

GREATER LOWELL COMMUNITY FOUNDATION

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



2017 Annual Report



A MESSAGE FROM JAY LINNEHAN, PRESIDENT AND CEO



For more than 20 years, the Greater Lowell Community Foundation has partnered with thoughtful individuals, foundations, businesses, and effective area nonprofit agencies, to tackle critical and important issues in our community. Our work is assisting these caring and generous people, companies, and organizations to achieve their goals through strategic, directed philanthropy that is informed by the Foundation's expert staff and their in-depth understanding of local needs and resources.

Together, we are making a difference. Recognizing education as a pathway to success, I am proud to tell you that in 2017 the Foundation awarded more than 250 scholarships, in total about \$436,000 to help college-bound students achieve their goals and dreams. In addition, we awarded a total of \$1.68 million in grants to area organizations. These included \$75,000 in direct grants to battle the opiate addiction crisis, \$15,000 to help protect our waterways, and \$45,000 to organizations who serve children and the elderly.

These grants and scholarships are made possible by the generosity of individuals and organizations who understand the importance, satisfaction, and benefits of investing in their community. Through them, and with the help of skilled investors, the Foundation now has more than \$38 million in assets, and is growing each year. These are funds we employ in partnership with our donors, civic leaders, and other experts, to improve life and build the future in Greater Lowell.

We want to do more - and ask for your partnership. As a donor you will enjoy personalized attention from our professional staff that will make fulfilling your philanthropic intent a pleasure to achieve. We offer many opportunities and options that will help you to enjoy the good feeling that comes from helping others, and may also offer significant tax benefits. We hope you'll join us.

Jay Linnehan
President and CEO

We Succeed, and Our Community Benefits, Because of You.

Your generosity creates meaningful impact. It's our pleasure to steward and grow your charitable gifts, and to employ them to increase support to effective nonprofit organizations who serve our community.

2017 Was a Big Year

- **\$2,353,789 gifts received**
- **301 new donors**
- **\$1,683,044 distributed to 218 nonprofits**
- **\$436,015 awarded to 250 students**
- **364 endowed funds & \$37.7 million total assets**

New Funds Added

- **Hydro Gateway Project**
- **New England Strength & Performance Scholarship Fund**
- **Wyman Trull Bowdoin Scholarship Fund**
- **John H. Costello Book Award for Music Scholarship Fund**
- **Therese Farrell Scholarship Fund**
- **Lowell General Hospital School of Nursing Alumnae Scholarship Fund**
- **Rodger F. Martin Jr. Scholarship Fund**
- **Votze Butler Stone Memorial Scholarship Fund**

\$13.1 million
in grants given since 1997



For a complete list of 2017 grants to nonprofits please visit
www.glcfoundation.org/2017.

We are here to help you meet your philanthropic goals.

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

Opportunities include:

- **Donor Advised Fund**
donors recommend specific charities and causes they want to support
- **Designated or Field of Interest Funds**
donors recommend areas they want to support
- **Scholarship Fund**
awards funds to help aspiring students pursue their education
- **Community Fund**
created with funds raised by a community to benefit that community
- **Discretionary Fund**
gives the expert staff latitude to impact important community needs
- **Annual Fund**
enables the Foundation's broader work as a resource and a convener

The Benefits.

Doing good feels good. While there are certainly tax benefits, the vast majority of people who are philanthropic - whether through gifts of \$100 or \$100,000 - do so because they care. That said, under the new tax laws there are also ways to support your giving very advantageously.

We will help you make the most out of your philanthropy. To learn more about options, or your current fund, please call us at (978) 970-1600.

Custom MMIC's *Women in Engineering* Scholarship

Custom MMIC, a leading Chelmsford-based microwave engineering firm, in partnership with the Greater Lowell Community Foundation, has launched a new "*Women In Engineering*" scholarship. This very generous award has the goal of providing significant 4-year tuition and fees funding for young women pursuing undergraduate degrees in engineering.

