



Annual Report  
to the Community  
October 2005

# Permanent Resources, New Solutions,



## Lasting Impact





# Dedication to Founding President, Richard K. Donahue, Sr.

We dedicate this report to Richard K. Donahue, Sr., the founding president of the Greater Lowell Community Foundation, whose seven-year term has concluded with the election of George L. Duncan as his successor.

As one of the philanthropic leaders of Lowell, Dick Donahue has had a profound positive impact upon Lowell for many years. When the Foundation elected Dick Donahue as its founding president, they acquired a leader who knew Lowell and its nonprofit infrastructure intimately, and whose vision of what Lowell is and could be served as a guidestar to the entire organization.

Dick's leadership has always been respectful of the interests, energies and capacities of others. He created an environment for creativity and innovation, where new ideas were both welcomed and inspired. Dick has been both generous and personally creative of new funds that now provide continual financial support to a score of endowment initiatives and dozens of nonprofit organizations supporting social services, the arts, women's issues, and the environment.

Dick's accomplishments in government, industry, and philanthropy, as a member of the Kennedy White House, as chairman of Nike, and as trustee of the John F. Kennedy Presidential Library and Joyce Foundation, have given the Community Foundation a substantial knowledge base. His wisdom and experience throughout his tenure have helped the Community Foundation attain a level of excellence that is recognized locally, statewide and across the nation.

Thank you, Mr. Donahue. Your mark is deep and enduring, your presence commanding, and your commitments, thoughtful. We dedicate this 2005 annual report to you.

## Theodore Edson Parker Foundation

We also wish to express our gratitude to the Theodore Edson Parker Foundation for helping establish the Community Foundation. President Newell Flather, Administrator Philip Hall, and Trustees Karen Carpenter, Thomas Leggat, and Andrew Bailey have shepherded the Parker Foundation's grant making during the Community Foundation's inception and growth. The Parker Foundation's early support during our formative years culminated in a \$1.5 million gift from its own endowment principal, which in turn generated an additional \$4 million of matching endowment gifts from more than three hundred additional sources.

Starting with Trustee Karen Carpenter's feasibility study in 1997 and boosted by Parker's seed operating grants for several years thereafter, the Community Foundation gained solid footing for the success we enjoy today. The Parker Foundation gift has also created a discretionary fund that enables the Community Foundation to respond to any current and changing needs and priorities in the future. The Greater Lowell Community Foundation is deeply grateful for the leadership of the Parker Foundation.

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# New Leadership, Enduring Commitments

We are delighted to present the 2005 Annual Report of the Greater Lowell Community Foundation.

The Greater Lowell Community Foundation is a unique charitable resource for the region. Prior to the formation of the Community Foundation, much of the accumulated capital and donated wealth in the Merrimack and Nashoba Valleys left the area, never to return to be invested. The Greater Lowell Community Foundation is reversing this trend by inspiring donors of all kinds to create new charitable capital, which generates much-needed support for community and civic activities. Just as important, the Foundation is active throughout the year, bringing people together to share knowledge and address critical needs and issues through targeted initiatives that improve the quality of our lives.

This report provides a brief retrospective of our recent accomplishments and describes how individuals, families and institutions in our community have used and can use the Community Foundation to enhance their own personal and community goals.

We invite you to work with us to create your own legacy that reflects your vision, values, and commitments. By doing so, we can create a strong foundation for community progress that will extend far into the future, a progress that is rooted deeply within the lives of people today.



Kevin Harkins

Executive Director David Kronberg (standing) and President George L. Duncan



Kevin Harkins

Seated from left: Richard K. Donahue, Sr.; Lura Smith; George L. Duncan, President;  
Standing from left: David Kronberg, Executive Director; Luis Pedroso; James C. Shannon III, CPA, Treasurer; Jacqueline F. Moloney, Ed.D.; James H. Reichheld, M.D. (not pictured, Chester G. Atkins)



Robert A. Caruso



Atty. Annemarie Roark,  
Secretary



James F. Conway III,  
Vice President



Brian J. Stafford, CPA,  
MST, Assistant Treasurer



Kay Doyle, Ph.D.



Winslow H. Duke



Arnold S. Lerner



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# What is the Greater Lowell Community Foundation?

Since its inception in 1997, the Greater Lowell Community Foundation has grown rapidly as a community resource, connecting donors of all types with organizations, resources, and other donors to improve our quality of life. The Foundation's primary goal is to assist these generous and community-minded donors to create permanent endowment funds and scholarships. In addition, the Foundation manages the distribution of grants from these funds, develops special short-term projects, and convenes individuals and institutions to address community issues.

