$573.33  
*From the Ogonowski New Farm Families Project*

New England Forestry Foundation, Groton \$9,287.60  
*From the Anonymous Fund*

### **Donor Advised Funds**

Nature Conservancy, Boston \$500.00  
*From the Top of the Hill Fund*

### **Water Resources Endowment Funds**

Lowell Parks & Conservation Trust, Inc., Lowell \$1,572.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
To expand & improve protection of property in the Concord River Greenway

Massachusetts Audubon Society, Lincoln \$1,209.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
For the Rover Schools field study & community service program for elementary & high school students in the SuAsCo & Merrimack watershed areas

Merrimack River Watershed Council, Lowell \$4,560.84  
*From the Merrimack River Watershed Fund*  
To develop & expand the Merrimack River Connection program, a water monitoring project for middle school students & their parents.

Nashua River Watershed Association, Groton \$2,000.00  
*From the Nashua River Watershed Fund*  
To continue a volunteer sampling program in conjunction with the Division of Watershed Management

Sudbury Valley Trustees, Sudbury \$1,209.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
To improve wildlife habitat & watershed protection in Billerica's Veterans Park & Ralph Hill Conservation Area and Informational Kiosk

## **Health**

### **Capacity Grants**

Lowell Community Health Center, Lowell \$2,300.00  
*From the Moses Greeley Parker Fund*  
To hire outside assistance in developing Outreach Tracking and Evaluation and Purchasing systems

## Designated Funds

Lowell General Hospital Cancer Center, Lowell  
\$1,090.00

*From the Ruth C. & John E. Leggat Fund*

## Donor Advised Funds

Lowell General Hospital - Transitional Care Unit,  
Lowell \$420.42

*From the Mary J. Bacigalupo Community Fund*

Saints Memorial Medical Center - Cancer Center,  
Lowell \$325.00

*From the Mary J. Bacigalupo Community Fund*

Visiting Nurse Association of Greater Lowell, Inc.  
\$630.00

*From the Ruth C. & John E. Leggat Fund*

Winchester Friends of Hospice, Inc., Stoneham  
\$750.00

*From the David W. and Jean D. Donahue Charitable  
Fund*

## Religion

### Nonprofit Agency Endowment Funds

Oblate Mission Guild, Tewksbury \$5,115.00

*From the Father Thomas J. Reddy Oblate Mission Guild  
Fund*

### Designated Funds

First Church of Christ, (Unitarian), Lancaster  
\$4,643.80

*From the Anonymous Fund*

St. Benedict's Priory, Still River \$500.00

*From the Top of the Hill Fund*

## Social Services

### Capacity Grants

Cambodian American League of Lowell, Lowell  
\$2,200.00

*From the Moses Greeley Parker Fund*

For single software license, one year of tech support,  
DVD-RW and a computer drive for CALL's Individual  
Development Account program

Challenge Unlimited, Inc. at Ironstone Farm,  
Andover \$1,500.00

*From the Moses Greeley Parker Fund*

To broaden awareness of and access to Challenge  
Unlimited's programs and services

Concord Prison Outreach, Concord \$1,445.00

*From the Moses Greeley Parker Fund*

To provide training courses, domain name and web  
hosting

Massachusetts Alliance of Portuguese Speakers,  
Cambridge \$725.00

*From the Moses Greeley Parker Fund*

To conduct a series of focus groups in the Lowell area

Merrimack Valley Food Bank, Lowell \$3,000.00

*From the Jessie B. Cox Charitable Lead Trust*

To facilitate a merger with M/A-COM Food Share and  
promote the Food Bank (Note: This was a redirection  
of a 2002 capacity grant awarded to M/A-COM Food  
Share)

Merrimack Valley Food Bank, Lowell \$1,000.00

*From the Harold J. and Mildred LeClair Fund*

To upgrade outdated telephones

ONE Lowell: Building the New American Commu-  
nity, Lowell \$1,500.00

*From the Moses Greeley Parker Fund*

To continue the Immigrant/Refugee Leadership  
Development Training project

Rape Crisis Services of Greater Lowell, Inc., Lowell  
\$3,000.00

*From the Moses Greeley Parker Fund*

For a professional consultant and workshop fees

### Nonprofit Agency Endowment Funds

International Institute of Lowell, Inc., Lowell \$466.00

*From the Alexander C. Anton and Charles J.*

*Antonopoulos Fund*

LifeLinks, Inc., Lowell \$448.00

*From the LifeLinks Endowment Fund and the Zaher-  
Lacouture-Galotta Family Fund*

### Designated Funds

Retarded Adults Rehabilitation Association, Lowell  
\$4,591.70

*From the Nancy L. Donahue Fund*

United Way of Merrimack Valley, Inc., Ward Hill  
\$1,090.00

*From the Ruth C. & John E. Leggat Fund*

Legal assistant Julie  
Sophan Hack takes a  
picture of David Chieh, Sr.  
with the new digital  
passport camera awarded  
the International  
Institute of Lowell to  
provide photographs of  
clients required for  
immigration documents.





## Donor Advised Funds

Catholic Charities of Merrimack Valley, Lowell \$500.00  
*From the David Bernard Memorial Fund*

Challenge Unlimited, Inc. at Ironstone Farm, Andover \$1,500.00  
*From the Ruth C. & John E. Leggat Fund and the Charlotte and Michel LaPierre Charitable Fund*

Chelmsford Community Exchange, Inc., Chelmsford \$251.00  
*From the David Bernard Memorial Fund*

Community Teamwork, Inc./ Citizen Schools Project, Lowell \$250.00  
*From the Mary J. Bacigalupo Community Fund*

Community Teamwork, Inc./ New Farm Families Program, Lowell \$541.50  
*From the John A. Ogonowski Memorial Fund*

Community Teamwork, Inc./ Youth-Build, Lowell \$541.50  
*From the John A. Ogonowski Memorial Fund*

Merrimack Valley Food Bank, Inc., Lowell \$750.00  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

Open Pantry of Greater Lowell, Inc., Lowell \$630.00  
*From the Ruth C. & John E. Leggat Fund*

Tewksbury Hospital Equestrian FARM, Tewksbury \$618.00  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

## Youth Development

### Capacity Grants

Boys & Girls Club of Greater Lowell, Lowell \$1,500.00  
*From the Moses Greeley Parker Fund*  
For training to retain staff and increase competencies

Communities Caring for Kids Coalition, Lowell \$3,000.00  
*From the Moses Greeley Parker Fund*  
To expand the Coalition's outreach in minority communities

Concord Family and Youth Services, Inc., Acton \$2,480.00  
*From the Moses Greeley Parker Fund*  
To provide registration for 8 staff at a training retreat

Kids in Disability Sports, Inc., Lowell \$1,800.00  
*From the Moses Greeley Parker Fund*  
To improve the website and other public relations and marketing materials

United Teen Equality Center, Lowell \$1,900.00  
*From the Moses Greeley Parker Fund*  
For a bar code scanner and ID card recognition equipment

## Donor Advised Funds

Adolescent Consultation Services, Inc., Cambridge \$500.00  
*From the Ruth C. & John E. Leggat Fund*

Chernobyl Children Project USA, Inc., Dedham \$184.00  
*From the Allan P. MacLean, Jr. Memorial Fund*

Girls Incorporated of Greater Lowell, Lowell \$500.00  
*From the Ruth C. & John E. Leggat Fund*

# 2004

## Arts, Culture, and Humanities

### Capacity Grants

Bedford Historical Society, Inc., Bedford \$444.00  
*From the Founders Discretionary Fund*  
To create a management information system for artifacts

Indian Hill Music Center, Littleton \$3,000.00  
*From the Moses Greeley Parker Fund*  
To purchase software and equipment

