

.....  
"To wake up each morning with the core belief that I, individually and within a group, can make the world a better place now and for future generations."

.....  
"I change the world one child at a time!"  
.....

.....  
"Connect kids to nature to save earth's biodiversity and natural resources for the benefit of all."

.....  
"Making a difference in the lives of people with disabilities so that the world will be a better place because of my existence."  
.....

.....  
"My time and support can make a difference."

.....  
"To heal broken people in the neediest places and from the poorest circumstances in the world."

.....  
"My mission is to teach my child to be self sacrificing and to care about others."

.....  
"Eliminating economic disadvantage as a barrier to educational opportunity and advancement, believing that education is the great equalizer."

# This is what *Inspires* us...

.....  
"I believe children and their mothers should have shelter as a first step out of poverty, and I love using my gifts to help."

.....  
"I want to make all the world care about the ocean's health and its ability to sustain all life in the world."  
.....

.....  
"I seek to translate my religious faith and values into action and gifts to change the world."

.....  
"Help and support others to rewrite the script others have imposed on them."  
.....

.....  
"I am on a mission to stop the stigma of mental illness."

.....  
"I was told by others that I had much to give in areas I never thought of before - and discovered this was true and discovered also the pleasure that this giving gives me."

.....  
"Respect and dignity for all: rich, poor, abled, disabled, educated, undereducated..."

# Your passion to serve humanity through philanthropy and nonprofit initiatives is what drives us.

Whether it be through financial support to the causes you care about, or the hands and hearts on the ground working directly to meet community needs, ECCF helps donors and nonprofit leaders make our communities stronger, healthier and happier. We do this in three ways: by helping donors establish charitable funds to coordinate and maximize their giving, by awarding grants and scholarships through these funds, and by offering training and education to nonprofit leaders and staff, giving them the knowledge and tools to increase the impact and effectiveness of their programs.

"Housing is a right not a privilege."



"I want to help break the cycle of family violence and abuse that I myself have experienced and survived."

**About the Quotes:** At the Institute for Trustees this past March, keynote speaker Karen Ansara asked attendees what their personal missions were. The quotes on the cover and throughout this report are some of the words they shared. The range of interests and heartfelt responses are truly inspiring and show the passion of those serving the nonprofit sector and why ECCF is devoted to supporting them. Read more at [www.eccf.org/IFT-2012](http://www.eccf.org/IFT-2012).

## Dear Friends and Neighbors,

ECCF watches its peer groups for good ideas and benchmarks, so I attended the national meeting of community foundation leaders in New Orleans in September. I came away with the confirming message that Essex County and its donors face a healthier balance of needs and opportunities than the great majority of other communities around the country, and our Community Foundation is increasingly distinguished.

ECCF's thoughtful family of Fundholders grants out almost 12% of its principal annually—more than double the national average. In addition, ECCF continues to excel in services to nonprofits. The Institute for Trustees and the Youth at Risk Conference are exemplary programs becoming known nationally. Our work on leadership development and compliance, and our standards and performance in investment management, insert us in wide-ranging conversations about best practices. Though this Community Foundation is not yet a big one, it is producing value and appreciation near and far.

For almost 400 years the people of Essex County have demonstrated their faith in charitable organizations and now, in the 21st Century, we have our young Community Foundation to strengthen this faith by teaching best practices, developing efficiencies, strengthening governance and promoting philanthropy. The news in this Annual Report is evidence of a caring, generous community of leaders in a place we're all proud to live. Thank you for countless gifts of time, talent and treasure to so many good causes!

**Dave Welbourn, President and CEO**

"Never stop giving back to honor what you have been given."

# Funds & Giving

Charitable funds are the backbone of the Community Foundation and the causes they champion are diverse. From Donor Advised Funds established to support a donor's favorite causes, to Scholarship Funds created in memory of a loved one, to Agency Funds set up to provide ongoing support for an organization's programs, the Foundation continues to help people create funds uniquely tailored to their charitable objectives.