Our community service focuses on residents and communities in twenty municipalities in the Northern Middlesex, Greater Lowell, Nashoba Valley, and Merrimack Valley regions. These communities are Ashby, Ayer, Bedford, Billerica, Burlington, Carlisle, Chelmsford, Concord, Dracut, Dunstable, Groton, Littleton, Lowell, Pepperell, Shirley, Tewksbury, Townsend, Tyngsboro, Westford, and Wilmington.

To preserve the long-term viability of its charitable capital, the Foundation pools its investments, closely tracks its charitable funds, and ensures that the portfolios of charitable investments are both well diversified, and regularly rebalanced by asset allocation. By this means, the Foundation maximizes performance while achieving risk-averse growth for future grant making and community services.

Our donors come from all walks of life and financial capacities. They consist of individuals, families, groups of friends, nonprofit organizations, public agencies, foundations, and corporations. Currently the Foundation's portfolios of charitable endowments and scholarships number 193, with assets exceeding \$11 million. Since 1997, the Foundation and its donors have awarded more than \$2.5 million in scholarships to high school students, in grants to strengthen the organizational capacity of nonprofit groups, in distributions from endowment funds established exclusively for or by nonprofit agencies, and in donor-advised gifts to charitable organizations.



Nonprofit agency representative James Wilde, Director of Merrimack Valley Housing Partnership discusses organizational capacity grant. From left: Sharon Shelton from Community Teamwork, Inc., James Wilde, and T.C. Breazeale of LifeLinks receive grants at this year's *Celebrate Giving!* 9th Annual Philanthropy Day Conference.

## Our Mission Statement

The mission of the Greater Lowell Community Foundation is to improve the quality of life in the area. The Foundation is a community resource, which attracts funds, distributes grants, makes loans, and serves as catalyst and leader among funders, agencies, and individuals to address identified and emerging needs. The Community Foundation is a professional, compassionate steward of its donor funds and builds upon the creative vision of its founders and the community.

# 2005 *Celebrate Giving!* 9th Annual Philanthropy Day Conference

*Celebrate Giving!* the Community Foundation's Annual Philanthropy Day Conference, is the region's most significant charitable learning event. Nationally respected thinkers, civic leaders, philanthropists, nonprofit professionals, and local community residents from across the region discuss leading-edge issues and opportunities for civic engagement, community philanthropy, volunteerism and charitable giving.

## Keynote Speakers



**Dr. Claire Gaudiani,**  
Professor at The George H. Heyman, Jr. Center for Philanthropy and Fundraising at New York University, former President of Connecticut College and author of *The Greater Good*. Dr. Gaudiani gave a provocative and inspiring keynote address, revealing how philanthropy has defined and enriched American society from the inception of our nation to the present day.



**Dr. Paul Schervish,**  
Professor of Sociology, Director of the Center on Wealth and Philanthropy at Boston College. He is co-author of *Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy*, which has changed the way financial institutions and people think about the field of philanthropy. His presentation outlined the exciting opportunities and challenges presented by the phenomenon of large-scale wealth transfer already underway.

## Volunteer Awards



Mehmed Ali, Chairman of the Foundation's Volunteer Awards Committee presented Cisco Systems the Corporate Volunteer of the Year Award for its outstanding community involvement and philanthropy world wide. Sybille Grey, a Cisco employee, accepted the award.



**Youth Volunteer Award Winner**  
Kristina Aste graduated from Lowell Catholic High in June, 2005. During her high school years Kristina was an active leader in a number of community service projects.

## Nonprofit Agency Exhibits



The Merrimack Valley Food Bank was among twenty-four organizations that prepared tabletop exhibits to recruit volunteers and educate *Celebrate Giving!* attendees about their services and needs.

Photos by Paul Scalera

# Program Highlights:

## **Richard P. Coughlin**

*CEO of Lowell Co-operative Bank, Presenter, and One of the Sponsors of the 2005 Bankers Volunteer Award.*

"Bankers in our area take special pride in celebrating the volunteer leadership of local residents and customers. These individuals of course are far from ordinary; they inspire us all to make a difference, and as such are real champions in our community."

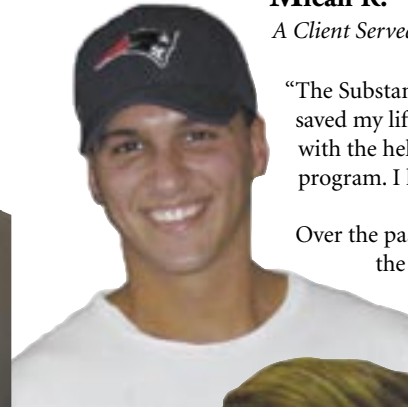


## **Micah R.**

*A Client Served by the Substance Abuse Diversion Initiative*

"The Substance Abuse Diversion Initiative in Lowell (SADIL) saved my life. I had been trying to get into detox to no avail, but with the help of Pete MacNeil at SADIL, I got into a long-term program. I have been sober almost six months now."