Lowell Historical Society, Lowell \$2,646.00  
*From the Moses Greeley Parker Fund*  
To design and print a promotional brochure

## Economic and Community Development

### Capacity Grants

Lowell Small Business Assistance Center, Lowell \$2,009.00  
*From the Moses Greeley Parker Fund*  
To purchase a computer and software for the resource library

## Education

### Designated Funds

Lowell High School, Lowell \$4,044.47  
*From the James Herscot Lacrosse Fund*  
An In-kind donation of lacrosse equipment for students from low-income backgrounds

Tyngsboro High School, Tyngsboro \$3,456.60  
*From the James Herscot Lacrosse Fund*  
An In-kind donation of lacrosse equipment for students from low-income backgrounds

## Environment and Conservation

### Capacity Grants

Lowell Parks & Conservation Trust, Inc., Lowell \$1,946.00  
*From the Moses Greeley Parker Fund*  
To develop an organizational brochure in support of a new development plan



**Girls Inc. girls puzzle out Tangram shapes as part of Operation Smart (Science, Math and Relevant Technology).**

Nashua River Watershed Association, Groton  
\$1,824.00  
*From the Nashua River Watershed Fund*  
To provide professional training for staff in use of membership and donation software

SuAsCo Watershed Community Council, Maynard  
\$323.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
To help convert the Council's slide show into PowerPoint

## Water Resources Endowment Funds

Lowell Parks & Conservation Trust, Inc., Lowell  
\$1,500.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
For the RiverFest 2005 in collaboration with the Revolving Museum

Lowell Telecommunications Corporation, Lowell  
\$1,079.00  
*From the Merrimack River Watershed Fund*  
To produce a television program on environmentally safe alternatives for lawns and gardens to protect the watershed

Massachusetts Audubon Society, Lincoln \$2,500.00  
*From the Concord-Assabet-Sudbury (SuAsCo) River Watershed Fund*  
For the RiverSchools Initiative for 4th and 6th grade students at two schools in Lowell

Merrimack River Watershed Council, Inc., Lowell  
\$3,570.00  
*From the Merrimack River Watershed Fund*  
For an inventory and analysis of facilities and recreational opportunities along the Merrimack River

Nashua River Watershed Association, Groton  
\$2,500.00  
*From the Nashua River Watershed Fund*  
To support the Watershed Association's volunteer water quality monitoring program

## Health

### Capacity Grants

Visiting Nurse Association of Greater Lowell, Inc., Lowell \$3,000.00  
*From the Moses Greeley Parker Fund*  
To purchase a portable EKG for diagnosing homebound heart patients

## Social Services

### Capacity Grants

Acre Family Day Care, Lowell \$3,000.00  
*From the Moses Greeley Parker Fund*  
To provide professional development training for staff

Alternative House, Inc., Lowell \$2,350.00  
*From the Moses Greeley Parker Fund*  
To purchase computer equipment and copiers



Big Brother Big Sister of Greater Lowell, Lowell  
\$2,500.00  
*From the Moses Greeley Parker Fund*  
To implement a new Performance Management System and Database

Challenge Unlimited, Inc. at Ironstone Farm, Andover \$2,200.00  
*From the Moses Greeley Parker Fund*  
To upgrade fundraising software and print new brochures

International Institute of Lowell, Inc., Lowell  
\$1,870.00  
*From the Moses Greeley Parker Fund*  
To purchase a digital passport photo system

Lowell Association for the Blind, Lowell \$1,800.00  
*From the Moses Greeley Parker Fund*  
To provide computer training for staff

Lowell House, Inc., Lowell \$2,800.00  
*From the Moses Greeley Parker Fund*  
To review and update the organization's mission, vision, and Strategic Plan

Catholic Charities of Merrimack Valley, Lowell  
\$3,000.00  
*From the Founders Discretionary Fund*  
To purchase computer equipment for the Young Parents Program

## Youth Development

### Capacity Grants

Boys & Girls Club of Greater Lowell, Lowell \$2,000.00  
*From the Moses Greeley Parker Fund*  
To fund a photography project facilitating marketing and communication initiatives

Girl Scouts of Spar and Spindle Council, Inc., North Andover \$2,200.00  
*From the Moses Greeley Parker Fund*  
To purchase new computer equipment

GRIP Project / Justice Resource Institute, Lowell  
\$2,920.00  
*From the Moses Greeley Parker Fund*  
To send new staff to New England Network's Youthworker Conference

**Volunteers with Lowell Parks & Conservation Trust net Alewife on the Nemasket River. The fish were then transported to the Concord River as part of LPCT's efforts to reestablish a breeding population of river herring.**

# How to Apply for a Grant

## What the Greater Lowell Community Foundation Funds

**Administrative and Organizational Capacity Building.** These grants are intended to strengthen the administrative and organizational management capacity of nonprofit organizations so they can more effectively achieve their missions. Projects should address one or more of the following eligible activities: strategic planning, board development, staff training, human resource management, marketing, public relations, membership development, fundraising planning, development of financial and information management systems, intra-agency and inter-agency collaboration, facilitation of merger, small equipment purchase, and other projects that increase organizational capacity.

**Water Resources Initiatives.** These grants provide funds to protect, conserve, and improve the Nashua, Sudbury-Assabet-Concord (SUASCO) and Merrimack River Watersheds in Northern Middlesex County. Initiatives can include a broad range of water-related projects involving biological conservation and habitat restoration projects, water monitoring, community-based clean-ups and other grassroots stewardship activities, point and non-point pollution prevention actions, GIS inventory of riparian and related open space features, school and community-based water resource education programs, and other science-based water resource management projects that have direct and practical application.

## Who Is Eligible

To be considered for a grant, an agency or coalition must:

- Be a nonprofit, tax exempt organization under 501(c)(3) and not a private foundation under the Internal Revenue Code. Applicants that do not have a tax-exempt status under IRC 501(c)(3) must secure a commitment from a

financial sponsor/fiscal agent that is a 501(c)(3) organization to take on fiduciary responsibilities in connection with this grant;

- Serve the people of Ashby, Ayer, Bedford, Billerica, Burlington, Carlisle, Chelmsford, Concord, Dracut, Dunstable, Groton, Littleton, Lowell, Pepperell, Shirley, Tewksbury, Townsend, Tyngsboro, Westford, and Wilmington;
- Certify that the organization endorses a policy of non-discrimination; and,
- Meets all other criteria in the guidelines and applications.

## Proposals

For a detailed checklist of all the information to include in a proposal to the Foundation, call 978-970-1600 to request a copy of our submission guidelines or visit our website at [www.glcfoundation.org](http://www.glcfoundation.org), which has all of the information and necessary forms.

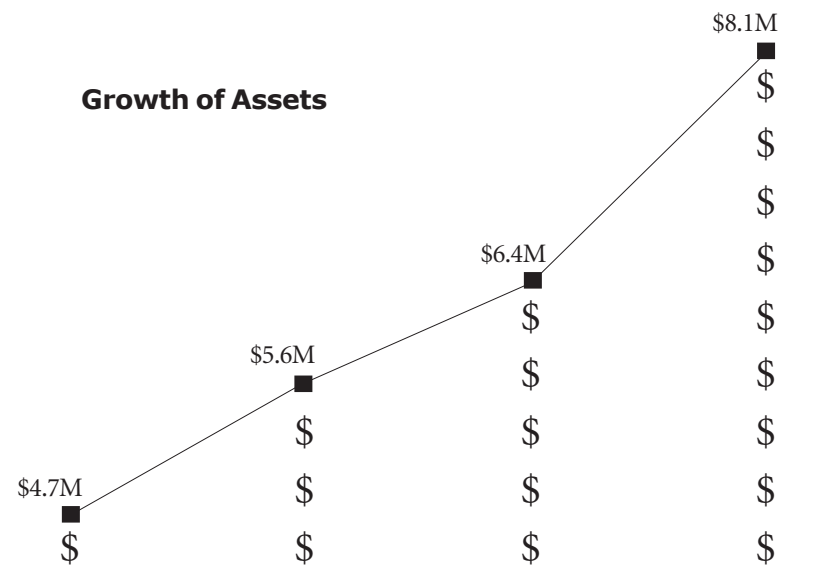
## Deadlines

Applications are available from January through March of each year. The deadline for grant programs is the last weekday that falls on or before March 15. Grants are distributed annually by the Foundation and announced at its annual Philanthropy Day conference.