"We are very pleased to launch our scholarship program this spring," said Paul Blount, President and CEO of Custom MMIC. "This has been a dream of mine for a few years now, so it is exciting to see it come to fruition. The three women chosen were impressive in their past accomplishments and future goals, and we are proud to play a part in their engineering education. We are also fortunate to have the Greater Lowell Community Foundation as our partner, for the logistical support they provide is a major reason we can offer these scholarships. We look forward to working with them for many years to come."



Paul and Katy Blount with recipients Sarah McKinley, Emma Fournier, and Grace Remillard



AN IMPORTANT PARTNER

Hidden Battles

The mission of Hidden Battles is to defend our defenders. They strive to help preserve the healthy minds of veterans, fire fighters, police officers and first responders through treatment and counseling for depression, suicidal tendencies, and PTSD.

"Our defenders are absorbing the horrors of their occupations. They struggle with the hidden battles fought in their minds on a daily basis. Whether it is the horrors of war, personal injury or a fatal car crash, the effects are everlasting. Over the course of their careers, the stress piles up to sometimes a fatal level.

Our returning soldiers, fire fighters, police officers and other first responders need an outlet.

Whether it is a peer group, a service dog or team building therapy we need to provide them with the programs and services to protect them from internal harm."

<https://hiddenbattlesfoundation.org>

In partnership with the Greater Lowell Community Foundation, Hidden Battles raises funds to support their work, and this fall will begin an endowed Field of Interest fund with the Foundation.

To help support the work of Hidden Battles, please contact the Greater Lowell Community Foundation at (978) 970-1600.

Planned Gifts Secure Your Legacy, Benefit Our Community

Join the Foundation's Legacy Society by establish an enduring philanthropic legacy through charitable gift planning with the Greater Lowell Community Foundation. You'll not only be supporting the issues and causes you care about long into the future, you'll also realize financial, tax and estate planning benefits.

The Foundation accepts a variety of planned gifts from generous individuals who are dedicated to ensuring a positive future for our community. To learn more about our diverse options, for more information or to discuss planned gift opportunities, please contact us directly at (978) 970-1600.

"Growing up in Lowell I learned early on the value of giving back to the community from my family. I plan to continue that tradition long after I'm gone through my legacy plan and the resources provided by the GLCF."

— Glenn Mello



Glenn Mello, a resident of Dracut, is a financial services professional with New York Life. He's been a supporter of the Greater Lowell Community Foundation since 2005 and now serves on the Board of Directors.

LIGHTING THE COX BRIDGE

On Saturday, May 5, 2018, the switch was thrown to brightly light the John E. Cox Memorial Bridge. With more than 220 installed LED lights, capable of producing any color, the bridge has become the newest visual icon for the City of Lowell. Part of the larger *Lowell Waterways Vitality Initiative*, the lighting was produced through a collaboration between the Greater Lowell Community Foundation, Lowell Heritage Partnership, and the City of Lowell. No public money was spent as an anonymous donor fully-funded this project in order to help reinforce the connections within the city between neighborhoods, the downtown, and to recognize the value of everyone working together.