1,928 gifts to the  
Community Foundation  
in 2012 totalled  
\$3,480,316

## NEW FUNDS

ECCF welcomed 14 new funds in 2012, each with a unique funding interest.

- Setting up a fund is easy and rewarding! Contact us to learn more or visit [www.eccf.org/start-fund](http://www.eccf.org/start-fund)

### The BEYOND Scholarship Fund

Provides scholarships for Lawrence students to attend tuition based high schools.

### The Boxford Town Library Fund

Supports construction projects, maintenance and upkeep of the Boxford Town Library.

### Friends of Anne Bradstreet

Fosters appreciation of the life and work of Anne Bradstreet, the first female published poet in Colonial America.

### Grimaldi Fund

Supports nonprofit programs serving education, youth and community.

### Chet and Will Griswold Suicide Prevention Fund

Supports programs and research aimed at preventing suicide.

### JCH Fund

Brings the next generation of a family of donors into the world of philanthropic giving.

### Rolling Ridge Retreat and Conference Center Fund

Provides operational support for the Conference Center.

### The Scholars' Fund

Provides scholarships to graduates of Lawrence Family Development Charter School to attend tuition based high schools.

### Peter and Kathleen van Demark Fund

Supports nonprofits in Essex County in the areas of arts and culture, the environment and hunger relief.

The following Funds were each established to support programs of specific interest to the donors.

### The 82491 Fund

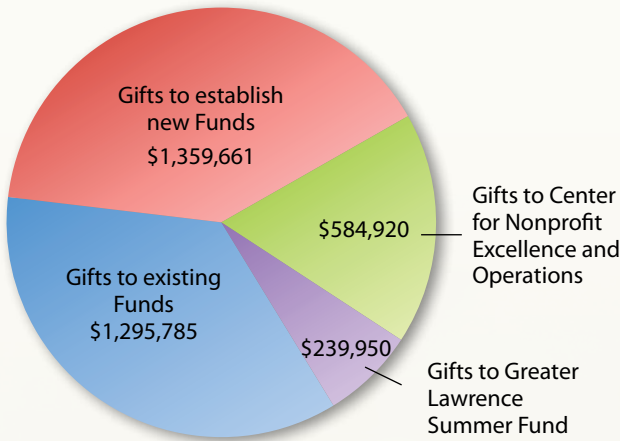
### Cloven Rock Fund

### The JT ECCF Fund

### Raymond Banigan Malm Foundation Fund

### Danielle Yagjian Fund

## GIVING IN 2012



My kids are now young adults and I wish to instill in them the value of giving back to the community. The JCH Fund will give them a starting place to get involved.

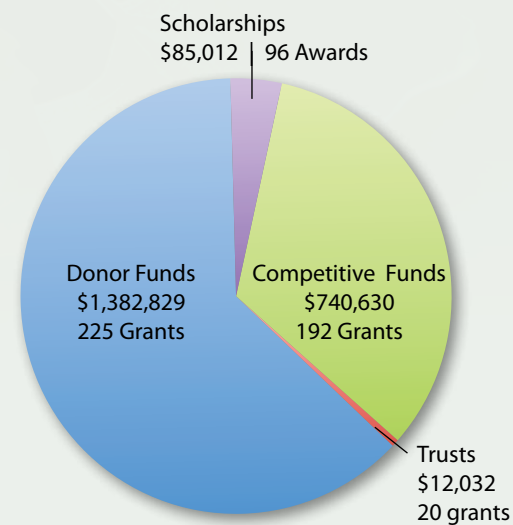
— Allan Huntley, JCH Fund



# Grant Making Highlights

ECCF's family of Funds and competitive grant making programs provide valuable resources to local nonprofits as well as national and international initiatives. In 2012, ECCF awarded 533 grants totaling \$2,220,503 to nonprofits, public schools and students in Essex County and beyond.