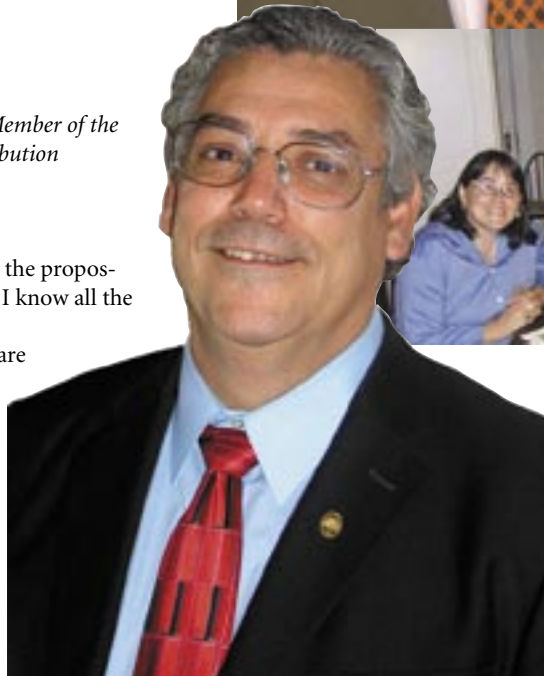
Over the past year, a partnership comprised of Lowell House, the Lowell Police Department and the Community Foundation has put this innovative substance abuse treatment program at the front line of treating addiction in the city.



## **Francisco Carvalho**

*Tyngsboro Resident and Member of the Foundation's Grant Distribution Committee.*

"I take my responsibility seriously in evaluating all the proposals submitted for review. I know all the other members of the Distribution Committee are dedicated to competitive grant awards as an effective way to help the nonprofit field make a difference in our communities."



## **Alfred H. Coburn**

*Creator of the Alfred H. and Kathryn E. Coburn Park Fund, center pictured with Jane Calvin and Henri Marchand of Lowell Parks and Conservation Trust (LPCT).*

"My crowning achievement on behalf of my wife and my family name is to create a beautiful park everyone can enjoy for ages to come." The Coburn Park Fund will provide capital and annual maintenance support to the Lowell Parks and Recreation Department through the nonprofit LPCT.



## **Amsi Y. Morales-Lopez**

*UMass Lowell Undergraduate Who Created a Lowell High School Scholarship Fund.*

"It has always been my dream to establish a scholarship for fellow Hispanic students to pursue business studies."

Amsi's scholarship was one of more than a dozen endowed funds that matched the McCallum Family Foundation's million-dollar challenge, achieving a significant benchmark of the five-year, \$5 million scholarship endowment goal of Lowell High School's Campaign for Educational Excellence.



# A Pictorial Retrospective

## Fiscal Agency Services

### Community Health Network Alliance 15

Members of the Northwest Suburban Health Alliance (Community Health Network Alliance 15) evaluate new grant and program initiatives. CHNA 15 focuses on projects that build healthier communities through community-based prevention planning and health promotion. The Alliance, for which the Community Foundation provides fiscal agency services, is a local coalition of public and nonprofit agencies and interested citizens that serve residents in Acton, Bedford, Boxborough, Carlisle, Concord, Lexington, Lincoln, Littleton, Wilmington, Winchester, and Woburn.



*Created by the Massachusetts Department of Public Health, the Northwest Suburban Health Alliance is one of 22 Community Health Network Alliances in the Commonwealth.*

### EdVestors in Lowell

The Lowell public school system has become a magnet for inventive curriculum development, thanks to EdVestors, a Boston-based funding venture devoted to educational innovation. EdVestors has invested in two Lowell projects for which the Community Foundation serves as fiscal agent: the Math Brigade and the Lowell High School Arts Academy.

## Endowing Community Change

### Women Working Wonders Fund

The founders of the Women Working Wonders Fund are working together to create a permanent funding source for opportunities and initiatives for women and girls in our community. The founders look forward to its continued growth and welcome all interested women to the cause. The Fund is becoming a significant force, attracting philanthropically committed women.



*Some Founders of the Women Working Wonders Fund (Founders Circle open until December 31, 2005)*

## Building Nonprofit Capacity

### Nonprofit Alliance of Greater Lowell (NPA) and Massachusetts Nonprofit Strategy Group

The Community Foundation actively participates in and financially supports the efforts of the Nonprofit Alliance of Greater Lowell, Lowell's association of nonprofit groups, and a separate statewide effort, called the Nonprofit Strategy Group, to create a unified voice for nonprofits in Lowell and throughout the Commonwealth.