# Financial Profile

Condensed Financial Statements	March 31, 2001	March 31, 2002	March 31, 2003	March 31, 2004
<b>Assets:</b>				
Cash and Investments	\$4,573,010	\$5,553,863	\$5,355,092	\$7,725,835
Unconditional Promises to Give	62,064	56,229	1,039,927	384,627
Property, Equipment and Other Assets – Net	39,304	28,520	15,345	12,783
<b>Total Assets</b>	<b>\$4,674,378</b>	<b>\$5,638,612</b>	<b>\$6,410,364</b>	<b>\$8,123,245</b>
<b>Liabilities:</b>				
Accounts Payable/Accrued Expenses	11,596	9,495	27,817	26,275
Charitable Gift Annuities	10,645	14,638	12,308	9,978
Fiscal Agent & Agency Endowment Funds	235,258	395,257	440,354	665,269
<b>Total Liabilities</b>	<b>\$257,499</b>	<b>\$419,390</b>	<b>\$480,479</b>	<b>\$701,522</b>
<b>Net Assets:</b>				
Total Net Assets	4,416,879	5,219,222	5,929,885	7,421,723
<b>Total Liabilities and Net Assets</b>	<b>\$4,674,378</b>	<b>\$5,638,612</b>	<b>\$6,410,364</b>	<b>\$8,123,245</b>
<b>Support and Revenue:</b>				
Total Support and Revenue	\$186,576	\$1,458,578	\$1,329,918	\$2,048,173
<b>Expenses:</b>				
Grants and Scholarships	319,230	375,868	389,685	332,310
Other Programs	245,715	241,416	140,677	144,920
General Expenses	34,563	38,951	88,893	79,105
<b>Total Expenses</b>	<b>\$599,576</b>	<b>\$656,235</b>	<b>\$619,255</b>	<b>\$556,335</b>



# Greater Lowell Community Foundation Funds

## Nonprofit Agency Funds

### Anita Moeller Endowment Fund for Acre Family Day Care

An agency endowment established by Acre Family Day Care named in honor of its founding Executive Director.

### Alexander C. Anton and Charles J. Antonopoulos Fund for the International Institute of Lowell

An endowment for the International Institute of Lowell, an agency providing counseling and assistance to immigrants.

### Children's Museum Lowell Endowment Fund

An agency endowment fund to provide operating, capital campaign, and program support to the new Children's Museum that plans to open in 2004.

### Community Teamwork, Inc. Endowment Fund

An endowment fund for the region's largest anti-poverty agency.

### Goodwill Industries of Merrimack Valley Endowment Fund

An endowment to support the operations of Goodwill Industries of Merrimack Valley, which provides assistance to disabled and disadvantaged persons.

### Greater Lowell Community Foundation Endowment Funds

- **Peter S. Stamas Fund**  
Created by Peter's sister, Athena Stamatakakos, after his death, this fund supports the operations of the Community Foundation, of which Peter was a founding director and Treasurer.
- **Mary E. Harrington Fund**  
A permanent fund to support the administrative operations of the Greater Lowell Community Foundation funded by a bequest from Mary E. Harrington.

### LifeLinks Endowment Fund

A permanent fund to support this regional nonprofit organization dedicated to providing services to developmentally disabled people.

### Lowell Historical Society Centennial Fund

An agency fund to provide annual distributions to support the operations and programs of the Historical Society.

### Massachusetts Alliance of Portuguese Speakers Endowment (MAPS)

An agency endowment to provide operating support to the Massachusetts Alliance of Portuguese Speakers, Inc., and its Lowell office.

- **The Manuel N. Coutinho Citizenship Fund**  
A component fund of the MAPS Endowment supports the citizenship programs of the Massachusetts Alliance of Portuguese Speakers, Inc. that facilitate the integration of Portuguese-speaking immigrants into American life.

The following funds were established to support the work of MAPS. Except where noted, these funds were established by gifts from the individuals named.

- **MAPS Board of Directors Fund**
- **Robert and Joanne Perry Family Endowment Fund** – established by the Perrys to honor the Pinto family
- **Raul and Marie Pinto Family Fund** – set up by the Alliance's Executive Director to honor his parents
- **Josefina Brandao Silva Family Fund** – established by her family in her memory

### Merrimack Repertory Theatre Endowment

An agency endowment to provide general operating support for the Merrimack Repertory Theatre.

### Merrimack Valley Housing Partnership Endowment Fund

A permanent endowment to support the Merrimack Valley Housing Partnership, an agency providing assistance to low-income families who are first-time homebuyers.

### Nashua River Watershed Association Endowment Fund

An agency endowment to support the operations of the Nashua River Watershed Association, an environmental and water resources advocacy group.

### New England Quilt Museum Endowment Funds

An endowment set up by the New England Quilt Museum, its guilds, and individual donors. These funds support the operations and activities of the Museum, which celebrates the history of quilting. These endowments include:

- 100th Town Quilters Fund
- Carol W. Baird Fund
- Concord Piecemakers Guild Fund
- Greater Hartford Quilt Guild Fund
- Huntington Quilters Fund\*
- Narragansett Bay Quilters Association Fund
- New England Quilt Museum Auxiliary Fund
- Nimble Thimblers Fund
- Plymouth County Cranberry Quilters Fund
- Quilters' Connection Fund
- Rhododendron Needlers Quilt Guild Fund

### The Paul Center Endowment Fund

An endowment to support the operations of the Paul Center for Learning and Recreation, an organization providing educational, recreational, and social opportunities for children and young adults with developmental disabilities and their families.

**Funds from the Anita Moeller Endowment for Acre Family Day Care will assist in the training of urgently needed daycare providers.**



#### **Revolving Museum Endowment Fund**

An agency fund to support the Revolving Museum, a contemporary art museum in downtown Lowell that recently relocated from Boston.

#### **United Way of Merrimack Valley Endowment Fund**

An unrestricted endowment to support the charitable activities of the United Way of Merrimack Valley.

#### **Whistler House Museum Endowment Fund**

An agency endowment fund to support the operations of the Museum.

### **Field of Interest Funds**

#### **Bankers Volunteer of the Year Award Fund**

An endowed fund, supported entirely by local banks, which provides two \$1,000 awards to recognize outstanding volunteer efforts by individuals. The recipients then donate the awards to the nonprofit organizations of their choice.

#### **Community Impact – Social Services Fund**

A fund established by the Community Foundation in response to a challenge grant from the Theodore Edson Parker Foundation. The fund supports nonprofit organizations providing social services.

#### **Greater Merrimack Valley Arts Fund**

A field of interest fund to provide funding for cultural and artistic organizations

#### **Lowell United Development Fund**

A field of interest fund for nonprofit organizations dedicated to supporting economic and business enterprise development in Lowell.

#### **Nancy L. Donahue Public Arts Fund for Lowell**

A field of interest fund to support visual and performing arts projects in Lowell.

#### **Nicholas Fund for the Prevention of Domestic Violence**

A donor-advised field of interest fund to support organizations working to prevent domestic violence and treat its victims. Grants will be distributed when the fund reaches \$10,000.

