

# ESSEX COUNTY COMMUNITY FOUNDATION

FROM SUCCESS TO SIGNIFICANCE

ANNUAL REPORT 2013



# 15 YEARS

SERVING DONORS AND NONPROFITS IN ESSEX COUNTY, MASSACHUSETTS.

Dear Friends and Neighbors,

Think about the catchphrase *From Success to Significance*. It describes not just growth, but also increased meaning and value. At 15, your Community Foundation is in such a passage. Grantmaking by our Family of FundHolders doubled this year to \$4.5 million, creating twice as much impact in the services of its carefully chosen nonprofit recipients. The Institute for Trustees and Youth at Risk conferences were both sold out, with over 1100 attendees between them. The knowledge gained by leaders of nonprofits and those supporting our youth will clearly lead to better services in their respective organizations. ECCF staff gave advice and counsel to hundreds of Essex County nonprofits this year, and each of them has made important progress in governance, fundraising, compliance, and mission. In addition, a study of the nonprofits that have won competitive grants from the region's leading foundations in 2013 shows that over 90% of them are involved in the institutional advancement programs of ECCF's Center for Nonprofit Excellence.



It's working! Everyone who made gifts to ECCF's record-breaking fundraising year can share in the impact of collaborative, strategic philanthropy. Your return on investment is better every year. Nonprofits here accomplish more every year. And our thanks to you are more heartfelt every year. Thank you!

Dave Welbourn, *President and CEO*

## The Tao of ECCF

We asked, 'how can we explain quickly and visually what ECCF does?' Remembering the Yin Yang graphic, we saw that it applied perfectly to ECCF's dual mission of promoting philanthropy and strengthening nonprofits—each aspect drives and complements the other.

### Promoting local philanthropy

Many people want to give back to their communities to make a meaningful difference where they live. As trusted community-based stewards of charitable funds, ECCF partners with individuals, families and businesses to set up funds that will maximize their charitable impact, reflect their values and interests and leave a lasting funding source for local causes.

### Strengthening the nonprofit community

We believe the diverse missions of the thousands of nonprofits in the region and the passion of their founders and leaders is what improves the quality of life for all here in Essex County. Affordable housing, job training, food assistance, land and historical preservation, education, healthcare, art, music and theater are all community service initiatives run by nonprofits. It is these organizations, formed to address a need in society, that create better, happier, healthier lives for the people they serve. ECCF was created to support them by awarding grants and by offering training and counseling to their leaders and staff to help improve the capacity and efficiency of their programs.





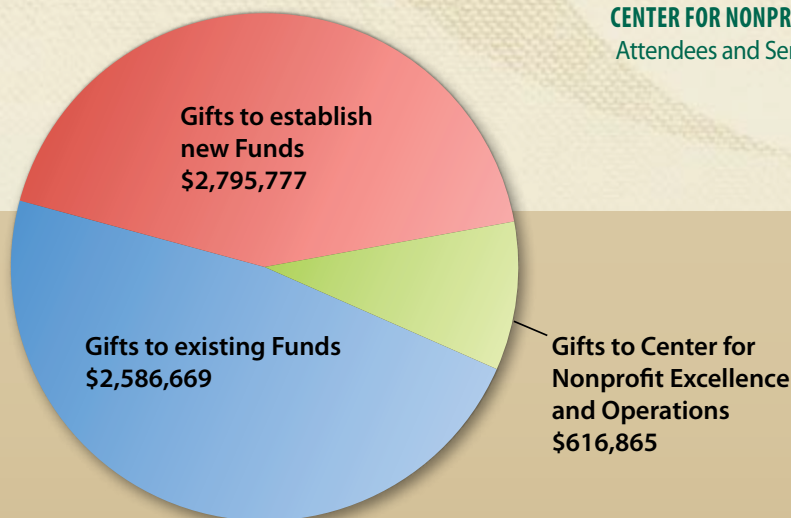
# 2013: A Milestone Year

IN 15 YEARS

IN 2013

2013 BROKE RECORDS FOR THE COMMUNITY FOUNDATION ON EVERY FRONT—MORE GIFTS IN, MORE GRANTS OUT AND MORE ATTENDEES TO OUR CNE PROGRAMS. OUR GROWTH CONFIRMS THE SIGNIFICANCE OF ECCF AS A LOCAL PHILANTHROPIC HUB AND SOURCE OF KNOWLEDGE AND EXPERTISE FOR THE NONPROFIT COMMUNITY.