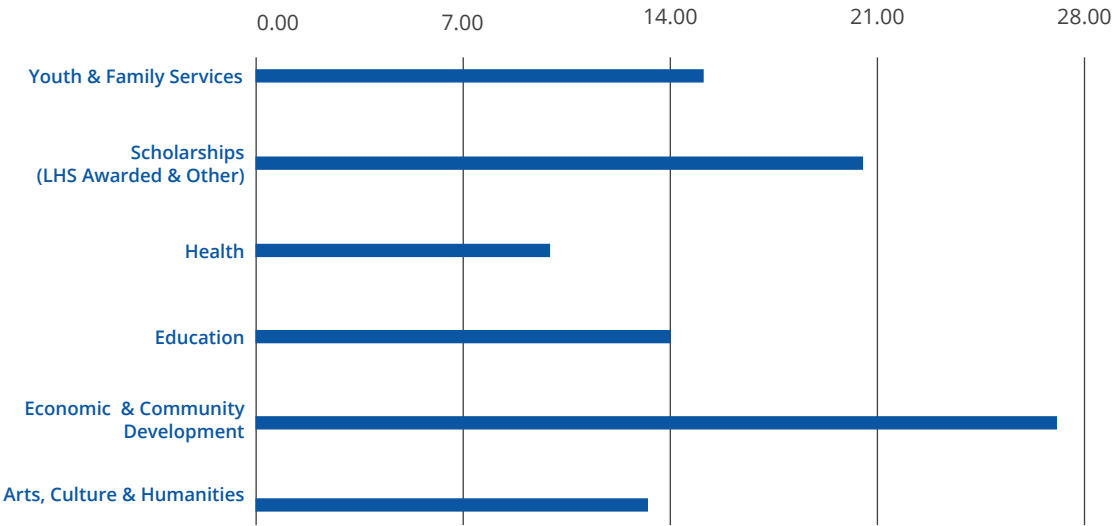


“This project will add to the vibrancy of the city, enhance the connections between neighborhoods and people, and advance the cultural appeal of the region,” said Greater Lowell Community Foundation President and CEO Jay Linnehan.

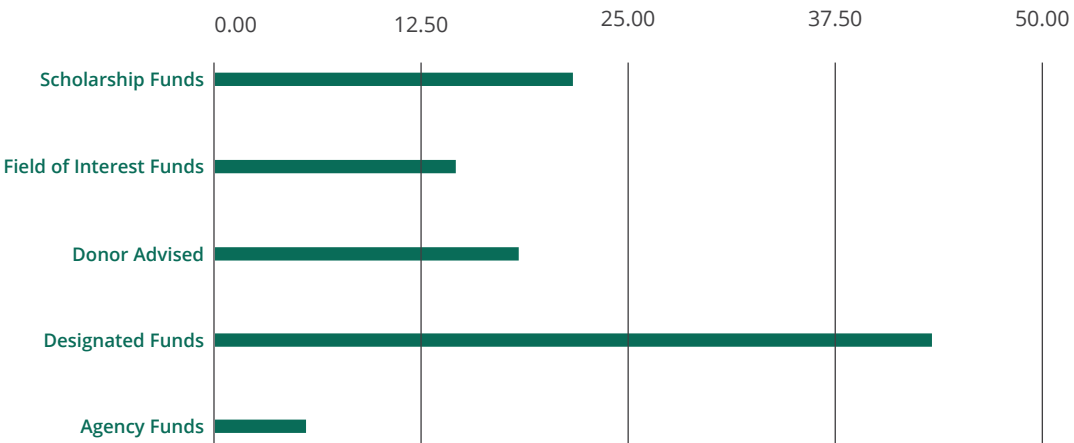
Investing in Solutions

The Greater Lowell Community Foundation focuses impactful, strategic granting by having an in depth working knowledge of the community, collaborating with organizations who serve it, and the priorities of the Foundation’s fund holders and donors. By percentage, the Foundation’s total of \$2.12 million in grants and scholarships were awarded as follows:

2017 GRANT DISTRIBUTIONS BY FOCUS BY PERCENTAGE



2017 GRANT DISTRIBUTIONS BY FUND TYPE BY PERCENTAGE



Lifesaving LUKAS Machines Grant

The Greater Lowell Community Foundation and the Community Foundation of North Central Massachusetts awarded grants to five local towns through the Nashoba Valley Healthcare Fund to help improve the health of residents. The towns of Ashby, Devens, Dunstable, Lancaster, and Shirley each received a grant totaling \$15,593 to purchase a Lucas Chest Compression System. This innovative device, which replaces manual CPR, improves the quality of chest compressions as well as being able to sustain life-saving circulation during prolonged resuscitation attempts.

LUKAS has been studied extensively, shown to be safe and effective and to save patients that would otherwise have been considered futile. With the awarding of these grants, most every community in the Nashoba Valley Healthcare Fund’s service area will now have these state-of-the-art medical devices.