#### **Northern Middlesex Water Resources Endowment**

An endowment created with donations from individuals and a challenge grant from the Massachusetts Environmental Trust. The endowment will provide grants annually on a competitive basis through three separate funds:

- Concord-Assabet-Sudbury (SuAsCo) Watershed Fund
- Merrimack River Watershed Fund
- Nashua River Watershed Fund

#### **Youth Development Fund**

A fund established by an anonymous gift to support youth programs in the Greater Lowell area.



#### **Women Working Wonders Fund**

A fund created by women leaders in Lowell's business and civic circles to help organizations providing support for women and development for young girls.

### **Designated and Multipurpose Funds**

#### **Anonymous Designated Fund**

This gift provides permanent support for nine institutions in the Greater Lowell area. The institutions include a regional hospital, a university, two cultural institutions, two environmental organizations, a town library, a church, and the Community Foundation.

#### **Marguerite H. Colgate Memorial Library Fund**

A fund established to provide books, media equipment, and library programs for the Varnum Arts MicroSociety School Library at the Varnum School, an elementary school in Lowell.

#### **Nancy L. Donahue Fund**

This fund designates seven cultural, artistic, and philanthropic organizations as perpetual beneficiaries.

#### **Elderly and Disability Access Fund**

A designated fund established by a private donor to facilitate upgrades to public transportation in Lowell to ease access for those with physical disabilities.

#### **Erna Fayat Fund**

A fund that honors the life of Erna Fayat by supporting ArtSave programs at Lowell's Alternative House and other programs dealing with domestic violence.

#### **Leo and Matthew Flynn Memorial Scholarship Fund**

A fund to provide a tuition scholarship to Bishop Guertin High School in Nashua or an entering student from the immediate Lowell area, and a college scholarship to a Lowell High School graduating senior.

**Henry David Thoreau's birth house, located on 20 acres of Concord farmland, is the focus of the Thoreau Farm Trust's plans to restore and rehabilitate the historic farmhouse. The Trust also plans to construct a modest barn to serve as an education center with programming on agriculture and on Thoreau's legacy as a naturalist, environmentalist, and author. A donor created an endowment at the Community Foundation and also generated a cash distribution to The Thoreau Farm Trust through a reinsured charitable gift annuity.**



**James Herscot Lacrosse Fund**

A designated fund to provide lacrosse equipment to youth from economically disadvantaged homes, thus making the sport accessible to those who could not otherwise afford it.

**Elliot Kaplan/Avid Scholarship Fund**

A media studies scholarship fund established by Avid Technologies, Inc. in memory of Elliot Kaplan, one of its employees, to award scholarships at Lowell and Brookline High Schools and to support the Boston Film Video Foundation.

**Kittredge Park Fund**

A designated fund to supplement annual landscaping and maintenance for Kittredge Park in Lowell.

**Harold J. and Mildred Leclair Fund**

A designated fund providing discretionary grants through the Community Foundation and a tuition scholarship to attend Lowell Catholic High School in honor of Harold J. Leclair and Francis J. Rice, Jr.

**Ruth C. and John E. Leggat Fund**

A combination designated and donor-advised fund which provides annual distributions to nonprofit organizations of interest to the Leggats.

**Susan E. Leggat Lowell Festival Fund**

Established by Susan's family in her memory, this endowment will provide funding for cultural festivals in Lowell and especially the Lowell Folk Festival, which Susan was instrumental in building into the centerpiece of Lowell's cultural calendar.

**Lowell Banjo and Fiddler Contest Endowment Fund**

A fund to support the planning and production of the annual Lowell Banjo and Fiddler Contest.

**Lowell Canalways and River Walkways Maintenance Fund**

Established by the Lowell Heritage Partnership Trust to provide landscaping, beautification, and other improvements to the public walkways bordering Lowell's historic canals and rivers.

**Lowell Latin Lyceum Association Fund**

A permanent endowment to support the Lowell Latin Lyceum Association in providing a classical academic curriculum to gifted students at Lowell High School.

**Lowell Summer Music Series Endowment Fund**

A fund to support the planning and production of the annual Lowell Summer Music Series.

**Lowell 200th Anniversary Fund**

A fund designated to support the 200th Anniversary celebration of the city of Lowell in the year 2036.

**John A. Ogonowski Memorial Fund and New Farm Families Project**

A donor-advised fund established in memory of Captain John Ogonowski, the pilot of American Airlines Flight 11, to advance his charitable endeavors.

**Ogonowski New Farm Families Project**

Initiated with a grant from the Theodore Edson Parker Foundation, this fund specifically addresses Captain Ogonowski's interest in helping recent immigrants with agricultural backgrounds to become successful farmers in Massachusetts.

**Carrie B. Progen Scholarship Fund**

An annual scholarship awarded to a student graduating from Oakmont Regional High School in Ashburnham, MA, to pursue study in the arts. It was established in memory of Ms. Progen, who perished on September 11, 2001, while at work at AON on the 100th floor of World Trade Center Tower 2.

**Father Thomas J. Reddy Oblate Mission Guild Fund**

A fund established in honor of Father Reddy to provide holiday gifts for economically disadvantaged children.

**Kathryn Stoklosa Knowledge Bowl Fund**

An endowment to provide permanent funding for the Kathryn Stoklosa Knowledge Bowl, an annual academic competition for middle school students.

**Whistler House Museum Arts Fund**

A permanently endowed fund to support Lowell-based arts programs.

**Zaher-Lacouture-Galotta Family Fund**

A hybrid designated and scholarship fund set up to support LifeLinks, Inc., and to provide scholarships to Lowell High School students of Syrian and Lebanese descent.

**George Zingali Memorial Fund**

A scholarship established for outstanding students active in competitive marching arts and drums and bugle corps programs.

**Donor-Advised Funds****The Avid Fund**

A corporate donor-advised fund created by Avid Technology, Inc. to provide grants to community organizations.

**Mary J. Bacigalupo Community Fund**

A donor-advised fund to honor Mary J. Bacigalupo's outstanding volunteer contributions to the Lowell community.

**David Bernard Memorial Fund**

A donor-advised fund established in Mr. Bernard's memory following his death from injuries sustained on September 11, 2001. The fund supports the charitable interests of the Bernard family.

**Boisvert Fund**

A donor-advised fund established by William R. Doyle and Kay Doyle, Ph.D., to honor their family members and to support charitable interests.

**David W. and Jean C. Donahue Charitable Fund**

A donor-advised fund that supports the charitable interests of the Donahues.

**Enterprise Bank Community Gifts Fund**

A donor-advised fund established in celebration of Enterprise Bank's tenth anniversary to provide charitable gifts in the towns in which the bank operates.

**Andrew Curry Green Memorial Fund**

A donor-advised fund established by Mr. Green's widow to further their charitable endeavors following his death on September 11, 2001.

**James Edward Hayden Memorial Fund**

A donor-advised fund established by Mr. Hayden's widow to honor his life and support the charitable organizations and activities of interest to the Hayden family.

**Human Services Corporation Endowment Fund**

A donor-advised fund directed by the board of directors of the Human Services Corporation to support programs, conferences, and other initiatives consistent with the mission of the Human Service Corporation.

**Kronberg Family Fund**

Created by the Community Foundation's executive director, the fund will provide an opportunity to award gifts to various nonprofit groups of interest to him, his wife, and son.

**Charlotte and Michel LaPierre Charitable Fund**

A donor-advised fund that supports the LaPierre's charitable endeavors.

**Allan P. MacLean, Jr. Memorial Fund**

A donor-advised fund established by the parents of Allan P. MacLean, Jr., to support charitable organizations in his memory.

**Mayo Fund**

A donor-advised fund to provide scholarships and distributions to nonprofit and civic organizations.

**Moonan Family Fund**

A donor-advised fund to support the charitable interests of the Moonan family.