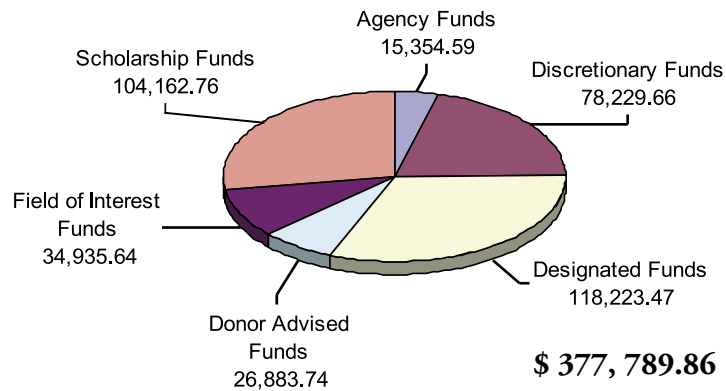


### Peer Training Series for Executive Directors

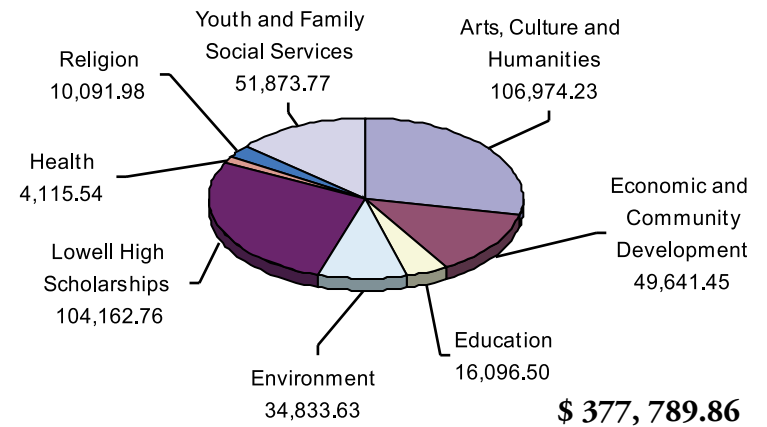
Funded by a grant from Associated Grant Makers to Management Consulting Services, which provided trainer/facilitators, twenty executive directors from throughout the Community Foundation's service area participated in peer-to-peer learning seminars. Extending over a four-month period, subject areas included board development, fundraising, strategic planning and personnel issues.

# 2005 Grants, Distributions and Scholarships

## Source of Grants 2005



## Grant Distributions 2005



### Discretionary Funds \$78,229.66 (For Nonprofit Capacity Building)

#### Arts, Culture and Humanities

Arts League of Lowell  
Brush Art Gallery & Studios  
Groton Historical Society  
New England Quilt Museum  
Revolving Museum  
Townsend Historical Society  
Whistler House Museum of Art

#### Economic and Community Development

Coalition for a Better Acre  
Greater Lowell Community Foundation  
Lowell Wish Project  
Roudenbush Community Center

#### Environment

Nashua River Watershed Association  
Shawsheen River Watershed Association  
Thoreau Farm Trust

#### Health

Latin American Health Institute



Latin American Health Institute opened their new offices in Lowell with office equipment awarded as a capacity grant in 2005.

#### Youth and Family Social Services

Boys & Girls Club of Greater Billerica  
Boys & Girls Club of Greater Lowell  
Cambodian American League of Lowell  
Challenge Unlimited at Ironstone Farm  
Friends of the Lowell Council on Aging

Girls Incorporated of Greater Lowell  
House of Hope  
International Institute of Lowell  
Jericho Road Project  
LifeLinks, Inc.  
Merrimack Valley Catholic Charities  
Merrimack Valley Food Bank  
Open Pantry of Greater Lowell  
Tewksbury Hospital Equestrian FARM  
United Teen Equality Center  
Wilmington Family Counseling Service  
Youth Enhancement Services  
YWCA of Greater Lowell

#### Economic and Community Development

Greater Lowell Community Foundation

### Field of Interest Funds \$34,935.64

#### Arts, Culture and Humanities

Cultural Organization of Lowell  
Lowell Festival Foundation  
Revolving Museum



## **Economic and Community Development**

Lowell Plan  
Pawtucketville Citizens Council  
People Helping People

## **Education**

Lowell Catholic High School  
Pollard Memorial Library Foundation

## **Environment**

Friends of the Forest  
Lowell Parks & Conservation Trust  
Massachusetts Audubon Society  
Merrimack River Watershed Council  
Nashua River Watershed Association  
Shawsheen River Watershed Association