2017 Statement of Financial Position

ASSETS

Cash and investments	36,873,016
Property, equipment - net	5,401
Other assets - net	<u>38,846</u>
Total assets	<u>\$36,917,263</u>

LIABILITIES

Accounts payable / accrued expenses	42,529
Grants payable	11,075
Charitable gift annuities	1,640
Fiscal agency funds	43,522
Agency endowment funds	<u>3,684,516</u>
Total liabilities	<u>\$3,783,282</u>

NET ASSETS

Total net assets	\$33,133,981
Total liabilities and net assets	<u>\$36,917,263</u>

2017 Statement of Activities

SUPPORT AND REVENUE

Contributions, grants and gifts	1,849,239
Investment income	<u>5,428,263</u>
Total support and revenue	<u>\$7,277,502</u>

EXPENSES

Program services	2,242,549
Fundraising and development	189,492
General and management	<u>118,774</u>
Total expenses	<u>\$2,550,815</u>

CHANGE IN NET ASSETS	4,726,687
NET ASSETS AT BEGINNING OF YEAR	\$28,407,294
NET ASSETS AT END OF YEAR	\$33,133,981

In 2017, the return on the Greater Lowell Community Foundation's investments was 19%.

The national average return for all community and private foundations was 14.5%.

Investment Management: The Foundation's assets are managed by a diverse group of experienced investment managers. Their progress and results are monitored by a committee of financial professionals.

WOMEN WORKING WONDERS FUND

Bringing Women Together to Shape the Future

Founded and funded by women, the Women Working Wonders Fund, a component of the Greater Lowell Community Foundation, allows women to take advantage of their unique motivation to impact their community. Through efforts of their dynamic membership and spectacular events like their annual Power of the Purse evening they raise significant funds to support causes that impact the lives of area women and girls.

In 2017 they distributed grants totaling \$20,000 to four area organizations to support their programs: The Center for Hope and Healing, Girls Empowerment Group; Mitsy Kits, Inc., Workshop Facilities Expansion; Strongwater Farm Therapeutic Equestrian Center, Change of Lead Program; and the YWCA of Greater Lowell, Girls Going Green.

To learn more, or to join us, please contact Ms. Carrie Meikle at csmeikle@hotmail.com.



The 2017 Power of the Purse event raised more than \$75,000 to support their philanthropic grants.

New Drug Court Transportation Program

Building on a relationship begun in 2016, the Greater Lowell Community Foundation is proud to be partnering with the office of District Attorney Marian T. Ryan, and Community Teamwork Inc., on a new program that provide services for individuals who attend weekly Drug Court sessions in Lowell.

An extension of the Foundation's multi-year focus on alleviating the opioid epidemic, a \$10,000 grant funds costs of weekly van service. Drug Court participants will be picked up at the front door of their treatment placement, brought directly to the court house and will be driven home at the conclusion of the session. While at the sessions, participants will have access to Community Teamwork staff who can help identify additional needs and connect individuals to available resources throughout the community. The court is a critical component of each participant's treatment plan and success. The services being offered by Community Teamwork will enable individuals to access the court with as little stress possible and will remove some of the barriers they may face on their road to recovery.



Middlesex District Attorney | **Marian T. Ryan**

(0601518-265)

COMMUNITY INVESTMENT

Individual Donors

Platinum

Mr. and Mrs. Gilbert G. Campbell
Mr. and Mrs. Alexander M. Chanler
Mr. and Mrs. David W. Donahue
Mrs. Nancy L. Donahue
Mr. and Mrs. George L. Duncan
Mark and Elisia Saab Family Fund
Nancy L. Donahue Fund
Nancy L. Donahue Fund in Memory
of Richard K. Donahue Sr.
Dr. Titus Plomaritis Sr.
Mr. and Mrs. Donald Progen
Ms. Nancy Selvage
Ms. Marilyn S. Swartz-Lloyd
Votze Butler Charitable Fund
Mr. Drew Weber
Women Working Wonders
Anonymous

Gold

Donahue Family Fund
Mr. and Mrs. James F. Linnehan Jr.
Lowell Waterways Lighting Initiative
Mr. Paul F. Marion
Mr. Joseph R. Martin
Mary E. Harrington Fund
Ms. Martha Mayo

Silver

Mr. John L. Barkley
Mr. and Mrs. William A. Barnstead Jr.
Mr. and Mrs. Joseph J. Bartolotta
Ms. Yun-Ju Choi
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Mrs. Carol S. Duncan
Mr. and Mrs. Robert P. Gregoire
Ms. Janet Hartford
John C. Kent Jr. Relay Race Fiscal
Sponsorship
Ms. Kristen Lynch-Cerullo