**Top of the Hill Fund**

A donor-advised fund to provide funding to organizations that support the charitable interests of the donors.

**Discretionary Funds****Founders Discretionary Fund**

A permanent discretionary fund established with and continually supplemented by contributions from local citizens to provide support to nonprofit organizations. The Community Foundation's Organizational Capacity Grant Program supports nonprofit organizations on a competitive basis through recommendations made by the Distribution Committee and the Board of Directors.

**Moses Greeley Parker and Mary Greeley Parker Morrison Fund for Greater Lowell**

A discretionary fund that currently supports grant making by the Community Foundation to strengthen the organizational capacity of local nonprofit groups.

**Deferred Gifts**

Three charitable gift annuity contracts now provide lifetime income to donors. The remainder in the gift annuities will benefit the New England Quilt Museum Endowment Fund upon the death of the individuals.

**The Enterprise Bank 9/11 Disaster Fund for Local Families**

Following the tragic events of September 11, 2001, Enterprise Bank and Trust Company collected donations to assist the families of local victims of the attacks. This fund ultimately amassed more than \$111,000, which was distributed to the families of 18 victims. The following funds, which are described in more detail above, were endowed by the families:

- David Bernard Memorial Fund
- Andrew Curry Green Memorial Fund
- James Edward Hayden Memorial Fund
- John A. Ogonowski Memorial Fund
- Carrie B. Progen Scholarship Fund

**Michel LaPierre with Ann Durkin at recent Lowell Catholic graduation. Michel was both a graduation speaker and a contributor to Lowell Catholic High School from the Charlotte and Michel Charitable Fund, a donor advised fund.**



## **Lowell High School Campaign for Educational Excellence**

Lowell High School created the Community Foundation's first endowed fund in March of 1998 through a transfer of funds supporting 39 scholarships. The Foundation now provides scholarship management services to LHS for more than 60 endowed scholarships, funds and prizes. Annually, more than \$70,000 is awarded in book prizes and scholarships to scores of students from the funds listed below.

### **Edward J. Babigan Scholarship Fund**

Established in Mr. Babigan's memory to be awarded to the best chemistry student.

### **Walter A. Bacigalupo Scholarship Fund**

Established by his family in memory of Walter, a graduate of LHS in 1987. This scholarship is awarded to seniors pursuing an education at a Massachusetts public university or community college.

### **Atty. Maurice Barlofsky Scholarship Fund**

Established to provide a scholarship for four years to students attending Boston University who demonstrate financial need.

### **Bartlett School Alumni Scholarship Fund**

Provides scholarships to Bartlett School graduates. The elements used to determine the recipients, in priority order, are need, scholarship, character, service and participation in school activities.

### **John J. Beaulieu Poetry Prize Fund**

Established by LHS alumnus '38 and retired teacher John Beaulieu. This book prize is given for the best poem written by a graduating senior.

### **Brian Belleau Scholarship Fund**

Unrestricted.

### **Albert and Doris Bourgeois Scholarship Fund**

This scholarship honors Albert and Doris, known as "Madame" by her many French students at LHS. She taught here for more than thirty years and led many student trips to France. This scholarship is awarded to students with superior achievement in French.

### **Ruth I. Brennan Memorial Scholarship Fund**

Provides scholarships to two female graduates – one each from the Wang and the Sullivan schools.

### **Charles A. and Mary Carlson Memorial Scholarship Fund**

Unrestricted.

### **Thomas F. and Eileen Casey Memorial Scholarship Fund**

Created by their children in memory of Thomas and Eileen, a LHS English teacher. This fund provides scholarships to published seniors.

### **Kimberly R. Clough Memorial Scholarship Fund**

Established in memory of a devoted LHS math teacher. Unrestricted.

### **Cobblestones/Plath Family Culinary Arts Scholarship Fund**

Created in 2004 by Kathleen and Scott Plath, owners of Cobblestones Restaurant. This scholarship is to be awarded to seniors who plan to study culinary arts or food and beverage management at a two or four year college or culinary arts institute.

### **James F. Conway, Jr. Memorial Scholarship Fund**

Established in 1992 in memory of the former CEO of Courier Corp., a 1941 LHS alumnus. This scholarship is awarded to the Valedictorian and Salutatorian of the graduating class.

### **Don Costa Memorial Scholarship Fund**

Created by Don's close working friends and crew members at the former Colonial Gas Company, the scholarship awards funds to deserving students that demonstrate need, including students of family members formerly employed by Colonial Gas.

### **Colleen Creegan Memorial Scholarship Fund**

Created by family, friends, and the community to perpetuate the memory of LHS sophomore and cheerleader Colleen Creegan. This fund awards scholarship to graduating members of the Cheerleading squad.

### **Sarah Droney-McGurrin Scholarship Fund**

Established in memory of Sarah, a 1974 LHS alumna, and awarded to students pursuing study in journalism.

### **Leo J. Farley Memorial Scholarship Fund**

Created by the family of former Lowell Mayor and LHS graduate '45 in his memory. This scholarship is awarded to average students who wish to pursue study at the University of Massachusetts Lowell. Preference is given to student athletes or student government participants.

### **Louis Fineman Memorial Scholarship Fund**

Established in memory of the late farmer, cattle broker, and founder of Pelham Bank and Trust. This scholarship is awarded to students who demonstrate outstanding work ethic in academics, school service and work in the community.

### **Leo and Matthew Flynn Memorial Scholarship Fund**

Created by the family of Leo '62 and son Matthew in their memory. This scholarship is awarded to students who demonstrate financial need, maintain a B average and participate in school or community activities and sports programs.

### **Guy Francesshelli Scholarship Fund**

Created in memory of this dedicated volunteer of the Merrimack Valley Food Bank. To be awarded to seniors who are active in community service, and plan to study computer science/information technology.

### **John J. Giblin Music Scholarship Fund**

Unrestricted.

### **Thomas J. Hogan Scholarship Fund**

This scholarship is awarded to students in the top 1/3 of the graduating class who will be attending the University of Massachusetts Boston.



**John J. and Clara M. Hurley Scholarship Fund**  
Created in memory of these beloved graduates of 1931. Both John and Clara were officers in the first chapter of the National Honor Society at LHS. John was also a Carney Medal recipient. This scholarship rewards students with academic merit demonstrating financial need.

**Henry J. Jubinville Scholarship Fund**  
This scholarship memorializes this 1930 graduate through the A.H.J. Charitable Education Trust. It is awarded to students who plan to further their education in the culture and development of the French language.

**John M. Kenney Memorial Scholarship Fund**  
Established in 2004, in memory of John, a member of the class of 1944. It is awarded to students who wish to pursue college study in accounting or business administration.

**Jack Kerouac Literature Prize Fund**  
Established by John J. Beaulieu, Class of 1938 and former teacher. This book prize is given for the best short story written by a senior.

**Jack Kerouac Scholarship Fund**  
Named after the famous Lowell native and author. Founded in 2004 with proceeds from the Jack Kerouac 5K Road Race. This scholarship is awarded to students who will pursue a career teaching English, or in creative writing, journalism or professional practice in a related field.

**Mary V. Kiafas Scholarship Fund**  
Established by Mary V. Kiafas, a 1941 LHS graduate. Unrestricted.

**William P. Kraines Memorial Scholarship Fund**  
Established in 2002 by family and friends in memory of this 1972 LHS graduate. It is awarded to seniors who demonstrate financial need and a desire to study English or the media arts in college.

