

# PEOPLE PARTNERING FOR PROGRESS



REPORT TO THE COMMUNITY MARCH 2003





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*Cover: City of Lowell*

*(Photo courtesy of Division of Planning and Development, City of Lowell)*

*"People Partnering for Progress" designed by Quintessential Design and printed by  
Sullivan Brothers Printers.*

*We dedicate* this Report to the Community to Peter S. Stamas (1930-2002), the first treasurer of the Greater Lowell Community Foundation.

As a longtime booster of Greater Lowell, Peter added immeasurable life, laughter, and wisdom to building the community through civic action. As a friend, mentor, educator, and colleague, he personally touched the lives of thousands.

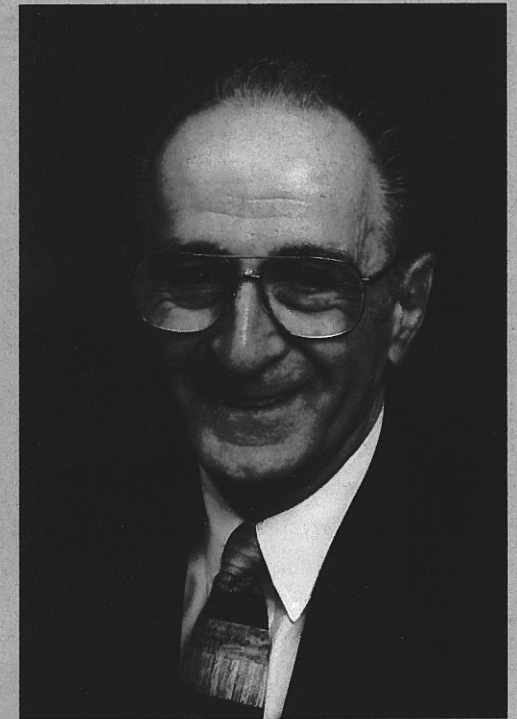
Peter served as headmaster of Lowell High School for 17 years. In addition to shaping the minds of Lowell's future leaders through his commitment to their education, Peter led by example. He was one of Lowell's most exemplary community activists, co-founding the Greater Lowell Community Foundation and presiding over the Human Services Corporation throughout much of its 31-year history.

At the Community Foundation, Peter promoted community service as a means to better the region's quality of life and to become a powerful and sustainable force through the creation of permanent endowments that continually fund life-enriching programs.

With his first act as treasurer, Peter combined his devotion to education with his civic dedication by encouraging the transfer of Lowell High School's 39 temporary scholarships, worth approximately \$500,000, to the Community Foundation. Five years later, there are 64 permanent scholarships valued at approximately \$1,000,000. Hundreds contributed to the Peter S. Stamas Scholarship Fund when he died in October 2002.

Under Peter's leadership, the Human Services Corporation supported programs designed to help Lowell socially, culturally, and economically and was instrumental in the creation of the Lowell National Historical Park and the Lowell Flowering City initiative. In his last civic act, he oversaw the transfer of \$100,000 from the Human Services Corporation to create an endowment fund that will perpetuate the Corporation's ideals and activities.

In memory of his outstanding life of service to education, community and human services, philanthropy, his church, and the many other charitable organizations to which he added so much vitality and inspiration, we honor Peter with this report.



**Peter S. Stamas**

# welcome message from the president and executive director

This "People Partnering for Progress" report chronicles the Greater Lowell Community Foundation's work to improve the quality of life in the municipalities of our service area during our fifth full year as the "community's foundation."

In spite of the economic downturn, 2002 was a growth year for the Community Foundation. Generous community residents and businesses created 17 new endowment funds, bringing the number of separately named permanent endowments to 131. Moreover, the Community Foundation's special programs received new and renewed grants and contributions from private foundations, corporations, and individuals. Thanks to prudent investment strategies the Foundation's philanthropic capital declined only

modestly, thereby preserving scholarship awards, program funding, and the organizational support on which so many nonprofits have come to rely.

In addition to increasing the number of permanent charitable legacies, the Foundation's staff continued to create and sustain innovative programs benefiting our region. Among them are initiatives that reduce crime and drug use by the region's youth, strengthen civic participation of immigrants and refugees, and build scholarship monies for Lowell High School's graduates. For the sixth time, our annual Philanthropy Day conference brought volunteers and community leaders together to explore ways to provide local residents with skills, knowledge, and networks to advance their commitment to our communities.

As you review the philanthropic accomplishments of your friends and neighbors, we are sure you will be inspired by the diverse ways each one of us can make a difference that lasts. When we add our marks to the community through charitable vision and resource contribution, extraordinary things happen. We join with others in a powerful, constant process of envisioning, building, and permanently enriching our community. There is great and honorable purpose in this collaborative work.

Welcome to the Community Foundation. We look forward to working with you to realize your own commitment to community.

Luis Pedrosa



Chanrithy R. Uong



Chester Atkins



*Board of Directors of the Greater Lowell Community Foundation*

*Standing L to R: David Kronberg, Executive Director; Richard K. Donahue, Sr., President; Brian J. Stafford, Assistant Treasurer; James C. Shannon III, Treasurer; Kay Doyle; George L. Duncan; Winslow H. Duke; Sitting L to R: John E. Leggat, Vice President; Mary Jo Leahey; Lura Smith; Carol Amick.*

Richard K. Donahue, Sr.  
President

David Kronberg  
Executive Director



# what is the greater lowell community foundation

Start w/ 1 pg. Fact Sheet

Somebody's got foundation  
"At a Glance"  
Here's what we are

Founded 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.



Representatives of 41 nonprofit and environmental organizations assembled at the 6th annual Philanthropy day to receive over \$106,000 in grants. The grants were awarded for projects to strengthen organizational capacity, and the first grants awarded under the new Water Resources Grant Program.

## 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.

# a catalyst for change, community service, environmental leadership, and civic engagement

In addition to serving the charitable priorities of its donors, the Greater Lowell Community Foundation champions innovative social change through the special initiatives and grant-making programs we sponsor. In 2002, we convened diverse voices to address local issues and opportunities for the betterment of our residents and region. Specifically, we worked with nonprofit organizations and committed individuals to create new programs and accelerate the momentum of projects established in previous years.