## **Health**

Lowell Community Health Center

## **Youth and Family Social Services**

Community Teamwork - Healthy Summers  
Program  
Community Teamwork - CTI Advocacy  
Girls Incorporated of Greater Lowell  
Lowell Transitional Living Center  
St. Julie Asian Center

## **Agency Funds \$15,354.59**

(All agencies other than those listed below  
reinvested their distribution)

## **Arts, Culture and Humanities**

International Institute of Lowell  
Lowell Historical Society  
Merrimack Repertory Theatre  
New England Quilt Museum  
Whistler House Museum of Art

## **Designated Funds \$118,223.47**

## **Arts, Culture and Humanities**

American Textile History Museum

Merrimack Repertory Theatre  
New England Quilt Museum  
Revolving Museum  
Whistler House Museum of Art

## **Economic and Community Development**

Forge Village Improvement Association  
Greater Lowell Community Foundation  
Tufts University New Entry Sustainable  
Farming Project

## **Education**

Bishop Guertin High School  
Lowell Catholic High School  
Pepperell Lawrence Library  
Tufts University  
Winter Guard International

## **Environment**

Dracut Land Trust, Inc.  
Lowell Parks & Conservation Trust  
New England Forestry Foundation  
Thoreau Farm Trust

## **Religion**

First Church of Christ (Unitarian)  
Oblate Mission Guild

## **Youth and Family Social Services**

Challenge Unlimited at Ironstone Farm  
LifeLinks, Inc.  
Retarded Adults Rehabilitation Association

## **Donor Advised Funds \$26,883.74**

## **Arts, Culture and Humanities**

Angkor Dance Troupe  
Bedford Historical Society  
Charles River Museum of Industry  
Greater Boston Youth Symphony Orchestras  
Merrimack Repertory Theatre  
Revolving Museum  
Rochester Area Community Foundation

## **Economic and Community Development**

Andover Village Improvement Society  
Center City Committee  
Greater Lowell Community Foundation  
Lowell Heritage Partnership

## **Education**

Citizens Scholarship Foundation of Bedford  
College of Santa Fe  
Harvard Business School Fund  
Hawken School  
Lowell Catholic High School  
Merrimack College - Friends of Merrimack  
University of Chicago - Mathematics  
Department  
Western Reserve Academy  
WGBH Educational Foundation  
Yale University - Alumni Fund

## **Environment**

Nature Conservancy

## **Health**

Adolescent Consultation Services  
Elhers - Danlos National Foundation  
Lowell General Hospital Cancer Center  
Visiting Nurse Association of Greater Lowell

## **Religion**

St. Benedict's Priory

## **Youth and Family Social Services**

Chelmsford Community Exchange  
Community Legal Services & Counseling  
Center  
Girls Incorporated of Greater Lowell  
Intrepid Foundation  
Merrimack Valley Food Bank  
Open Pantry of Greater Lowell  
United Way of Merrimack Valley

## **Scholarship Funds \$104,162.76**

*Scholarships were awarded from seventy-five funds to  
ninety-six students, ninety-three of whom attended  
Lowell High School.*

# How to Apply for Organizational Capacity Building and Water Resources Grants



Grantees gather to receive organizational capacity and water resources grants at the 2005 *Celebrate Giving!* Conference. Thirty-one capacity grant proposals were funded, for a total of \$68,698, while nine water resource grants were awarded, for a total of \$13,935.

Both the Foundation's discretionary funds, which are focused on capacity building, and its three water resources funds are awarded on a competitive basis.

The capacity grant program is 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

mergers, small equipment purchase, and other projects that increase organizational capacity. Water resource grants are available to projects which protect, conserve, and improve three watershed areas in the region: the Nashua River watershed; the Sudbury-Assabet-Concord River watershed; and the Merrimack River watersheds in Northern Middlesex County.

The application deadline is the last business day falling on or before March 15th. All grant award winners are announced at the annual "*Celebrate Giving*" event in the spring. Applications and guidelines are available on our website ([www.glcfoundation.org](http://www.glcfoundation.org)) from January through March of each year. In addition, past grantees and their projects are also listed on the website.

The Greater Lowell Community Foundation funds nonprofit organizations serving the following communities:

• Ashby • Ayer • Bedford • Billerica • Burlington  
• Carlisle • Chelmsford • Concord • Dracut  
• Dunstable • Groton • Littleton • Lowell  
• Pepperell • Shirley • Tewksbury • Townsend  
• Tyngsboro • Westford • Wilmington.

Your nonprofit must be a 501(c)(3) tax-exempt organization and not a private foundation under the Internal Revenue Code.