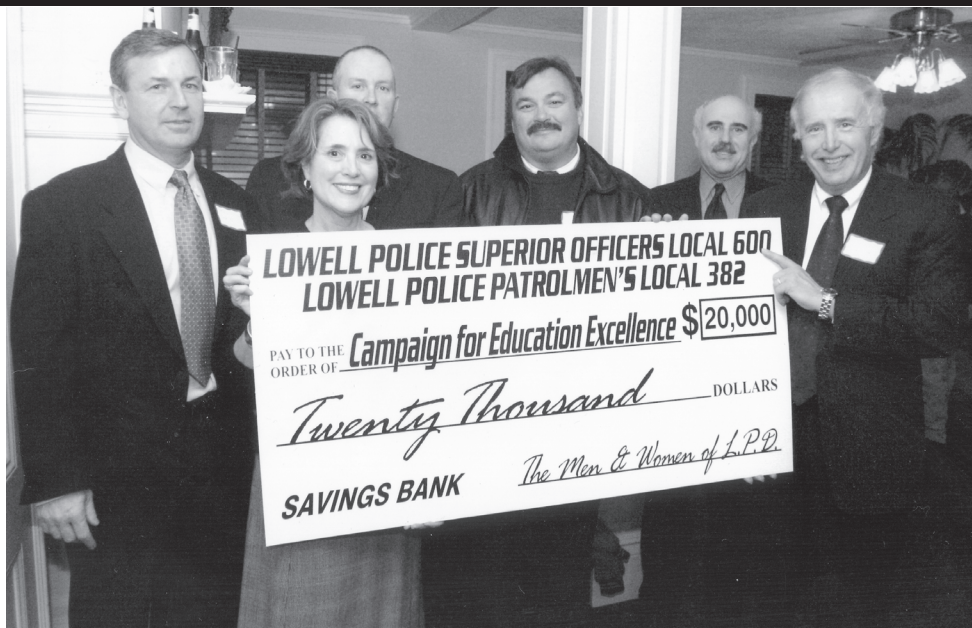
**Michael J. Kuenzler Wrestling Scholarship Fund**  
Established by this 1979 graduate and former LHS wrestling coach to be awarded to a graduating member of the wrestling team.

**Athena Letsou Science League Scholarship Fund**  
Established in 2001 by the LHS Science Club in honor of Ms. Letsou '54, who taught chemistry at Lowell High School for over 40 years. This scholarship is awarded to the senior who has contributed most to the progress of the Science League by active participation.

**Lowell High School Alumni Scholarship Fund**  
In memory of LHS alumni including Roger Lang, Jr.'36, Arthur Hammar '41, and Donald Van Greenby '41. Unrestricted.

**Lowell High School Athletic Hall of Fame Medals Fund**  
Established in 2002 by John Beaulieu, class of '38 and retired LHS teacher. This fund supports the Athletic Hall of Fame medals.

**Lowell High School Latino Scholarship Fund**  
Established in 2003 by the LHS Latino students to be awarded to students of Latino heritage who plan to attend college.



**Lowell High School Memorial Scholarship Fund**  
This scholarship honors Iris Boutselis, Andrew Cavossa, Barry F. Cronin, Christos Georgoulis, Rita P. Lamond, John P. Leary, Al Mangan, and Richard Plotzke. Unrestricted.

**Lowell High School Student Scholarship Fund**  
Unrestricted.

**Lowell Police Officer Patrick F. Leavitt Memorial Scholarship Fund**  
Established in 2004 by the Lowell Police Patrolmen's Union and Superior Officers Union in memory of Patrick Leavitt, who died in the line of duty. The scholarship will be awarded to seniors who pursue a course of study in Criminal Justice at a two- or four-year institution of higher learning.

**Lowell Police Officer George F. A. Pearsall Memorial Scholarship Fund**  
Established in 2004 by the Lowell Police Patrolmen's Union and Superior Officers Union in memory of George Pearsall who died in the line of duty. The scholarship will be awarded to seniors who pursue a course of study in Criminal Justice at a two- or four-year institution of higher learning.

**Lowell Police Officer Christos G. Rouses Memorial Scholarship Fund**  
Established in 2004 by the Lowell Police Patrolmen's Union and Superior Officers Union in memory of Christos Rouses '43, who died in the line of duty. The scholarship will be awarded to seniors who pursue a course of study in Criminal Justice at a two- or four-year institution of higher learning.

**Lowell Police Officer John Joseph Winn Memorial Scholarship Fund**  
Established in 2004 by the Lowell Police Patrolmen's Union and Superior Officers Union in memory of John Winn, who died in the line of duty. This scholarship will be awarded to seniors who pursue a course of study in Criminal Justice at a two or four year institution of higher learning.

**Lowell Police Superior Officers Association and Lowell Patrolman's Union establish and pledge \$20,000 scholarship funds to help meet the \$500,000 McCallum Family Foundation challenge grant by honoring four officers, Patrick F. Leavitt; Christos G. Rouses, George F.A. Pearsall, and John Joseph Winn, who lost their lives in the line of duty. Pictured from left: Sgt. Jack Dolan, Campaign Director Brenda Costello, Lt. James McPadden, President, Lowell Police Superior Officers Local 600; Ptl. John Boutselis, President, Lowell Police Patrolmen's Local 382, David Kronberg, and LHS Headmaster, William Samaras.**

**McCallum Family Foundation Scholarship Fund**  
Established in 2004 by Elkin '61, CEO of Joan Fabrics Corp., Donna '61, and their daughter Kerry. Elkin and Donna met at LHS and hold this institution close to their hearts. This scholarship is awarded to deserving seniors who demonstrate financial need with mid - upper academic class rank.

**Clement McDonough Memorial Fund**  
Established in memory of this former Lowell School Committee member. Book Award.

**Francis McHugh Memorial Scholarship Fund**  
Established in memory of former Lowell High School Sub-Master and History teacher. Unrestricted.

**Ryan P. McMahon Memorial Fund**  
Created by family and friends in memory of Ryan, who died while a student at St. Margaret's Elementary School in Lowell. The scholarship is to be awarded to graduating seniors who have also graduated from St. Margaret's.

**Robert Isaac Mizner Memorial Scholarship Fund**  
Established by his family in 2004, this scholarship memorializes the life of Robert Mizner, LHS Valedictorian in 1974, and honors his love of learning, particularly in mathematics and teaching, by awarding scholarships to graduates of the Latin Lyceum who wish to pursue college study in the fields of mathematics and education.

**Francis X. Moriarty Scholarship Fund**  
Created in honor of Francis Moriarty '43, former Reilly School principal. This scholarship is awarded to the top ranking graduating student in English, literature and grammar for four years at LHS, who also graduated from the Reilly School.

**Supt. Henry J. and Theresa R. Mroz Scholarship Fund**  
Established to provide a scholarship for each year in which the student pursues an undergraduate degree (not more than four years). The senior must be in the top 25% of the graduating class, must be active in school or community activities, and must submit an essay about following the golden rule – "Do unto others as you would have done unto you."

**Anna Burns Murphy Scholarship Fund**  
Created by her daughter, Joanne, to memorialize her mother's life. This scholarship will be awarded to students interested in studying business at a two- or four- year institution.

**Marie T. Murphy Scholarship Fund**  
Created by her niece, Joanne to honor Marie T. Murphy's lifetime commitment to the nursing profession. This scholarship will be awarded to students interested in studying nursing at a two- or four- year institution.

**Dennis J. and Lillian Murphy Scholarship Fund**  
In memory of Lowell residents to be used for scholarships for deserving students.

**Peter Nason Scholarship Fund**  
In memory of teacher and LHS graduate of 1967. Unrestricted.

**Walter L. Nelson Scholarship Fund**  
Established in 2003 to honor Walter Nelson '62. At LHS, he served as teacher, coach, Student Activities Director and later Athletic Director from 1997 to 2003. The fund will award scholarship to seniors who have demonstrated a record of excellence in scholarship and athletics.

**Jane G. O'Connor McCarthy Scholarship Fund**  
This scholarship will be awarded to deserving seniors interested in studying nursing. Established in recognition of her career in nursing that enabled her to support five children after her husband died at a young age.