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

Lowell High School (LHS) is the oldest public coeducational high school in America, and it is the second largest public high school in the Commonwealth of Massachusetts. The tradition this high school holds is eclipsed only by the challenge it faces in meeting the needs of an extraordinarily diverse student body. For example, many of the students do not have the resources to pursue a college education and fulfill their educational dreams. Compounding reductions in public financing for local education, public high schools like Lowell High have traditionally lacked the development infrastructure to create permanent scholarships for college-bound students, but in 2002, LHS and the Greater Lowell Community Foundation joined forces to directly address this ever-growing need.

By reaching out to one of the school's most valuable assets, its alumni, the \$5,000,000 Lowell High School *Campaign for Educational Excellence* will secure permanent scholarships and create other endowed funds for educational enrichment programs. Through this adaptation of the successful private school model, the Community Foundation will serve as steward of the *Campaign*, which is led by a steering committee of prominent local leaders and alumni. The Foundation also manages more than 60 permanent scholarship funds on behalf of the school.



Since April 2002, the *Campaign* raised more than \$200,000 and created 10 new endowed scholarship funds, including a permanent fund to ensure annual awards for the class valedictorian and salutatorian and scholarships for African-American and Latino students. In 2003, the *Campaign's* steering committee will secure major contributions from a targeted group of the school's most prominent alums. The drive will then contact all Lowell High graduates about contributing to the *Campaign for Educational Excellence*.

As one of the most innovative public secondary education endowment partnerships in the country, the Community Foundation hopes to extend the Lowell High School model to other high schools in the Foundation's service area.

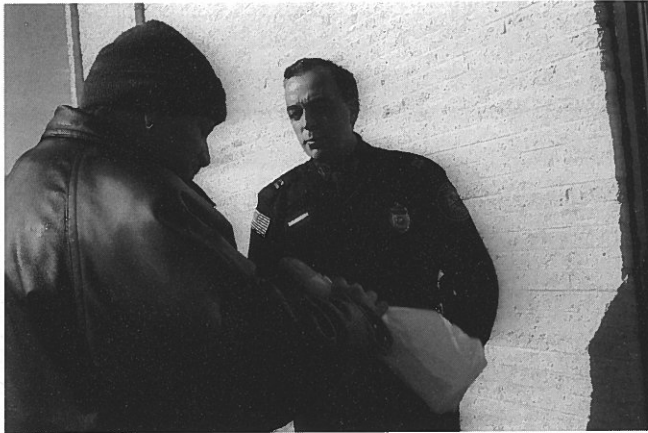
## **Substance Abuse Diversion Initiative of Lowell (SADIL)**

The personal and social devastation caused by substance abuse is one of the greatest threats to all our communities. In fact, fully ninety percent of all robberies and burglaries in our towns are caused by drug abusers desperate to pay for their drugs. It is also well recognized that law enforcement cannot arrest this widening scourge by incarcerating non-violent addicts over and over again. The Substance Abuse Diversion Initiative works on the premise that the most cost effective approach is to reach the most vulnerable youth at the point of arrest by using the implied force of the police. Instead, police officers now offer these kids hope for an escape from drugs and the degradations of the street. What follows is referral to a participating treatment facility and intensive clinical services as an alternative to jail and the precipitous downward spiral to which this path usually leads.

An enlightened police force is at the forefront of this revolutionary new approach. Armed with a simple card that lists the phone number of Lowell House, the city's main treatment facility, and backed up by implicit force and training to communicate and respond to the individual's plight, Lowell's law enforcement is the first point of contact for treatment of youth at risk. When the young person takes the first big step and makes the call and appointment, the rest of the program kicks in. The project combines

*Lowell Police Captain  
Bob DeMoura  
talks to a sometime drug  
user who is trying to get  
clean, outside  
the Lowell House*

*(Photo courtesy of  
The Globe Newspaper  
Company, Inc.)*



structured, strength-based intensive treatment services with community support to help these young people become productive and responsible and help them return to their families and communities. In doing this, the Diversion Initiative enhances public safety in Lowell and serves as a model of innovation to other cities plagued by drug-related crime.

Convened by and funded through the Greater Lowell Community Foundation, this collaboration of Lowell's police department, Lowell House, and other social and community services represents the pilot effort for a cost-effective alternative justice program to address drug abuse among risk youth.

Key to the success of the project is police training. Captain Robert DeMoura, the Lowell Police Department's SADIL liaison, and Lowell House staff instruct all law enforcement officers participating in mandatory training at the Lowell Police Department Training Institute. These weekly sessions reach more than 1,000 police officers from 21 cities and towns in Massachusetts. Each officer receives information about addiction, recognizing the signs and symptoms of substance abuse, and using the SADIL program as a tool for assisting residents and increasing public safety. Sessions also focus on treatment options and available community resources.

In addition, the Diversion Initiative's Project Director provides the Middlesex Sheriff's office group facilitation services for clients between 17 and 25 years of age. In exchange the Diversion Initiative receives free drug screening services for approximately 60 clients using state of the art equipment as an in-kind donation.

The result has been the promotion of a paradigm shift in approach to youth at risk. Plans are now being made to extend this unique program to other cities in Massachusetts.

## **One Lowell: Building a New American Community**

ONE Lowell is a coalition of immigrant/refugee organizations and mainstream institutions that facilitates the integration of Lowell's large newcomer population into the shared public society. ONE Lowell influences the creation of culturally diverse programs in partnership with others, and then empowers its partners to implement and manage the programs. These partnerships enable each group to grow in cultural awareness, respect, and sensitivity. Because integration cannot be achieved through a single type of activity, ONE Lowell engages in activities that cross traditional lines.

Throughout the past year, ONE Lowell's cultural resources and mainstream connections promoted systematic changes that addressed the needs of immigrants and allowed their voices to be heard. For example, ONE Lowell and the Non-Profit Alliance of Greater Lowell ran the Campaign for Voter Vitality to encourage new residents to vote in the 2002 state and local elections. By conducting citywide outreach, the organizations increased voter registration by 29 percent from June 1 through October 28, compared with the same time period in 1998 when the last gubernatorial race was conducted.