## GIVING IN 2013



**131**  
Charitable Funds

OVER **\$22 million**  
ASSETS UNDER MANAGEMENT

OVER **4,000**  
Grants & Scholarships Awarded

OVER **\$19 million**  
Awarded in Grants & Scholarships

OVER **10,000**  
CENTER FOR NONPROFIT EXCELLENCE  
Attendees and Service Recipients

**14**  
New Funds

**\$6 million**  
IN GIFTS

**571**  
Grants & Scholarships Awarded

**\$4.5 million**  
Awarded in Grants & Scholarships

**1,800**  
CENTER FOR NONPROFIT EXCELLENCE  
Attendees and Service Recipients

## *Professional Advisors Committee formed*

Professional advisors are essential stakeholders in helping ECCF promote philanthropy in Essex County. ECCF works closely with them to help clients achieve their charitable goals. We are pleased to have their leadership as we expand philanthropic resources in and for the region.



# Donor Funds

## 131 and counting

### *New Funds in 2013*

#### **THE BEYOND SCHOLARSHIP FUND**

Provides scholarships for Lawrence students to attend a tuition based high school.

#### **ANDREWS CHAPEL RESTORATION FUND**

Supports the restoration and maintenance of the interior of the Andrews Chapel in the Swampscott Cemetery.

#### **TERESA HOPPER LACHANCE SCHOLARSHIP FUND**

Provides college scholarships to graduating seniors of Georgetown High School.

#### **FUND FOR LAWRENCE PUBLIC SCHOOLS RECEIVERSHIP AND TURNAROUND PLAN**

Funds projects created by the Lawrence Receiver to revitalize Lawrence Public Schools.

#### **MYOPIA HUNT CLUB CADDIE SCHOLARSHIP FUND**

Provides scholarships for eligible Myopia Hunt Club caddies.

#### **NORTH SHORE COMMUNITY HEALTH NETWORK FUND**

Supports community health initiatives.

#### **NORTH SHORE TECHNOLOGY COUNCIL SCHOLARSHIP FUND**

Awards scholarships to selected students.

#### **FUND FOR THE REPUBLIC**

Funds national efforts to effect money-in-politics reform.

#### **SOLSTICE SINGERS SCHOLARSHIP FUND**

Provides scholarships for graduating members of Harmony and Concert Choir at Hamilton-Wenham Regional High School.

#### **STIRLING A. WINDER FUND**

Supports Osteosarcoma research.

The following funds were established to support charitable programs of interest to the donors:

#### **DONALD AND SUSAN BOOTH CHARITABLE FUND**

#### **MADLMU FUND**

#### **NIBEN POINT FUND**

#### **RICHARD D. WILSON COMMUNITY RESPONSE GIFT FUND**

A DONOR FUND AT ECCF is a smart and flexible way to make the most out of what you give. Working with ECCF can help you develop an approach to philanthropy that reflects your personal values, interests and concerns. You'll have opportunities to learn about community issues, effective organizations and strategic grant making. Our staff's active engagement and community involvement with the 34 cities and towns of Essex County can help maximize your giving to causes that matter most to you.

We share a mission with the other 900 community foundations around the country to help solve issues in our local communities, and to help individuals and families make their own charitable giving more effective and satisfying. Help is available to you at every stage of giving—we share your passion to make a difference.



**Jay Caporale**, *Executive Vice President & Director of Philanthropy*

### **FUND HIGHLIGHT**

Beauport Financial Services, LLC began a company tradition of giving away 10% of its annual net operating profit to charities in the Cape Ann community. Their mission is "to offer financial support for charitable nonprofits to make an immediate and lasting impact by actively sharing our blessings with those in need in our community." To formalize the tradition and ensure that it continues, founders David McKechnie and Derek Reed established the Richard D. Wilson Community Response Gift Fund at ECCF. Beauport employees will be active members of the Fund's advisory committee and will select grant requests for nonprofits that make a difference in their community. The Fund's first 2013 grant was awarded to The Grace Center, a drop-in center working with at-risk residents of Cape Ann. ECCF is pleased to welcome Beauport Financial to our Family of Funds.

See the Grants page for Grant Making Highlights.



THE CENTER FOR NONPROFIT EXCELLENCE (CNE) is a leading resource for nonprofit staff and board leadership to accelerate their knowledge base and run their organizations more effectively. Whether it is learning the basics of fundraising, receiving advice on launching a capital campaign, gaining knowledge about finance, or learning how to improve and build their board, the CNE is the gold standard for nonprofit education and training in Essex County. Each year we deliver upon the promise of exemplary content, accomplished teachers and affordable access. We pride ourselves on our dual ability to stay in tune with the trends in the philanthropic marketplace and the needs of our constituents.