## GRANT MAKING



## Rosman Family Fund helps commemorate iconic event

The Bread and Roses Strike in 1912 was an important historic event that changed American labor laws for all time. The Rosman Family Fund supported many efforts to celebrate the centennial anniversary of the Strike. They were active members of the Centennial Committee and awarded grants that supported the festival operations, the Lawrence History Center, two exhibits at the Everett Mill, and an exhibit at Lawrence Heritage State Park.

"It was our major goal to ensure that educational and cultural activities reached out not just to historians but above all to the present day community."  
— Jurg and Linda Siegenhaler, Rosman Family Fund



## Helping a dream become a reality

I'm a girl whose dreams are bigger than the Atlantic Ocean. My name is Yairys Urena and I was born in the City of New York but raised in Lawrence, MA. I attended Lawrence Family Development Charter School and proudly graduated from Lawrence High. I will be attending my dream school—Saint Joseph's College—in the fall, majoring in biology where I will be focusing my mind and heart on becoming a veterinarian. I just wanted to tell you how grateful I am that you're helping make my dreams a reality. I wish I could hug you all but hope my words will do the actions. I hope you continue helping kids out with their dreams, because you sure did inspire me to help and contribute to others. Thank you! — Yairys Urena, Lawrence High School Alumni Association Fund scholarship recipient

"I want to lead as a participant, with humility, respect and openness."

## COMPETITIVE GRANT MAKING PROGRAMS

ECCF's competitive grant making programs invite nonprofits to apply for funding. Proposals are evaluated and awarded by selection committees.

ECCF encourages donors to create new competitive grant making funds to serve a particular region or field of interest. Please contact Julie Bishop to learn more.

## BETTY BELAND GREATER LAWRENCE SUMMER FUND

**\$235,435 | 39 grants**

Thousands of inner-city youth were given opportunities for summer recreation and enrichment activities. Funded programs enable at-risk youth to continue learning and engage in positive pursuits over the summer.

## DISCRETIONARY FUND

**\$20,000 | 12 grants**

From staff development to strategic plans, this Fund supports projects that will improve the efficiency and capacity of Essex County nonprofits.

## FIRST JOBS

**\$36,139 | 17 grants**

Nonprofits were awarded funding to hire teens for summer employment. Managed by the North Shore Workforce Investment Board, the program introduces youth to the workplace and provides nonprofits with summer interns.

## HARDSCRABBLE EDUCATION FUND

**\$265,656 | 71 grants**

Funding enabled public schools in Beverly, Lynn, Marblehead, Nahant, Salem and Swampscott to purchase SMART Boards, ipads, calculators, books, laboratory equipment and curriculum enhancements.

## MERRIMACK VALLEY GENERAL FUND

**\$45,100 | 21 grants**

Grants supported: stocking shelves at local food pantries, activities for Alzheimers patients, print materials for a local history education program and volunteer advocate training for juvenile case work and other important initiatives.

## WEBSTER FAMILY FUND

**\$55,800 | 19 grants**

This Fund supported capital improvement projects, including: replacing windows at an emergency shelter, purchasing a 12 person van for youth programming, computer replacements, and sound and theater equipment for a music and drama program.

## WOMEN'S FUND OF ESSEX COUNTY

**\$102,500 | 13 grants**

This year's Field of Funding supported the economic self-sufficiency and security of women and girls, including financial literacy for Hispanic women, housing and economic stability for victims of domestic abuse, life skills for girls, and Mediclerk job training and placement.

## Toward environmental sustainability

ECCF and its family of Funds granted over \$400,000 last year to programs directly supporting sustainability and the environment. These grants supported land conservation at Trustees of Reservations, Essex County Greenbelt and Dennis Conservation Trust. Other grants supported the Environmental Defense Fund, the Ocean River Institute and Fundacja Sendzimira, which supports environmental projects in Poland. A consistent theme in the grant making in this field is education—promoting efforts that will help achieve a *culture* of sustainability. Of particular note are grants made to Second Nature, an organization that works with academic leaders at universities and colleges to initiate a systemic societal change in which the principles of sustainability are integrated into all systems—business, social, economic and political. To this end, ECCF also continually supports youth programs aimed at instilling a love and care for the environment.