ONE Lowell also increased economic opportunities for newcomers in 2002, creating the International Bazaar with the Lowell Small Business Assistance Center, the Downtown Lowell Business Association, and Middlesex Community College. On three occasions during the summer, immigrant and refugee artisans sold their art and handmade crafts at a small park in downtown Lowell. These fairs fostered interaction between the new



*Attendees at a public  
forum sponsored by  
ONE Lowell:  
Building a New  
American Community  
and the Nonprofit  
Alliance*



groups and the established community who frequented the Bazaars, as well as encouraged collaboration across the newcomer communities. Artists from all the major communities participated, and each artist generated a small profit.

To encourage the development of leaders within the immigrant communities, ONE Lowell initiated the Immigrant/Refugee Leadership Development Series. Training seminars included public speaking, community organizing, "Get Out the Vote" activities, grant writing, and fundraising. Each session attracted an average of 30 participants.

In 2002, ONE Lowell co-sponsored "Partnerships in Diversity" with the American Association of University Women at which 125 people discussed access to services, bi-cultural youth, and discrimination in standardized testing for non-English speakers. ONE Lowell also surveyed English as a Second Language (ESL) programs, and hosted two English Language Provider forums that addressed barriers to access to ESL classes. More recently, ONE Lowell completed a four-language brochure providing information on ESL resources in the city.

By mid 2003, the Community Foundation will transfer its fiscal sponsorship of ONE Lowell to Community Teamwork, Inc.

### **John A. Ogonowski New Farm Families Project**

In August 2002, the Greater Lowell Community Foundation officially launched a capital and endowment campaign to fund a living memorial honoring Captain John A. Ogonowski, pilot of American Airlines Flight 11, which crashed into the World Trade Center during the September 11, 2001 terror attacks. The monies raised will be used to acquire land and equipment and build endowment capital to allow the New Entry Sustainable Farming Project (NESFP), in which Mr. Ogonowski participated as a mentor-farmer, to become a long-term, independent program, free from the restraints imposed by its current temporary funding sources. True to Captain Ogonowski's values and inspired by his efforts, the farming project encourages new immigrants to embrace the American dream, just as his family did two generations earlier. The memorial will be permanently endowed when the John A. Ogonowski New Farm Family Project reaches its \$4,000,000 goal.

When not flying, Mr. Ogonowski operated White Gate Farm in Dracut, Massachusetts. In 1998, he began working with the sustainable farming project, contributing 15 acres of land to eight Southeast Asian families and providing them with technical assistance and guidance about farming in New England. The new entry farming project assists recent



*Nearly 300 people attended the Sixth Annual Philanthropy Day, New Traditions in Philanthropy at the DoubleTree RiverFront Hotel*

immigrants with agricultural backgrounds to become successful farmers in Massachusetts. It is fully operational under the auspices of Tufts University and Community Teamwork, Inc. with funding from the U.S. Department of Agriculture, private foundations, and other sources.

The Ogonowski family, Greater Lowell Community Foundation, Dracut Land Trust (which is a local organization founded under Mr. Ogonowski's leadership to preserve land from development), Tufts University, and others are seeking to ensure the future of the project through a permanent endowment and additional capital to:

- Develop a larger and more permanent mentor farm training site with facilities for production, post-harvest handling, and marketing in Dracut or another nearby community;
- Better equip existing mentor sites and expand the project with additional leased farm sites; and,
- Fund a year-round farm site manager to bring the project to scale.

New farmers are urgently needed to sustain Massachusetts' endangered agricultural tradition, enhance the value that active and open spaces bring to the state, and meet



the demand for fresh produce both common to the region and specific to the culture of the growers.

To date, more than \$50,000 has been raised through early contributions to the New Farm Family Project for endowment funds and to cover initial campaign administration and fundraising costs from a number of individuals, the Theodore Edson Parker Foundation, and Dracut Land Trust. The Greater Lowell Community Foundation administers the Ogonowski New Farm Family Fund and operates the campaign through a steering committee that includes members of the Ogonowski family, former Secretary of Agriculture Gus Schumacher, representatives of the Dracut Land Trust and other leading members of the Greater Lowell community. The Macintyre Consulting Group from Worcester, Massachusetts, provided campaign counsel.

### Sixth Annual Philanthropy Day

In May 2002, the Community Foundation's signature event, Philanthropy Day, brought together nearly 300 community leaders, nonprofit executives, volunteers, philanthropists, and foundation representatives to explore forward-looking plans and services that will meet the civic, social, and community needs of the region's residents. The sixth annual conference focused on new traditions in philanthropy through panel discussions, personal stories of giving, the distribution of \$100,000 in nonprofit organizational capacity grants, and a keynote speech by noted leader of and commentator on philanthropy, George McCully.

*George McCully,  
the creator of the  
Catalogue  
for Philanthropy,  
was keynote speaker  
at the Sixth Annual  
Philanthropy Day*



In three panel discussions, three very different civic organizations presented their efforts to reach out to distinct segments of Greater Lowell's population. Specifically, the panelists discussed:

- The Lowell Police Department's new approach to reducing the social and personal devastation caused by substance abuse;
- A Concord church's innovative commitment to connecting its parishioners with opportunities to work on a variety of challenges faced by area nonprofits and the people they serve; and,
- How Lowell's immigrant-serving agencies have banded together to encourage the civic integration of the city's newest residents.

Four personal journeys into philanthropy were described by Peg Ogonowski, Walter Bacigalupo, Brian Reynolds, Jr., and the Zaher sisters, Florence Lacouture and Mary Galotta, all of whom created permanent legacies in memory of cherished loved ones to serve a remarkable variety of community needs.

George McCully, the creator of the *Catalogue for Philanthropy* and the *Generosity Index* spoke about the fundamental changes occurring in philanthropy and personal charitable engagement. Philanthropy Day concluded with roundtable discussions lead by professional fundraising consultants and grant makers.