Applicants that are not 501(c)(3) organizations must secure a commitment from a financial sponsor/fiscal agent that it is a 501(c)(3) organization to take on fiduciary responsibilities in connection with this grant.

The grantee and its fiscal agent must endorse a policy of non-discrimination and meet all other application criteria.

# You Can Make the Difference!

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:

## Personalized service.

The Community Foundation offers you superior philanthropic services because we make giving easy, flexible, and effective, accepting a wide variety of gifts and providing donors the greatest flexibility, including anonymity if requested. You can contribute cash, stocks, property, and bequests. We'll help you establish a fund in your name or in the name of a loved one. Your work can be accomplished quietly through us, or we can help promote the work of your legacy and your good name. (See "How to Design your Fund" on page 12)

## 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 the areas you care about most.

## 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, to empower nonprofit organizations to meet vital community needs, and to strengthen our connections with each other to address current concerns.

- We are a **local organization** with deep roots in the community.
- **Our Scholarship, Donor-Advised, Designated and Field of Interest 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.

New Entry Sustainable Farming Project



# 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, a gift from your estate, or with an initial gift to which you may continue to add later. Gifts can be designed to provide donors a supplemental source of lifetime income while supporting nonprofit groups, scholarships or other activities at the same time or later.

Many people memorialize or commemorate a family member or friend, through naming a fund in their honor. The following funds that can be established at the Greater Lowell Community Foundation include:

## Discretionary Fund

No matter what issue, crises, or opportunity comes to the fore in our region, whether in 2005, 2055 or 2105, the Community Foundation will have funds that can provide practical and imaginative solutions. These funds are the backbone of the Greater Lowell Community Foundation because they allow us to tackle unforeseen community challenges in the future, and address vital needs of nonprofit agencies. The allocation of funds is entrusted to the thoughtful judgment of civic leaders who comprise the Foundation's Board of Directors and its Distribution Committee. The Foundation welcomes your own named fund as a flexible and dynamic way to address community needs.

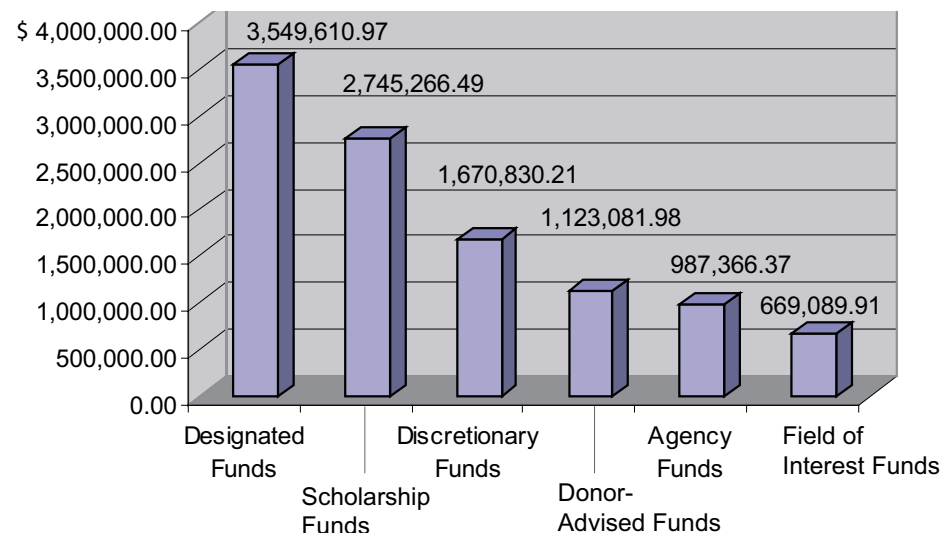
## Field of Interest Fund

These funds address 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, women's issues or any other field of interest. Only nonprofits addressing these specific fields of interest are eligible to receive grant awards to advance solutions.

## 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, and appoint successor advisors. The Community Foundation's Board of Directors distributes funds upon ratification.