**Julie Bishop**, Vice President of Grants & Services  
and **Carol Lavoie Schuster**, Assistant Manager of Grants & Services



## CNE 2013 Stats

### WORKSHOPS

9 workshops | 525 attendees  
250 organizations represented

### INSTITUTE FOR TRUSTEES

21 workshops | 400+ attendees  
162 nonprofits represented  
Keynote: Bill Cummings

### YOUTH AT RISK CONFERENCE

25 workshops | 700+ attendees  
227 organizations represented  
Keynote: Michael Thompson Ph D.

### EBSO PUBLISHING GRANTS RESOURCE CENTER AT ECCF

122 grant writers, nonprofit staff and  
volunteers used this free resource to  
research foundations.

### CONSULTING

41 nonprofits received in-depth  
consulting with ECCF leadership.

Learn more about these programs  
and more at [www.eccf.org/cne](http://www.eccf.org/cne)

## 2013 CNE DISTINCTIONS

ECCF's Center for Nonprofit Excellence has earned two important distinctions from New England's biggest new foundation.

- The Cummings Foundation granted ECCF's CNE \$100,000 over three years, helping expand its services to nonprofits to meet rising demand.
- The Cummings Foundation also awarded \$100,000 to 19 other Essex County nonprofits. Remarkably, every one of them has benefited from the expertise of the CNE and most have received grants from ECCF's Family of Fundholders.

Charitable organizations all across the County grow stronger by participating in the CNE, and ECCF donors are seeing a return on this investment.

*"If I could only attend one conference a year, it would be this one."*

► INSTITUTE FOR TRUSTEES ATTENDEE

*"YAR is inspiring, informative and does an amazing job of connecting people who need to be connected. It is a can't miss event for any youth service provider in Essex County."*

► THOMAS BENTLEY, BIG BROTHERS BIG SISTERS OF MASS. BAY

# Center for Nonprofit Excellence





# Grant Making Highlights

ECCF PROUDLY DISTRIBUTED A RECORD \$4.5 MILLION in grants and scholarships from the Foundation's 131 charitable funds. Our donor advisors have put ECCF in the top 5% of community foundations in its rate of generosity by granting from their assets at a rate 3x the national average. While we especially promote local giving, our grants help fund initiatives far and wide. In 2013 our grant making reached 19 states and one foreign country.

**Julie Bishop**, *Vice President of Grants & Services*

## 2013 Grant Stats

### DONOR FUNDS

**260 grants | \$3,528,175**

As the building blocks of the Community Foundation, Donor Funds award the majority of our grants to the hundreds of nonprofit recipients in the region and beyond. Of special note this year was a grant of \$350,000 made by The Reid Sacco Cancer Research Fund to establish the Reid Sacco Center for Young Adult Cancer at Tufts Medical Center. After years of building this Fund at ECCF for the purpose of alleviating young adult cancers, a milestone was met and a dream came true.

### SCHOLARSHIP FUNDS

**109 scholarships | \$102,980**

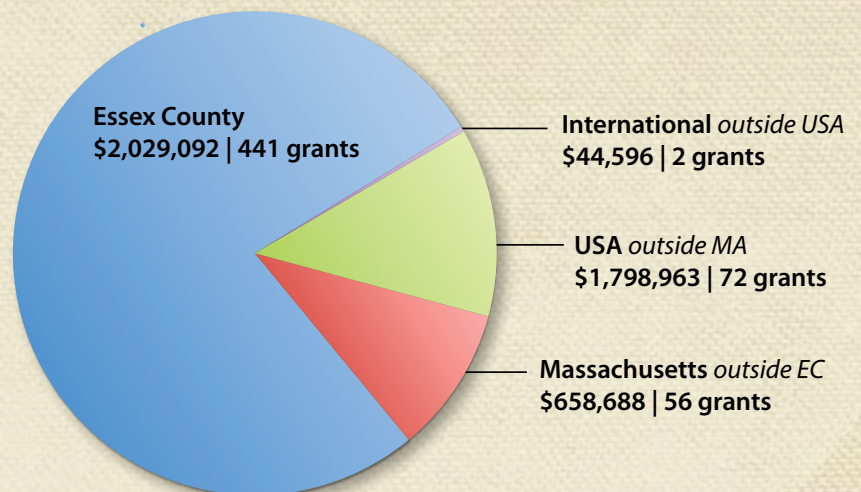
ECCF is home to a variety of scholarship funds established by individuals and groups of donors. We are proud to support the academic goals of our local youth.