### Second Annual Volunteer of the Year Awards

At the annual Philanthropy Day conference, the Greater Lowell Community Foundation recognized two individuals, Kathleen Muldoon and M. Elizabeth Anderson, for exemplary volunteerism. Both women accepted \$1,000 awards from the Community Foundation as Volunteers of the Year, which they then conveyed to the charitable groups of their choice.

Ms. Muldoon, a project manager for Lowell's Enterprise Community, led the program's development as a national model for grassroots control of enterprise community grants and oversaw the distribution of start-up money for important community service projects, including Community Schools, Suitability, Inc., the United Teen Equality Center (UTEC), and the Lowell Small Business Assistance Center. Ms. Muldoon is also the co-founder and principle organizer of the Greater Lowell Women's Network, a group that gathers the area's business, educational, civic, and activist women leaders together



*Kathleen Muldoon of Lowell (l.),  
Volunteer of the Year, with  
Nancy Klienewski, Co-Chair of  
the Volunteer Awards Committee*



*M. Elizabeth Anderson of Westford (l.),  
Volunteer of the Year, with Gretchen Vrieze  
of Nashawtuc Charities, Concord*

every month to provide critical networking opportunities and information about community organizations. She has been an active participant in the Downtown Lowell Business Association, the New England Quilt Museum, Suitability, Inc., and the Greater Lowell Interfaith Alliance. Ms. Muldoon gave her award to the Lowell General Hospital Team Walk for Cancer Care.

Ms. Anderson devotes much of her time to volunteer work. She is a year-round volunteer organizer for the FleetBoston Classic, a Senior PGA Tour event that supports the Nashawtuc Charities, and has been active in a number of civic, health care, and children's activities. Specifically, Ms. Anderson has been an election official and a member of the League of Women Voters, Westford's Permanent School Building Committee, and the Westford Garden Club. She served on the Emerson Hospital Auxiliary and currently volunteers at the Westford Nursing Home. She also has worked with the Girl Scouts, the Parent-Teacher Association, Little League, and youth hockey. Ms. Anderson elected to give her award to the Nashawtuc Charities.

### **Lowell Trolley Endowment Study**

In 2002, Lowell remains almost entirely intact as a nineteenth century industrial city. The city's landscape suggests a compelling picture of the past and offers a remarkable opportunity to capitalize on its standing as an urban national park that celebrates the birth of American industrialism. As a means to helping Lowell realize its goal of becoming a destination city, it has been suggested that Lowell implement a trolley system. The system would link the city's neighborhoods with the commuter rail station at the Gallagher Terminal and the cultural, educational, athletic, convention, and business sites downtown. Urban trolley systems have been demonstrated to be an effective magnet for tourism in other cities around the country and represent a powerful opportunity for Lowell's continued economic development.

The Volpe Center of the US Department of Transportation commissioned the Greater Lowell Community Foundation to prepare a report on establishing an endowment to support the proposed trolley/streetcar system in Lowell as part of its overall feasibility study prepared in association with the Lowell National Historical Park. After reviewing the Tampa/Hillsborough County trolley system in Florida, a national model, the Community Foundation recommended a framework for creating an endowment that can reduce the burden of fees and public subsidy.

### **Protecting the Merrimack, Nashua, and Sudbury-Assabet-Concord River Watersheds**

Last year, the Community Foundation established its first permanent environmental endowment to protect water resources in the Greater Lowell region. At Philanthropy Day, the Foundation awarded the first three grants from the fund to leading watershed protection organizations within the watersheds. (Please see the environmental grants section of this report for more information.)



# 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, and has attracted short-term pass-through funds to increase the number and size of capacity grants over the past four years. Since 1998, 135 grants worth more than \$400,000 have been awarded to the region's

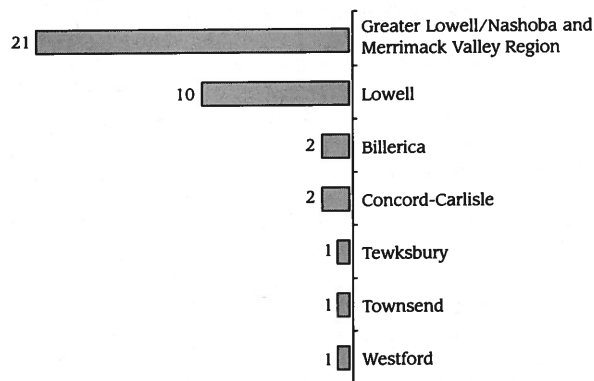
nonprofits helping them better achieve their missions in the cities and towns they serve.

In 2002, the Community Foundation awarded \$100,000 to 38 nonprofit organizations. Funds for these grants came from the Kelly Foundation, the Richard K. and Nancy L. Donahue Charitable Foundations Trust, the Jessie B. Cox Charitable Trust, and the three endowed discretionary funds of the Community Foundation, the Founders Fund, the Moses Greeley Parker and Mary Greeley Parker Morrison Fund for Lowell and the Harold J. and Mildred Leclair Fund.

## Profile of Capacity Building Grants; Number of Applicants, Funds Requested, Range of Awards

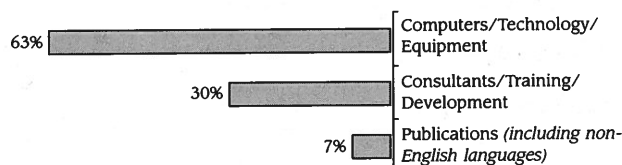
Proposals received:	60
Proposals reviewed:	55 (91% of proposals received)
Proposals funded:	38 (70% of proposals reviewed)
Funds requested:	more than \$158,720
Funds awarded:	\$100,000
Range of awards:	\$1,000 – \$3,000
Coalitions funded:	6 (16%)
New grantees:	13 (34%)
Repeat grantees:	25 (66%)

## Geographic Reach and Focus

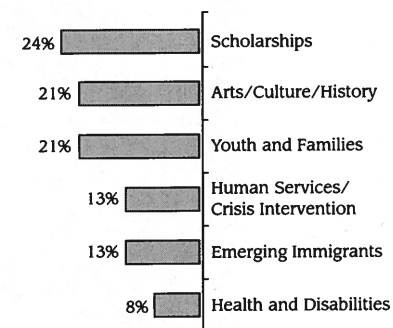


Into Greater Lowell and Merrimack Valley area *directly*: 55%  
 Lowell *directly*: 26%  
 Non-Lowell towns *directly*: 19%

## Types of Capacity Building Requests



## Service Category of All GLCF Grantees



# grants by program area and funding source

## Arts, Culture, and Humanities

### Capacity Grants

#### Angkor Dance Troupe, Lowell, \$3,000

*Funded by the Jessie B. Cox Charitable Lead Trust*

To produce a CD, enhance merchandising operations, and support online sales to create an independent income stream for the Troupe.