Mr. and Mrs. Jack D. O'Connor
Ogonowski New Farm Families
Endowment Fund
Anonymous

Bronze

Mr. Oliver Ames
Mr. and Mrs. Arthur C. Anton Sr.
Mrs. Nancy M. Bernard
Mrs. Grace R. Conway
David W. and Jean D. Donahue
Charitable Fund
Drew Weber Charitable Fund
Mr. Joseph P. Fallon
Mr. and Mrs. P. Scott Flagg
Mr. and Mrs. Eric W. Hanson
Hidden Battles Fund
Joann Weber Charitable Fund
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Mr. and Mrs. Michael Rider
Mr. and Mrs. Akhilesh Sastry
Mr. and Mrs. Harry L. Spatz
Mr. and Mrs. Chester J. Szablak Jr.
Top of the Hill Fund
Mr. George N. Tsapatsaris
Mr. and Mrs. John J. Winn
Anonymous

Copper

Andrew Curry Green Memorial Fund
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Mr. Dylan Ashworth
Col. (ret) and Mrs. Alan E. Babigan D.D.S
Mr. and Mrs. Todd M. Bazemore
Mrs. Mary Burwood
Mr. and Mrs. Patrick Chen-Courtin
Mr. and Mrs. John P. Clancy
Community Impact Fund - Social
Services in Lowell
Community Pay It Forward Fund
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Ms. Brenda J. Costello
Mr. Mark D. Cote
Mr. and Mrs. Thomas J. Cullen
Mr. and Mrs. Philip T. Dancause
Ms. Maureen F. DiPalma
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Mr. Robert H. Eremain
Mr. Peter C. Flomp
Ms. Karen N. Frederick
Ms. Barbara A. Green
Mr. and Mrs. Adam J. Hatch
Mr. Mike Healy
Mrs. Paula C. Kent
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Lowell Women's Week
Mary F. Hogan Fund for GLCF
Mr. John H. Moynihan
Mr. and Mrs. James D. Nolan
Mr. Thomas M. Reichheld
Mr. Peter W. Reilly
Mr. and Mrs. Bernard H. Rosman
Mr. and Mrs. Alan M. Sayer
Mr. and Mrs. Brian J. Stafford
Mr. and Mrs. John L. Sullivan
Congresswoman Nicola S. Tsongas
Mrs. Emily V. Wade
Mr. and Mrs. Michael R. Woodlock

Foundation Donors

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

We appreciatively acknowledge our founding Foundations:

The Theodore Edson Parker Foundation (Moses Greeley
Parker Foundation and Mary Greeley Parker Morrison
Foundation) for their initial and continued support.

Jessie B. Cox Charitable Trust Fund
Massachusetts Environmental Trust

Platinum

Eastern Bank Charitable
Foundation
Henry C. & Audrienne Murray
Foundation
Juniper Networks Foundation Fund
Limo Almi Foundation
Netscout Systems Inc, Charitable
Giving Program
Richard K. and Nancy L. Donahue
Charitable Foundation Trust
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Theodore Edson Parker
Foundation

Copper

American Foundation for Suicide
Prevention
David Bohnett Foundation
Essex County Community
Foundation
GE Foundation
Home Health Foundation, Inc.
Joseph P. Donahue Charitable
Foundation Trust
Live For Liv Foundation
New England PBA, Inc. Charitable
Foundation
Saab Family Foundation

Gold

Aubert J. Fay Charitable Fund
Foundation M
Spartanburg County Foundation
Thibault Foundation

Silver

Battles Foundation, Inc.
Lowell Festival Foundation

Bronze

Careful Drivers Foundation
Demoulas Foundation
Henry and Winifred Lyons Foundation

COMMUNITY INVESTMENT

In 2017, Netscout Systems awarded its third Heart of Giving grant through the Greater Lowell Community Foundation to Catie's Closet of Dracut to support their work of providing clothing and toiletries to children in 37 schools throughout Massachusetts and New Hampshire.