**Dana and Elizabeth Palmer Fund**  
Established by their children Eleanor, Pete, and Hilde in memory of their father Dana Palmer, a former history teacher at LHS for 30 years, and their mother, Elizabeth. Unrestricted.

**James A. Patterson Memorial Scholarship Fund**  
Established in memory of an outstanding member of the LHS baseball and basketball teams. Mr. Patterson served during World War II under General Patton. This scholarship is awarded to serious student athletes who demonstrate financial need.

**Portuguese-American Scholarship Fund**  
Established in 2004 by Luis Pedroso '80, President of Accutronics, and Mark and Elisia (Teles) Saab '80, principals of Advanced Polymers Inc. This scholarship is awarded to students who plan to study at a two- or four- year college, with preference given, but not limited, to students of Portuguese descent.

**Brian F. Reynolds Student Athlete Scholarship Fund**  
Established by family and friends in memory of Brian '50, a football, track, and baseball player, who later graduated from Harvard College. This scholarship is awarded to students who demonstrate excellence in both scholastics and athletics.

**Dr. Joseph R. Rocha NAACP Scholarship Fund**  
Established in 2002 in memory of former UMass Lowell professor. He was also on the board of directors of the Merrimack Valley NAACP and listed in Who's Who Among Black Americans. This scholarship is awarded to students of African or African-American descent with a "B" average or above who wish to pursue a career in business through further education.

**Georgia Sarris Memorial Fund**  
In memory of a former teacher. This scholarship is to be awarded to a senior of Greek heritage, if possible, who plans to pursue a career in Education.

**Edward Everett Sawyer Scholarship fund**  
Established in memory of her father by Helen, LHS graduate in 1921. Mr. Sawyer was a LHS Carney Medalist in 1878 and Union National Bank Vice President. Unrestricted.

**Thomas "Tiny" Sheehan Scholarship Fund**  
Established in memory of "Tiny" Sheehan '61. This scholarship is awarded to graduates who demonstrate a need for economic support to pursue further education at a college or vocational training school and have distinguished themselves through varsity sports.

**Frederick Slavin Track Scholarship Fund**

This scholarship is to be awarded to students who participated on the track team.

**Linda A. Sousa Scholarship Fund**

Established in memory of Linda who graduated from LHS in 1995. Unrestricted.

**Peter S. Stamas Scholarship Fund**

Established by former LHS Headmaster, educator and community leader, Peter Stamas, along with his family, friends, and professional associates. Scholarships shall be awarded to seniors who have demonstrated excellence in scholarship, community service, and participation in school activities.

**Sullivan Middle School Scholarship Fund**

Created by the Sullivan Middle School PTO. The scholarship will be awarded to LHS graduates who have also graduated from the Sullivan Middle School. The elements used to determine the recipients in priority order are: need, scholarship, character, community service, and participation in school activities.

**Brian P. Sullivan Memorial Scholarship**

This scholarship honors Mr. Sullivan, who graduated from LHS in 1979. It will be awarded to students demonstrating financial need.

**Dr. Joseph D. Sweeney Science Award**

This award was established by Dr. and Mrs. William E. Sweeney in memory of his father, Dr. Joseph D. Sweeney '22, former Chief of Surgery and Chief of Staff of St. John's Hospital (now Saints Memorial Medical Center). The recipients of this scholarship must display proven abilities, and intend to pursue a career in the field of science.

**Gertrude J. Thomas Memorial Scholarship**

Established in memory of a former LHS biology teacher and guidance counselor. The scholarship is to be awarded to students in the top 5% of the class who plan to study biology, nursing, or education in college.

**B. Douglas Townshend Choral Arts Scholarship Fund**

This scholarship was initially established with proceeds from a program titled "Mr. Townshend's Legacy". The fund was established honoring the longtime LHS Choral Arts Director and is given to seniors who are members in good standing in one of the performing groups of the Choral Arts Department during both junior and senior years at LHS. The students must pursue study in music or performing arts as a major in college.

**Ellenor T. Trull Scholarship Fund**

This scholarship honors this 1924 Carney Medal winner and longtime Lowell resident. It is awarded to students pursuing studies in art.

**George T. Tsapatsaris Scholarship Fund**

Established by the Alpha Epsilon Phi Fraternity of Lowell in honor of George Tsapatsaris, former Superintendent of Lowell Public Schools. The purpose of the

fund is to provide scholarships to LHS graduates who have also graduated from the Bartlett School in Lowell, Massachusetts. The students should pursue a degree from a four year institution, show financial need, good scholarship record and character, community work or work experience, and extracurricular activities.

**Katina Pappas Tsongas Scholarship Fund**

Created by the late U.S. Senator and 1992 Democratic Presidential candidate, Paul Tsongas, a graduate of LHS in 1958. This fund honors his mother, who died in his childhood. This scholarship is open to female residents of Lowell, MA, only and will be awarded to the winner of an essay contest on women's issues.

**United American Energy Scholarship Fund**

The UAE scholarship will be awarded to students pursuing a degree in science.

**William Woodcock Scholarship Fund**

Unrestricted.

**Zaher-Lacouture-Galotta Family Scholarship Fund**

Established in memory of the donors' father, Lewis Zaher; their mother, Naeema Saab Zaher; their brother, Thomas Zaher; and Edward John Galotta. The purpose of the fund is to provide scholarships to students of Syrian or Lebanese descent.

**Cassie Zousoumas Memorial Scholarship Fund**

Established in 2003 in memory of Cassie, a student at the Shaughnessy Elementary School. The scholarship is awarded to students who wish to pursue college study and a career in special education, or physical, occupational, or speech therapy.

**Class of 1946 Scholarship Fund**

Unrestricted.

**Class of 1948 Scholarship Fund**

Unrestricted.

**Class of 1952 Scholarship Fund**

Unrestricted.

**Class of 1959 Scholarship Fund**

Unrestricted.

**Class of 1960 Scholarship Fund**

Unrestricted.

**Class of 1973 Scholarship Fund**

Unrestricted.



# Why Use the Community Foundation

The Greater Lowell Community Foundation is for large and small donors alike. Your gift can significantly impact community problems, because each gift is combined with others to enable us to respond quickly and effectively to changing community needs. When you contribute a gift of any size, you are rewarded with the following benefits:

**1. Permanence: Your Gift Will Keep Giving.** The Greater Lowell Community Foundation's most important asset is its stability. You are assured of security since the Foundation exists as a permanent bank of funds for charitable purposes – a community savings account making sure your gift will do good work now and in the future. The Community Foundation honors and protects the charitable intentions of its donors in perpetuity.

**2. Flexibility: Your Gift May Be Designated for a Specific Purpose.** If you establish your own fund, you may choose its purpose or purposes. You can name the specific organizations, types of charities, or general causes that you want your money to impact.

**3. Relevance: Your Gift Will Meet Changing Community Needs.** Many donors do not place restrictions on how their funds are to be used, leaving decisions to the Community Foundation's governing body. This way, your gift will never be out of date. Even if the intended purposes of your gift become obsolete, the Foundation will ensure that the fund will meet future needs.

**4. Commemoration or Anonymity: Gifts Can Honor a Loved One or Be Kept Anonymous.** The Community Foundation honors and protects your preferences. Grants from your fund will always be recorded according to your wishes, a lasting symbol of your caring. Such funds may be increased at any time by additional gifts.

**5. Tax Advantage: Contributions Will Ease Your Tax Burden and Supply Financial Benefits.** By planning your giving to take the projected financial needs of you and your family into consideration, you may be able to increase the amount of your gift while achieving greater tax savings and/or income for yourself or your loved ones. Contributions to the Community Foundation qualify for maximum deductibility for income, gift, and estate

tax purposes. Those who create endowed funds, charitable remainder trusts, or gift annuities receive a charitable tax deduction in the year the gift is given and may suggest distributions from the fund over a longer period of time.