Funds by Asset Size



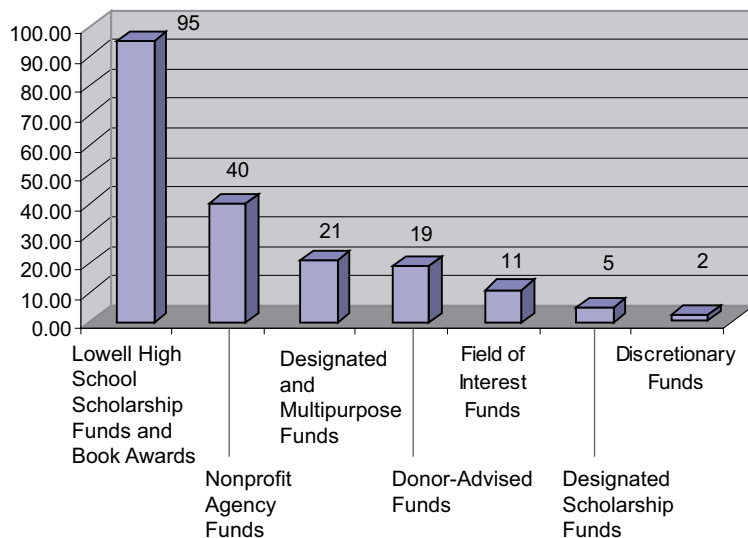
## Nonprofit Agency Endowment Fund

This fund assures annual unrestricted operating support to nonprofit organizations or supports specific areas of a nonprofit's activities or budgetary line items of interest to the donor to help preserve the future of the nonprofit agency's mission. The agency fund attracts bequests or large gifts for continual support to the nonprofit agency. Many people find this has the added benefit of ensuring that their favorite charitable organization's services and programs remain constant in our community. Staff at the Community Foundation help nonprofit agencies build their endowments through planned giving and other development assistance.

## Scholarship Funds

Scholarship funds offer opportunities to allow others to achieve their educational dreams. You may establish criteria such as academic excellence, financial need, community service, or target any specific field of study or extracurricular activity. While the Community Foundation manages most of Lowell High School's permanent scholarships, any scholarship can benefit any public or private high school.

Number of Funds by Fund Type



## Designated and Multipurpose Funds

Designated funds provide “one-stop” endowment shopping to include all the charitable, religious, educational and other legacy interests of donors. Annual distributions are sent to each of the charities identified by the donor thereby converting annual gifts into perpetual support for the institutions they value most.

## Discretionary Funds

*Enable the Community Foundation to respond to current and changing needs now and in the future*

Founders Discretionary Fund

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

## Field of Interest Funds

*Support a variety of agencies and programs with the goal of addressing specific concerns*

Bankers Volunteer of the Year Award Fund  
Community Impact – Social Services Fund  
Greater Merrimack Valley Arts Fund  
Lowell United Development Fund  
Nancy L. Donahue Public Arts Fund for Lowell  
Nicholas Fund for the Prevention of Domestic Violence  
Northern Middlesex Water Resources Endowment

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

Youth Development Fund  
Women Working Wonders Fund

## Nonprofit Agency Funds

*Support the operations and programs of specific agencies*

Anita Moeller Endowment Fund for Acre Family Day Care  
Alexander C. Anton and Charles J. Antonopoulos  
Fund for the International Institute of Lowell  
Children's Museum Lowell Endowment Fund  
Community Teamwork, Inc. Endowment Fund  
Goodwill Industries of Merrimack Valley Endowment Fund



Henry D. Thoreau

*The Thoreau Society, which created an endowment fund at the Community Foundation, is the world's oldest and largest organization devoted to an American author. The overarching goal of the Thoreau Society is to encourage the study of Thoreau's writings within the context of his world, and to challenge people in our world to examine how to live responsibly and ethically as part of both social and natural communities.*

Greater Lowell Community Foundation

- Peter S. Stamas Fund
- Mary E. Harrington Fund

LifeLinks Endowment Fund

Lowell Historical Society Centennial Fund

Massachusetts Alliance of Portuguese Speakers (MAPS)

Endowment Funds

- The Manuel N. Coutinho Citizenship Fund
- MAPS Board of Directors Fund
- Dr. Arnold Legal Advocacy and Empowerment Fund\*
- Mary and Humberto Martins Senior Center Fund\*
- Robert and Joanne Perry Family Endowment Fund
- Raul and Marie Pinto Family Fund
- Josefina Brandao Silva Family Fund

Merrimack Repertory Theatre Endowment Fund

Merrimack Valley Housing Partnership Endowment Fund

Nashua River Watershed Association Endowment Fund

New England Quilt Museum Endowment Funds

- 100th Town Quilters Fund
- Carol W. Baird Fund
- Concord Piecemakers Guild Fund
- Greater Hartford Quilt Guild Fund
- Huntington Quilters Fund
- Mothers Day 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

Revolving Museum Endowment Fund

Thoreau Farm Trust Endowment Fund\*

The Thoreau Society\*

United Way of Merrimack Valley Endowment Fund

Whistler House Museum Endowment Fund

\* denotes new fund

## Designated and Multipurpose Funds

*Support specified agencies and programs as well as additional charitable bequests of the donors*