Business & Organization Donors

Premier

Enterprise Bank

Platinum

Eastern Salt Company, Inc.
Lowell Heritage Partnership, Inc.
Lowell Sun Charities, Inc.
Massachusetts Alliance of Portuguese Speakers
Media One
Miriam Shaw Fund UW
Non-Profit Alliance of Greater Lowell
Votze, Butler & Associates, Inc.

Gold

Circle Health
DCU - Digital Federal Credit Union
Edge Group, Inc.
Jeanne D'Arc Credit Union
Lowell Five Cent Savings Bank
Lowell General Hospital Nurses Alumnae
Mahoney Oil Company Co., Inc.
Merrimack Valley Housing Partnership, Inc.
Morpho Detection, Inc. Safran Group
New England Quilt Museum
Trinity E.M.S., Inc.
U.S. Trust, Bank of America Private Wealth Management

Silver

Airbus Group, Inc.
Chelmsford Business Association, Inc.
Element Care
Emerson Hospital
Enterprise Bank Community Gifts Fund
Hydro Gateway Project
Watermark

Bronze

Align Credit Union
Anton's Cleaners, Inc.
Cambodian American Scholarship
Central Plaza Realty, LLC
Community Teamwork, Inc.
Desjardins, LLC
EagleClaw Capital Management, LLC
Jericho Road Project, Inc.
Joncas Associates
Lahey Hospital & Medical Center
LMP-Lowell Realty, LLC
Lowell Community Health Center
Lowell Restoration, Inc.
Madison Security Group, Inc.
MEC Electrical Contractors, Inc.
MEC Technologies, Inc.
Merrimack Valley Food Bank, Inc.
Michael G. Conway Insurance Agency, Inc.
Middlesex Community College
Mill City Environmental Corporation
Mill City Medical Group LTD
O'Connor School Portraits & Assoc., Inc.
PrideSTAR EMS, Inc.
Rogers Hall Corporation
Soucy Industries, Inc.
University of Massachusetts Lowell
Veterans Assisting Veterans, Inc.
Whole Foods Market Westford

Copper

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Athenian Corner Restaurant & Lounge, Inc.
Bon Marche Trust

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City of Lowell Women's Golf Tournament, Inc.
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Princeton Properties Management, Inc.
RBC Wealth Management
Redfin
Roark Law Office, P.C.
RoCo Tech Services, LLC
Top Line Granite Design, Inc.
Washington Savings Bank
Westford Police Association

2017 CELEBRATE GIVING

Jim Peyser, Massachusetts Secretary of Education

On October 4, 2017, the Foundation hosted a very special Celebrate Giving event at the UMass Inn and Conference Center in Lowell. The theme of the evening was education with Keynote Speaker Jim Peyser, Massachusetts Secretary of Education.



The evening highlighted the work of the Foundation supporting education in Greater Lowell. Nearly half (47%) of all distributions from the Community Foundation support education, whether through scholarships to students or education and training programs.



2018 ANNUAL MEETING

On June 5th, nearly 150 business leaders, nonprofit professionals, and community members gathered at the Radisson in Chelmsford for the Greater Lowell Community Foundation's Annual Meeting, "Road to Recovery." The evening's keynote speaker was Middlesex District Attorney Marian T. Ryan. Ryan is recognized for her leadership on the opioid crisis and her innovative programs that address all aspects of abuse and addiction—prosecution, prevention, and treatment. She spoke about local efforts including her work to establish a drug court program in Lowell to assist people in recovery.

Jay Linnehan spoke about the impact of charitable giving in the Greater Lowell Community, citing the \$2.1 million in grants awarded by the Foundation to students and nonprofits in the last year. Linnehan talked about a commitment to strategic growth in Greater Lowell communities that would build the endowment and allow for increased support of community needs including education and civic engagement.