**6. Experienced Investment and Grant Management: Your Fund Will Be Professionally Supervised.** The Community Foundation's Directors, Investment Committee, professional staff, and investment managers provide prudent stewardship of donor funds. Most gifts to the Foundation are pooled for investment purposes, so you can enjoy the advantages of a fully diversified portfolio. Grants are managed according to established best practices.

**7. Convenience: You Can Take Advantage of "One-Stop Giving."** The Community Foundation affords you the benefits of having your own separate fund, a "foundation within the Foundation" that is simple and convenient, but without the customary burdens and expenses. The Community Foundation can handle all of your charitable goals with very little work on your part. The Community Foundation provides award letters, record keeping, investing, and annual reporting through an independent audit, and you receive quarterly reports on the progress of your fund.

# Ways to Give

Your gift to the Greater Lowell Community Foundation can take a variety of forms. We are always available to assist you in choosing the ways you may want to give.

## Cash

The simplest gift is often cash or a check.

## Appreciated Securities and Closely Held Stock

A gift of appreciated stock receives an income tax deduction equal to its current market value, and there is no capital gains tax when stock is transferred.

## Bequests

One of the simplest ways to make a planned gift is to incorporate a statement in your will that a share of your estate, after providing for family and loved ones, shall be distributed to the Community Foundation for the purpose that you name.

## Real Estate

Contributions of a house or property, in whole or in part, can provide the perfect opportunity to make a substantial gift, conserve parcels of land, preserve historic properties, or meet other personal and social goals. Donors can even continue to live in their homes through a Retained Life Estate, or receive income for life.

## Life Insurance

By assigning a life insurance policy to the Community Foundation as owner and beneficiary, a donor's premiums are tax-deductible. When the policy is redeemed, a permanent fund is created to support the charitable goals described by the donor. Paid up life insurance can be converted into a charitable legacy through which your heirs can perpetuate your philanthropic interests.

## Assets of a Private Foundation

When merging into a Community Foundation donor-advised fund or supporting organization, family foundations can retain all the essential prerogatives of their private foundations while being relieved of regulatory, administrative, and excise tax burdens.

## IRAs, 401ks, or Other Deferred Contribution Plans

Naming the Community Foundation as the beneficiary of an Individual Retirement Account or similar plans can be a tax-effective contribution that will lessen the impact of income, estate, and generation-skipping taxes on a family's inheritance by removing the asset from the donor's estate.

## A Gift From Your Company or Corporation

Corporate giving endowments and annual charitable projects can be administered through a Community Foundation donor-advised fund, providing professional fund management and a positive profile for the company at low cost.

**Peter S. Stamas' legacy lives on, both through his extended family and through two permanent funds at GLCF. The Peter S. Stamas Scholarship Fund was established at his retirement by his friends and professional associates in the Lowell School System. After Peter died, his sister Athena Stamatakakos established the Peter S. Stamas Fund for the Greater Lowell Community Foundation to support all the Foundation's efforts this year and every year.**

**Seated left: Harry J. Ostis; Athena Stamatakakos; Stella Ostis; Lauren Ostis. Standing first row left: Eugenia Ostis Funaro; Nicholas Ostis; Nicole Stamas; Alexandra Stamas; Freeda Ostis; Steven G. Bates; Michael Funaro and Demetra Blanchard. Last row left: James Ostis; William J. Ostis; Timothy J. Ostis; and Steven J. Ostis. Peter S. Stamas was a founding Director and first Treasurer of the Community Foundation and one of Lowell's great community leaders.**



# Giving Now or Planning Your Gift For Later

Many people make their gifts in the form of a bequest. However, others prefer the personal satisfaction of establishing a fund now and seeing their charitable dollars at work. We want to assist you as you consider the best way to formulate a charitable fund program that addresses your personal financial situation and takes full advantage of opportunities for income enhancements and tax deductions.

For example, if current income for one or more family members is a concern to you as you formulate your charitable plans, you may be interested in:

**A Charitable Remainder Trust** – Cash, securities, or other assets are transferred to a trust created by the donor. The trust pays the donor (or other designated beneficiaries) a fixed or variable income for life or a designated period. Upon the deaths of the beneficiaries or conclusion of the payment period, the remainder of the assets is distributed to the Community Foundation to create a permanent fund or other mechanism to support the charitable purposes stated by the donor. A charitable remainder trust is ideal for those who would like to convert appreciated, but low-yielding, assets into substantially increased annual income while avoiding capital gains taxes and minimizing estate taxes for their heirs.

**Charitable Gift Annuity** – Gift annuities provide a less complicated alternative to remainder trusts. At the Greater Lowell Community Foundation, an annuity can be created with a simple contract and a minimum contribution of \$10,000. Unlike a conventional annuity, the donor receives considerable tax advantages, and at the end of the term, the remainder is transferred to the donor's chosen fund at the Community Foundation, supporting the donor's designated charities in perpetuity.

**Life Insurance** – A donor can deduct insurance premiums by assigning a life insurance policy to the Community Foundation as owner and beneficiary. When the policy is redeemed, a permanent fund is created to support the donor's charitable

## Getting Started

Once you've defined your charitable goals, we are ready to help you design a fund that meets your needs. You can access to the Community Foundation's professional staff and advisors by contacting

The Greater Lowell Community Foundation  
169 Merrimack Street, 5th Floor  
Lowell, MA 01852  
Tel: 978-970-1600  
E-mail: dave.glcfc@verizon.net  
janinne.glcfc2@verizon.net

or  
on the web at  
[www.glcfcfoundation.org](http://www.glcfcfoundation.org)

## Minimum Contributions to Start

A family, individual, or corporation may establish a named fund with a gift of cash, securities, or other property valued at a minimum of \$5,000, or start with \$1,000 that accrues to \$5,000 within a five-year period.



# How to Design Your Own Fund

Selecting the type of fund that best suits your needs is the first step in gift planning. It enables you to receive the greatest income and tax benefits, while maximizing the impact of your charitable contribution. You may create a fund with a one-time current gift or deferred gift, or with an initial gift to which you may continue to add later. Many people like the idea of establishing a fund that can carry the name of their family or of a loved one forever.

Funds that can be established at the Greater Lowell Community Foundation include:

## **Discretionary Fund**

These funds are the backbone of the Greater Lowell Community Foundation because they allow us to attack new, unforeseen challenges and react to fiscal emergencies facing vital and long-established nonprofit agencies. Under this arrangement, you entrust the allocation of your funds to the thoughtful judgment of civic leaders who comprise the Foundation's Board of Directors. Your name goes on forever as grants are awarded or you can give to our Founders Discretionary Fund.

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This fund meets your personal philanthropic goals if you have had a lifelong commitment to one or more particular areas of concern that you wish to continue to support in perpetuity. For example, funds can benefit a specific town's civic activities, the arts, economic development, youth services, the environment, or any other field of interest.

## **Donor-Advised Fund**

Many donors who wish to be active participants in philanthropy prefer this arrangement. As a donor-advisor, you may make grant recommendations from your fund during your lifetime. Funds are distributed upon ratification of the Community Foundation's Board of Directors.

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This fund offers you the opportunity to honor or commemorate a family member or friend, to serve a specific purpose important to you, or support a cause in which your loved one deeply believed.

## **Agency Endowment Fund**

This fund is offered to nonprofit organizations to help preserve the future of their services and serve as a convenient receptacle for bequests or large gifts that donors feel uncomfortable giving for the agencies' operating purposes. Many people find this has the added benefit of ensuring that their favorite charitable organization's services and programs remain constant in our community. Ongoing technical assistance is provided by staff at the Community Foundation to help the organizations build their endowments.

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