Anonymous Designated Fund  
 Alfred H. and Kathryn E. Coburn Park Fund\*  
 Marguerite H. Colgate Memorial Library Fund  
 Nancy L. Donahue Fund  
 Richard K. Donahue Sr. Park Maintenance Fund\*  
 Jollene Dubner Park Maintenance Fund  
 Erna Fayat Fund  
 James Herscot Lacrosse Fund  
 Kittredge Park Fund  
 Harold J. and Mildred Leclair Fund  
 Ruth C. and John E. Leggat Fund  
 Susan E. Leggat Lowell Festival Fund  
 Lowell Banjo and Fiddler Contest  
 Endowment Fund  
 Lowell Canalways and River Walkways  
 Maintenance Fund  
 Lowell Summer Music Series  
 Endowment Fund  
 Lowell 200th Anniversary Fund  
 Ogonowski New Farm Families Project  
 Father Thomas J. Reddy Oblate Mission  
 Guild Fund  
 Kathryn Stoklosa Knowledge Bowl Fund  
 Whistler House Museum Arts Fund  
 Zaher-Lacouture-Galotta Family Fund

## Donor-Advised Funds

*Provide grants based on regular advice by the donors*

The Avid Fund  
 Mary J. Bacigalupo Community Fund  
 David Bernard Memorial Fund  
 Boisvert Fund  
 David W. and Jean C. Donahue Charitable  
 Fund  
 Enterprise Bank Community Gifts Fund  
 Andrew Curry Green Memorial Fund  
 James Edward Hayden Memorial Fund  
 Human Services Corporation Endowment Fund  
 Kronberg Family Fund  
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Lowell Sun

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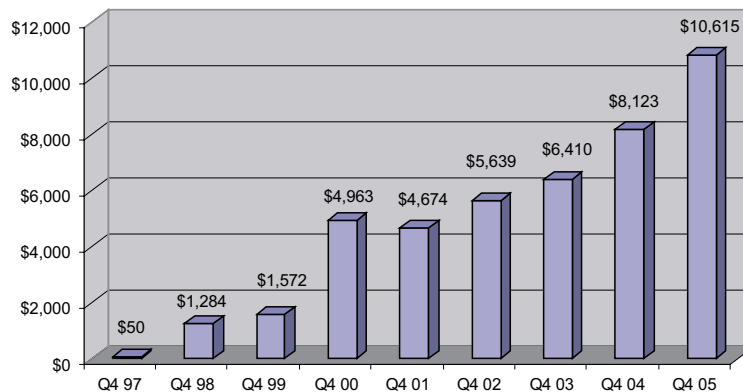
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	31-Mar-01	31-Mar-02	31-Mar-03	31-Mar-04	31-Mar-05
<b>Assets:</b>					
Cash and Investments	4,573,010	5,553,863	5,355,092	7,725,835	9,782,591
Unconditional Promises to Give	62,064	56,229	1,039,927	384,627	823,526
Property, Equipment and Other Assets - Net	39,304	28,520	15,345	12,783	8,823
<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>10,614,940</b>
<b>Liabilities</b>					
Accounts Payable/Accrued Expenses	11,596	9,495	27,817	26,275	20,296
Charitable Gift Annuities	10,645	14,638	12,308	9,978	7,648
Fiscal Agent & Agency Endowment Funds	235,258	395,257	440,354	665,269	811,110
<b>Total Liabilities</b>	<b>257,499</b>	<b>419,390</b>	<b>480,479</b>	<b>701,522</b>	<b>839,054</b>
<b>Net Assets</b>					
Total Net Assets	4,416,879	5,219,222	5,929,885	7,421,723	9,775,886
<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>10,614,940</b>
<b>Support and Revenue</b>					
Total Support and Revenue	186,576	1,458,578	1,329,918	2,048,173	3,060,455
<b>Expenses</b>					
Grants and Scholarships	319,230	375,868	389,685	332,310	370,820
Other Programs	245,715	241,416	140,677	144,920	245,175
General Expenses	34,563	38,951	88,893	79,105	90,297
<b>Total Expenses</b>	<b>599,508</b>	<b>656,235</b>	<b>619,255</b>	<b>556,335</b>	<b>706,292</b>

**Growth of Assets**



Please contact David Kronberg at 978-970-1600 if you would like to request an appointment to view the Community Foundation's most recent audited financial statements and IRS 990 Filings.

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Lowell High School  
Campaign for  
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Abuse Diversion Initiative  
 Peter MacNeill, Program Manager,  
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## **Special Thanks**

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169 Merrimack Street, 5th Floor  
Lowell, Massachusetts 01852-1723

Ph: 978.970.1600

Fax: 978.970.2444

E-mail: [dave.glcfc@verizon.net](mailto:dave.glcfc@verizon.net)

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