### COMPETITIVE GRANT PROGRAMS

**202 grants | \$900,184**

The Competitive Grant Programs are charitable funds that invite nonprofits to submit proposals for funding. Evaluations of proposals are done by selection committees and usually include site visits to see the nonprofit programs in action. Our Competitive Funds are: Betty Beland Greater Lawrence Summer Fund, Discretionary Fund, F1rst Jobs, Hardscrabble Education Fund, Merrimack Valley General Fund, Webster Family Fund and The Women's Fund of Essex County.

## GRANTS BY GEOGRAPHIC REGION



"Dear Friend of Camp, Thank you for the money so that girls go to camp. My name is Sophia and my favorite activities are sailing and swimming."

► SOPHIA, A GLSF CAMP PARTICIPANT

"The glidescope you helped fund will save lives in our community for many years to come. Thank you for your generosity and support and for all you do to make the Merrimack Valley a wonderful and healthy place to live."

► WILLIAM PARKINSON, LAWRENCE GENERAL HOSPITAL



# Leadership Highlights

## CONTINUING THE MOMENTUM, ECCF WELCOMES NEW BOARD CHAIR

ECCF enters its new fiscal year with some healthy momentum and I'm feeling very lucky to be receiving the baton from Joe Grimaldi at this point in our organizational life. Our existing programs reflect record attendance in FY 2013; the number of nonprofits we've worked with in the county is up double-digits, and our funding base is expanding. These all point to some terrific opportunities ahead for ECCF, both with our current core programs and with some new initiatives as well.

As the community foundation for one of America's oldest and most charitably inclined counties, ECCF has an important role to play in promoting philanthropy: increasing the store of capital and promoting responsive and effective giving across generations; and strengthening the nonprofits that convert that philanthropic support into real programs that touch the 750,000 people that live here. One of the greatest pleasures of working with ECCF is the opportunity to see the terrific, creative work being done by organizations across the county to improve our lives and those of our neighbors in a diversity of ways.

We can be justifiably proud of what ECCF has achieved, of its Trustees past and present, and of highly motivated and experienced staff who strive every day in their work to set and then meet the high standards we promote as an organization. I'm also keenly aware of what it will take to sustain all of those good things, and look forward to working with donors, board members, and community leaders to see that we at ECCF continue to do our part for Essex County.

**Jonathan Payson**  
*Chairman of the Board*



**ECCF FOUNDER, DAVID TORY,  
RECEIVED AN HONORARY  
DOCTORATE IN MAY FROM  
SALEM STATE UNIVERSITY FOR  
HIS PHILANTHROPIC WORK IN  
ESSEX COUNTY.**



*David Tory with Salem State President and ECCF Trustee, Patricia Meservey, at the graduation ceremony.*

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## FISCAL YEAR ENDING JUNE 30, 2013

### ECCF STAFF

Dave Welbourn  
*President & CEO*

Jay Caporale  
*Executive Vice President &  
Director of Philanthropy*

Julie Bishop  
*Vice President of Grants & Services*

Joan Henkels  
*Grants Assistant (Temporary)*

Pat Kelleher  
*Philanthropy & Donor Services*

Kathy Moriconi  
*Grants & YAR Coordinator*

Carol Lavoie Schuster  
*Assistant Manager of Grants & Services*

Susan Perry  
*Controller*

Nadia Prescott  
*Grant Writer (Consultant)*

Jonah Ruh Roberts  
*Web & Communications Manager*

### BOARD OF TRUSTEES

Joe Grimaldi, Chair  
*Mullen*

Michael Prior, Vice Chair  
*Atlantic Tele-Network*

Allan Huntley, Treasurer  
*501Partners*

Rosalin Acosta  
*TD Bank*

John Brooke  
*Brooke Private Equity Associates*

Steve Cohen  
*The Negotiation Skills Company*

David Dearborn  
*Community Volunteer*

Anne Dodge  
*Community Volunteer*

Matthew P. Doring  
*Hinckley, Allen & Snyder*

Robert R. Fanning, Jr.  
*Northeast Health Systems (retired)*

Susan J. Gray  
*Community Volunteer*

Patricia Maguire Meservey  
*Salem State University*

Jonathan Payson  
*Wellington Management Company (retired)*

Richard L Sumberg  
*The Financial Advisors*

Kevin M. Tierney, Sr.  
*Saugusbank*



Essex County  
Community Foundation