#### Billerica Historical Society, Billerica, \$2,200

*Funded by the Jessie B. Cox Charitable Lead Trust*

To provide volunteer training programs.

#### Brush Art Gallery and Studios, Lowell, \$1,000

*From the Moses Greeley Parker Fund*

To purchase a computer, scanner, and network router to upgrade its systems.

#### Lowell Festival Foundation, Lowell, \$2,825

*From the Harold J. and Mildred LeClair Fund*

To create a website called "Lowell Celebrates" in order to generate ticket sales for Lowell events.

#### Lowell Heritage Partnership, Lowell, \$3,000

*Funded by the Jessie B. Cox Charitable Lead Trust*

To produce a map and guide in several languages highlighting Lowell's "Special Places."

#### New England Quilt Museum, Lowell, \$3,000

*From the Moses Greeley Parker Fund*

To purchase climate control equipment and collection storage materials.

#### Whistler House Museum of Art, Lowell, \$2,900

*From the Harold J. and Mildred LeClair Fund*

To photograph, update, and catalogue the Museum's permanent collection.

### Nonprofit Agency Endowment Funds

#### Lowell Historical Society, Lowell, \$2,794.87

#### Merrimack Repertory Theatre, Lowell, \$8,285.20

#### New England Quilt Museum, Lowell, \$5,528.67

#### Whistler House Museum, Lowell, \$236.52

### Designated Funds

#### American Textile History Museum, Lowell, \$15,323.77

*From the Anonymous and Nancy L. Donahue Funds*

#### Children's Museum of Lowell, Inc., \$5,053.08

*From the Nancy L. Donahue Fund*

#### Merrimack Repertory Theatre, Lowell, \$19,822.17

*From the Anonymous and Nancy L. Donahue Funds*

#### Whistler House Museum/Lowell Art Association, Lowell, \$6,316.34

*From the Nancy L. Donahue Fund*

### Donor Advised Funds

#### Whistler House Museum, Lowell, \$1,000.00

*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

For "Whistler Park - A Victorian Garden Project"

#### Merrimack Repertory Theatre, Lowell, \$690.53

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

#### Thayer Symphony Orchestra, Fitchburg, \$7,000.00

*An Advised Donation from the Enterprise Bank 9/11 Disaster Fund for Local Families*

## Economic and Community Development

### Capacity Grants

#### Coalition for a Better Acre, Lowell, \$3,000

*Funded by the Jessie B. Cox Charitable Lead Trust*

To hire a computer consultant to create a technology plan.

#### Merrimack Valley Housing Partnership, Lowell, \$1,000

*Funded by the Kelly Foundation*

For the executive director and assistant to attend a conference to become certified homebuyer counselors.

#### Lowell Telecommunications Corporation, Lowell, \$2,980

*From the Moses Greeley Parker Fund*

To strengthen its Information Technology component.

### Field of Interest

#### Small Business Assistance Center, \$2,600

*From the United Lowell Development Fund*

To present a summer series of International Antique and Artisan Fairs in association with the ONE Lowell: Building A New American Community project.

#### Small Business Development Center/One Lowell, \$2,600

*From the United Lowell Development Fund*

For promotion of the Antique and International Artisan Series

Arthur Geddes, a  
volunteer Community  
Producer at Lowell  
Telecommunications  
Corporation, at work  
on "The Issue At Hand,"  
a local cable television  
segment highlighting  
nonprofit organizations in  
the Greater Lowell area.







*Latin American Health Institute's  
community outreach team on  
Adams Street provides HIV/AIDS  
testing and distributes prevention  
education materials from their van*



*Environmental Cleanup  
by the Lowell Parks and  
Conservation Trust*

## **Donor Advised**

### **Back Central Neighborhood Association, Lowell, \$1,643.16**

*A Corporate Donor Advised Grant from the Enterprise Bank  
Community Gifts Fund*

To complete construction of the Rotary Park.

## **Education**

### **Designated Funds**

#### **Varnum Elementary School Library, Lowell, \$1,068.87**

*From the Marguerite H. Colgate Memorial Library Fund*

#### **Tufts University, Medford, \$5,135.34**

*From the Anonymous Fund*

## **Environment/Conservation**

### **Capacity Grants**

#### **Nashua River Watershed Association, Groton, \$2,735**

*Funded by the Jessie B. Cox Charitable Lead Trust*

For a direct mail campaign and advertisements.

#### **Organization for the Assabet River (OAR), Concord, \$3,000**

*Funded by the Jessie B. Cox Charitable Lead Trust*

To pay for a direct mail piece to boost OAR's membership.

#### **Lowell Parks & Conservation Trust, Lowell, \$2,129.44**

*From the Sudbury-Assabet-Concord (SuAsCo) Watershed Fund, a  
Northern Middlesex Water Resources Endowment Fund*

To develop and train a network of volunteers to monitor and  
restore vital wildlife in the Concord River.

#### **Merrimack River Watershed Council, Lawrence, \$2,083.64**

*From the Merrimack Watershed Fund, a Northern Middlesex Water  
Resources Endowment Fund*

To develop and distribute a report that examines the cumulative  
effect of water withdrawals from the Merrimack River.