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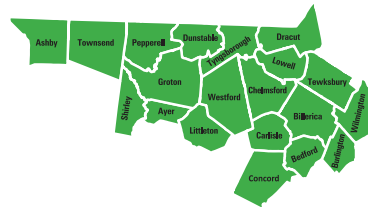
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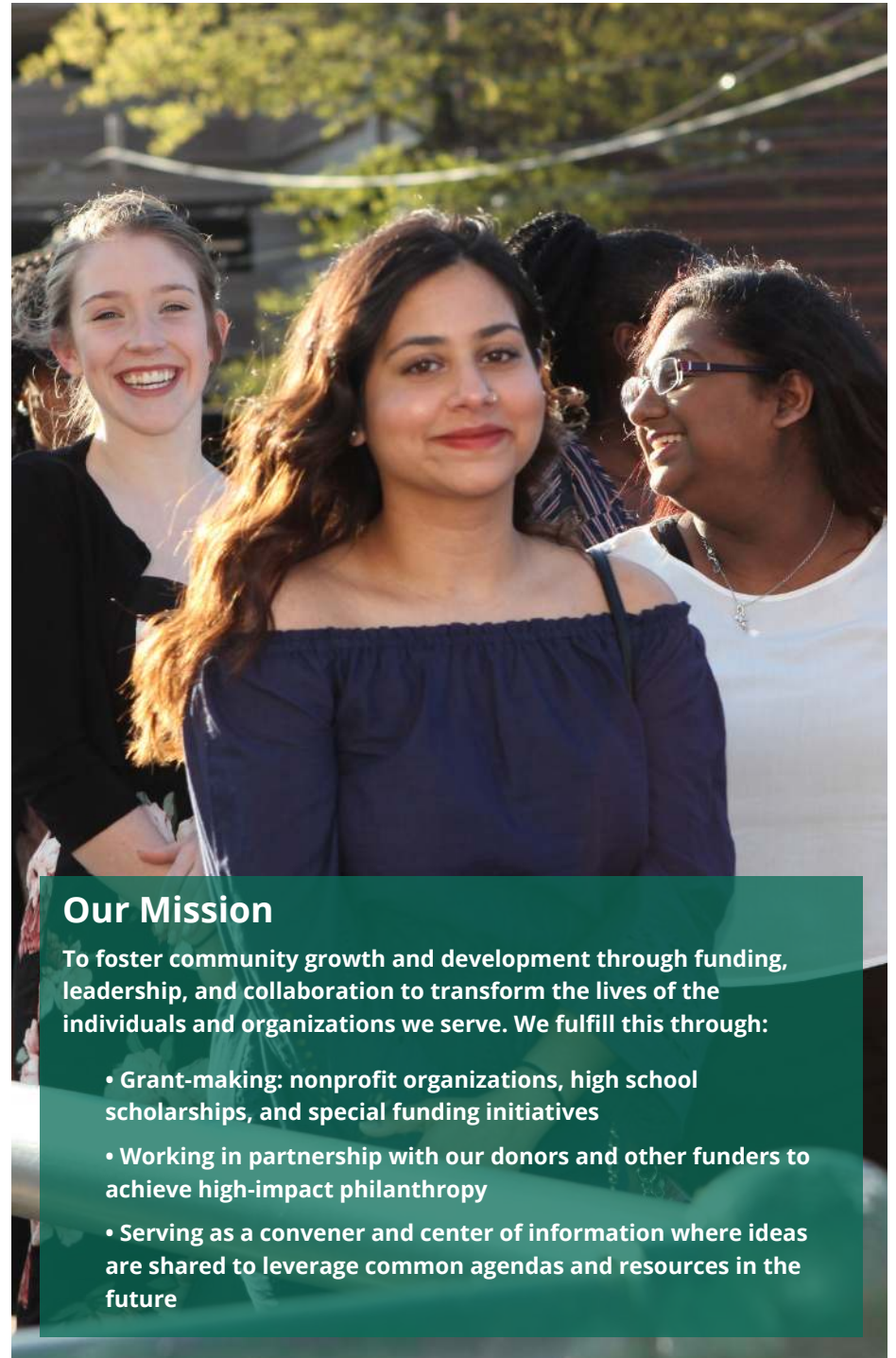
COMMUNITIES SERVED

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



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

Designed by Nicole Schradieck
nicoleschradieck.myportfolio.com



Our Mission

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

- Grant-making: nonprofit organizations, high school scholarships, and special funding initiatives
- Working in partnership with our donors and other funders to achieve high-impact philanthropy
- Serving as a convener and center of information where ideas are shared to leverage common agendas and resources in the future