#### **Nashua River Watershed Association, Groton, \$2,118.36**

*From the Nashua Watershed Fund, a Northern Middlesex Water  
Resources Endowment Fund*

To monitor watershed sites to identify and evaluate water quality  
trends, remedy potential pollution sources, and promote  
stewardship of bodies in the watershed.

### **Designated Grants**

#### **Nashua River Watershed Association, Groton, \$1,027.07**

*From the Anonymous Fund*

#### **New England Forestry Foundation, Groton, \$10,270.69**

*From the Anonymous Fund*

### **Nonprofit Agency Endowment Funds**

#### **Nashua River Watershed Association, Groton, \$2,118.36**

## **Health**

### **Capacity Grants**

#### **Latin American Health Institute, Boston, \$2,800**

*Funded by the Jessie B. Cox Charitable Lead Trust*

To purchase three computers for its Lowell office.

#### **Lowell Community Health Center, Lowell, \$3,000**

*Funded by the Jessie B. Cox Charitable Lead Trust*

To hire a consultant to create an educational video and  
fundraising materials.

### **Designated Funds**

#### **Deaconess Nashoba Hospital, Ayer, \$5,135.34**

*From the Anonymous Fund*

#### **Lowell General Hospital Cancer Center, Lowell, \$1,150.89**

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

## **Special Projects**

#### **UMass Lowell Research Foundation, Lowell, \$2,787.88**

*From a Grant by the Robert Wood Johnson Foundation*

To support the work of the Greater Lowell Asthma Awareness  
Coalition.



*The Grandparent Program at Girls, Inc. provides the opportunity for girls to interact with mentors and role models from communities and generations different from their own*

## **Philanthropy**

### **Designated Funds**

**Greater Lowell Community Foundation, Lowell, \$16,268.55**  
*From the Anonymous and Nancy L. Donahue Funds*

## **Religion**

### **Designated Funds**

**First Church of Christ, Lancaster, \$5,135.34**  
*From the Anonymous Fund*

**Oblate Mission Guild, Lowell, \$10,169.69**  
*From the Father Thomas J. Reddy Oblate Mission Guild Fund*

### **Donor Advised Funds**

**Academy of Notre Dame, Tyngsboro, \$1,000**  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

**Lowell Catholic High School, Lowell, \$1,217.13**  
*From the Harold J. and Mildred Leclair Fund*

## **Social Services**

### **Capacity Grants**

**African Assistance Center, Lowell, 1,000**  
*From the Moses Greeley Parker Fund*  
 To help establish the Center, which provides direct assistance and referrals to other public and private social service agencies.

**Alternative House, Lowell, \$3,000**  
*From the Founders Fund*  
 To produce training materials on the legal rights of immigrant women.

**Cameroonians of Lowell Association, Lowell, \$1,000**  
*From the Moses Greeley Parker Fund*  
 To add a phone line and expand its website.

**ReCreate, Lowell, \$3,000**  
*From the Moses Greeley Parker Fund*  
 To increase membership, expand geographic area, and create an advisory board.

**Elder Services of Merrimack Valley, Lawrence, \$1,250**  
*From the Founders Fund*  
 To translate training materials into Khmer and Portuguese.

**Greater Lowell Family Resource Collaborative, Lowell, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 To expand its current website and database to include suburban and regional nonprofit information.

**International Institute of Lowell, Lowell, \$3,000**  
*From the Founders Fund*  
 To purchase an updated computer and printer.

**Lowell Association for the Blind, Lowell, \$2,550**  
*Funded by the Kelly Foundation*  
 To purchase a computer and other technology for staff use and training.

**Lowell House, Lowell, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 To purchase two computers for residential staff use.

**M/A Com Food Share, Lowell, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 For a direct mail campaign.

**Massachusetts Alliance of Portuguese Speakers, Cambridge, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 To upgrade the server and network for its client database.

**ONE Lowell: Building a New American Community, Lowell, \$3,000**  
*Funded by the Kelly Foundation*  
 To organize and increase leadership participation of immigrants and refugees.

**Rape Crisis Services of Greater Lowell, Lowell, \$3,000**  
*From the Founders Fund*  
 To purchase and install a telephone and voice mail system to boost office efficiency.

**Roudenbush Community Center, Westford, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 To upgrade software systems.

**St. Julie Asian Center, Lowell, \$3,000**  
*From the Moses Greeley Parker Fund*  
 To purchase a computer and printer for staff use.

**Tewksbury Hospital Equestrian Farm, Tewksbury, \$1,500**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
 To purchase a computer to aid in website and organizational tasks.

### **Nonprofit Agency Endowment Funds**

**International Institute of Lowell, Lowell, \$309.69**  
*From the Alexander C. Anton and Charles J. Antonopoulos Fund*  
 For the International Institute of Lowell

**LifeLinks, Lowell, \$401.03**

### **Designated Funds**

**LifeLinks, Lowell, \$120.27**  
*From the Zaher-LaCouture-Galotta Family Fund*

**Retarded Adult Rehabilitative Association, Lowell, \$5,053.08**  
*From the Nancy L. Donahue Fund*

**United Way of Merrimack Valley, Inc., Ward Hill, \$1,150.89**  
*From the Ruth C. and John E. Leggat Fund*



## Donor Advised Funds

**Challenge Unlimited, Inc. at Ironstone Farm, Andover, \$690.54**  
*From the Ruth C. and John E. Leggat Fund*

**Community Teamwork, Inc., Lowell, \$2,500.00**  
*From the Harold J. and Mildred Leclair Fund*  
For CTI's Retired and Senior Volunteer Service Corps, which provides visits to seniors in their homes or at nursing facilities.

**Elder Services of the Merrimack Valley, Inc., Lawrence, \$2,500.00**  
*From the Harold J. and Mildred Leclair Fund*  
For services to elders who have no family members to provide them emotional support.

**Lowell Transitional Living Center, Lowell, \$5,250.00**  
*An Advised Donation from the Enterprise Bank 9/11 Disaster Fund for Local Families*

**Pathfinder/Milestone Homeless Services, Lowell, \$1,750.00**  
*An Advised Donation from the Enterprise Bank 9/11 Disaster Fund for Local Families*

**Tewksbury Hospital Equestrian Farm, Tewksbury, \$1,000.00**  
*A Corporate Donor Advised Grant from the Enterprise Bank Community Gifts Fund*

**Visiting Nurse Association of Greater Lowell, Inc., Lowell, \$690.53**  
*From the Ruth C. and John E. Leggat Fund*

## Youth Development

### Capacity Grants

**Action Committee for Teens Coalition, Concord, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
To establish an office for the Coalition.

**Boys and Girls Club of Greater Billerica, Billerica, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
To hire a consultant to create and maintain a website and provide staff training.

**Boys and Girls Club of Greater Lowell, Lowell, \$3,000**  
*From the Moses Greeley Parker Fund*  
To build and design a website for youth member education, community outreach, and fund development.

**Girls Incorporated of Greater Lowell, Lowell, \$3,000**  
*From the Founders Fund*  
To purchase computers and printers for staff use.

**Lowell Teen Coalition, Lowell, \$2,260**  
*Funded by the Kelly Foundation*  
To purchase equipment to facilitate Coalition services.

**Spar and Spindle Girl Scout Council, Inc., North Andover, \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
To purchase a laser copier.

**YMCA Massapoag Family Outdoor Center, Dunstable - \$3,000**  
*Funded by the Jessie B. Cox Charitable Lead Trust*  
To utilize the Internet in advertising and distribution of information.

**YWCA of Lowell, Lowell - \$3,000**  
*From the Moses Greeley Parker Fund*  
To purchase software to enhance fundraising management.

### Designated Funds

**Lowell High School, Lowell, \$4,725.75**  
*From the James Herscot Lacrosse Fund*  
For the purchase of lacrosse equipment to outfit economically underprivileged student athletes.

### Donor Advised Funds

**Adolescent Consultation Services, Inc., Cambridge, \$690.53**  
*From the Ruth C. and John E. Leggat Fund*

**Girls Incorporated of Greater Lowell, Lowell, \$690.54**  
*From the Ruth C. and John E. Leggat Fund*



*Lowell Association for the Blind provides life experiences, resources, activities and other support for visually impaired citizens and their families.*



*The St. Julie Asian Center provides English as a Second Language instruction and other services to new immigrants in the Lowell Area*

# 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, 2000	March 31, 2001	March 31, 2002	March 31, 2003 (unaudited)
<b>Assets:</b>				
Cash and Investments	\$4,797,090	\$4,573,010	\$5,553,863	\$5,355,881
Unconditional Promises to Give	132,966	62,064	56,229	1,036,229
Property, Equipment and Other Assets – Net	13,152	39,304	28,520	28,272
<b>Total Assets</b>	<b>\$4,943,208</b>	<b>\$4,674,378</b>	<b>\$5,638,612</b>	<b>\$6,420,382</b>
<b>Liabilities:</b>				
Accounts Payable/Accrued Expenses	5,476	11,596	9,495	4,718
Charitable Gift Annuities	0	10,645	14,638	18,565
Fiscal Agent & Agency Endowment Funds	107,921	235,258	395,257	440,100
<b>Total Liabilities</b>	<b>\$113,397</b>	<b>\$257,499</b>	<b>\$419,390</b>	<b>\$463,383</b>
<b>Net Assets:</b>				
Total Net Assets	4,829,811	4,416,879	5,219,222	5,956,999
<b>Total Liabilities and Net Assets</b>	<b>\$4,943,208</b>	<b>\$4,634,378</b>	<b>\$5,638,612</b>	<b>\$6,420,382</b>
<b>Support and Revenue:</b>				
<b>Total Support and Revenue</b>	<b>\$3,822,337</b>	<b>\$186,576</b>	<b>\$1,458,578</b>	<b>\$1,328,443</b>
<b>Expenses:</b>				
Grants and Scholarships	261,536	319,230	375,868	389,684
Other Programs	150,129	245,715	241,416	224,495
General Expenses	30,649	34,563	38,951	50,174
<b>Total Expenses</b>	<b>\$442,314</b>	<b>\$599,576</b>	<b>\$656,235</b>	<b>\$664,353</b>

G R O W T H   O F   A S S E T S

# greater lowell community foundation funds

## Nonprofit Agency Funds

### 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.

### Mary E. Harrington Fund\*

A permanent fund to support the administrative operations of the Greater Lowell Community Foundation.

### 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\*

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.

### 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.

### 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.



*The Merrimack Valley Housing Partnership conducts classes for first-time homebuyers and helps to increase the availability of, and access to, affordable housing in the Merrimack River Valley*



## Field of Interest Funds

### Lowell United Development Fund

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

## Designated and Multipurpose Funds

### Anonymous Designated Fund

Created with a gift in excess of \$1,000,000, this fund 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, created by a \$1,000,000 gift, has designated seven cultural, artistic, and philanthropic organizations as perpetual beneficiaries.

### 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 for an entering student from the immediate Lowell area, and a college scholarship to a Lowell High School graduating senior.

*Adolescents participating in the  
Massachusetts Alliance of Portuguese Speakers'*

*"Pilotando Minha Vida" (Piloting My Life).*

*These students had just taken part in a  
presentation on **The Dangers of Tobacco***



### 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.

### 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 Parks and Conservation 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, 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, Mass., to pursue study in the arts. It was established in memory of Ms. Progen, who perished 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 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.

### **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.

*Members of the Cameroonians Of Lowell Association (CAMOLA)*

*marching in the City of Lights Parade in Lowell. CAMOLA is one of many organizations supported by the Community Foundation serving Lowell's diverse immigrant populations*



#### **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<sup>th</sup>, 2001, Enterprise Bank and Trust Company collected donations to assist the families of local victims of the attacks. This fund ultimately amassed over \$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

## 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.

### Long-Term Funds

Edward J. Babigan Scholarship Fund  
 Walter A. Bacigalupo Memorial Scholarship Fund  
 Atty. Maurice Barlofsky Scholarship Fund  
 Bartlett School Alumni Scholarship Fund  
 Beaulieu/Kerouac Book and Poetry Prizes  
 Brian Belleau Scholarship Fund  
 Ruth I. Brennan Memorial Scholarship Fund  
 Charles A. and Mary Carlson Memorial Scholarship Fund  
 Thomas F. and Eileen Casey Scholarship Fund  
 Kimberly R. Clough Memorial Scholarship Fund  
 James F. Conway, Jr. Memorial Scholarship Fund  
 Colleen Creegan Memorial Scholarship Fund  
 Sarah Droney-McGurrin Scholarship Fund  
 Louis Fineman Scholarship Fund  
 Guy Franceschelli Scholarship Fund  
 Leo and Matthew Flynn Memorial Scholarship Fund\*  
 John J. Giblin Music Scholarship Fund  
 Thomas J. Hogan Scholarship Fund  
 John J. and Clara M. Hurley Memorial Scholarship Fund  
 A.H. Jubinville Scholarship Fund  
 William P. Kraines Memorial Scholarship Fund\*  
 Michael J. Kuenzler Wrestling Scholarship Fund  
 Athena Letsou Science Club Scholarship Fund  
 Lowell High School Alumni Scholarship Fund\*  
 Lowell High School Athletic Hall of Fame Medals\*  
 Lowell High School Class of 1946 Scholarship Fund\*  
 Lowell High School Class of 1948 Scholarship Fund  
 Lowell High School Class of 1952 Scholarship Fund\*  
 Lowell High School Class of 1959 Scholarship Fund  
 Lowell High School Class of 1960 Scholarship Fund\*  
 Lowell High School General Scholarship Fund  
 Lowell High School Latino Scholarship Fund\*  
 Lowell High School Memorial Scholarship Award  
 Lowell High School Student Scholarship Fund  
 Francis McHugh Memorial Scholarship Fund  
 Frank X. Moriarty Scholarship Fund  
 Supt. Henry J. and Teresa R. Mroz Scholarship Fund  
 Dennis J. and Lillian Murphy Scholarship Fund  
 Peter Nason Scholarship Fund  
 Pine St./Margaret R. Brady Scholarship Fund  
 Jane G. O'Connor McCarthy Scholarship Fund\*  
 Dana and Elizabeth Palmer Scholarship Fund  
 Katina-Pappas-Tsongas Scholarship Fund  
 James A. Patterson Memorial Scholarship Fund

Brian F. Reynolds Student Athlete Scholarship Fund  
 Dr. Joseph R. Rocha NAACP Scholarship Fund\*  
 Georgia Sarris Memorial Scholarship Fund  
 Edward Everett Sawyer Scholarship Fund  
 Thomas "Tiny" Sheehan Scholarship Fund  
 Frederick Slavin Track Scholarship Fund  
 Linda Sousa Memorial Scholarship Fund  
 Peter S. Stamas Scholarship Fund  
 Sullivan Middle School PTO Scholarship Fund  
 Brian P. Sullivan Memorial Scholarship Fund  
 Dr. Joseph D. Sweeney, M.D., Science Award  
 Gertrude Thomas Memorial Scholarship Fund  
 B. Douglas Townshend Choral Society Scholarship Fund  
 Ellenor Trull Scholarship Fund  
 George N. Tsapatsaris Scholarship Fund  
 United American Energy Scholarship Fund  
 William Woodcock Scholarship Fund  
 Zaher-Lacouture-Galotta Family Fund

### Annual Funds

All City Sports Promotion Scholarship Fund  
 Howard Beck BTU International Scholarship Fund  
 BFI Management Scholarship Fund  
 Bon Marche Trust Scholarship Fund  
 Albert & Doris Bourgeois Award  
 Iris Boutsellis Scholarship Fund  
 Butler Bank Scholarship Fund  
 Andrew Cavossa Scholarship Fund  
 Coakley Family Scholarship Fund  
 Community Players Scholarship Program  
 John Harrington Costello Memorial Fund  
 C.R. Bard Foundation Inc. Scholarship Fund  
 Barry F. Cronin Scholarship Fund  
 Philip T. Dancause Scholarship Fund

Explorer Scholarship Fund  
 Family Bank Scholarship Fund  
 Fleet/Sovereign Bank Scholarship Fund  
 FW Russell & Sons Scholarship Fund  
 Christos Georgoulis Scholarship Fund  
 Highland Players of Lowell Scholarship Fund  
 Rita Lamond Memorial Scholarship Fund  
 John P. Leary Memorial Scholarship Fund  
 Lowell Co-operative Bank Scholarship Fund  
 Lowell CoGeneration Scholarship Fund  
 Lowell Five Cent Savings Bank Scholarship Fund  
 Lowell Soccer Cross Country Scholarship Fund  
 Lowell Regional Transit Authority Scholarship Fund  
 Lowell Road Runners Cross Country Scholarship Fund  
 Lowell Sun Charities, Inc. Scholarship Fund  
 Al Mangan Memorial Scholarship Fund  
 MassBank Charitable Scholarship Fund  
 Mass Cultural Facilities Scholarship Fund  
 Mass Electric Scholarship Fund  
 Robert C. "Doc" McAnespie Scholarship Fund  
 Muro Pharmaceutical, Inc. Scholarship Fund  
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*\* Denotes fund established in 2002/2003*



*Charlie Ryan talks strategy with Lowell High basketball team.*



# 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.

*(see next section on planning your gift for later).*

## **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.

# generous donors

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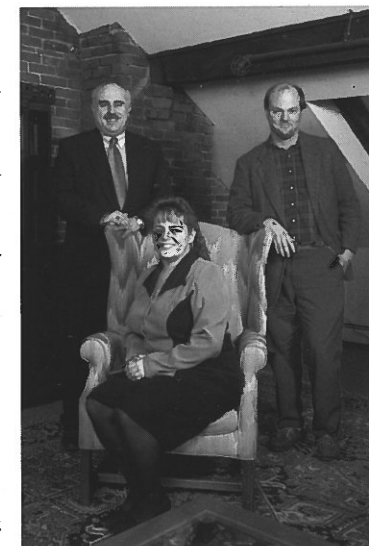


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