## Addressing basic needs

The need for emergency food assistance continues to rise. At Lazarus House, just one of the soup kitchens serving Lawrence, 65,666 meals were served last year and 74,880 bags of nutritionally balanced groceries were distributed. ECCF helped provide support to these programs through the Webster Family and Merrimack Valley General Funds.



"Thank you so very much for your ongoing support of Lazarus House in so very many ways. This grant will be used immediately to enhance the services we offer our guests. We consider you wonderful partners and are grateful and honored by our association with you and the wonderful work you do."

— Bridget Shaheen, Lazarus House Ministries



# Center for Nonprofit Excellence

The Center for Nonprofit Excellence provides comprehensive educational and networking resources to help nonprofit board and staff members improve the effectiveness of their organizations. The Center provides workshops on leadership and management topics, the annual Institute for Trustees and Youth at Risk Conferences, consulting, online tools, free access to the EBSCO Publishing Grants Resource Center at ECCF, administrative expertise, financial advice, and management of assets for nonprofits.

In 2012, the Center expanded its impact in all areas of training and services for nonprofits:



## WORKSHOPS

**10 workshops | 373 attendees | 142 nonprofits represented**

Workshops on a range of leadership and nonprofit management topics.

*"I feel that all of the workshops that I attended at ECCF have given me great information that I have been able to bring back to the office and utilize. I really enjoy getting the chance to educate myself and be around others who share the same passion for working in the nonprofit field."*

– Leiza Grissino, Lucy's Love Bus



## INSTITUTE FOR TRUSTEES

**365 attendees | 176 nonprofits represented | 2 keynote speakers  
17 workshop sessions | après institute social**

An annual all-day conference for board members and executive directors.

*"All of us were very impressed with the excellence of ECCF's insight, organization and scope of the conference and with the content of the sessions we attended. What we came away with will provide the framework for us to develop our first written strategic plan and start to define the role of an advisory board. Thank you."*

– John Bacon, Middle Street Team



## YOUTH AT RISK CONFERENCE

**734 attendees | 250 organizations represented | 2 keynote speakers | 23 workshop sessions | youth music presentation**

An annual all-day conference for youth service providers.

*"The subject matter is so important. [The conference] was very well organized, the spirit was wonderful and the opportunities to counsel with other service providers and keynotes were amazing."*

– YAR Attendee



## CONSULTANT WORK

**Over 70 consultant projects for nonprofit boards and staff**

Consultant work by ECCF senior staff on strategic planning, campaigns, board development and annual 'Advance' facilitation.

*"I just want you to know the Greenbelt board is advancing(!), and the session you facilitated for us had much to do with changes we are making. We are now using the consent agenda, planning regular executive sessions and developing board goals for the year. Thanks so much for helping us move Greenbelt from 'great to fabulous'!"*

– Holly Langer, Essex County Greenbelt



## EBSCO PUBLISHING GRANTS RESOURCE CENTER

**80 grant writers and nonprofit staff since opening in January**

A free portal at ECCF for nonprofits to research local, national and international foundations for new sources of funding.

*"We are so grateful that we have discovered Essex County Community Foundation and all its wonderful people and resources. The staff is hospitable and helpful, the workshops are energizing and engaging and, most recently, we visited the Grants Resource Center, which has opened up many avenues for potential funding. For us, and surely many others, ECCF is an opportune, invaluable partnership for professional and institutional development!"*

– Anne Connolly & Helene Tassone, ConSoné Academy

Improving the governance and productivity of nonprofit organizations is an essential part of all we do. It has an exponential impact: the better an organization is managed, the more donors trust it. As ECCF deepens its training and consulting, demand for these services is quickly outpacing our ability to meet every request for help.

■ We invite you to learn more about the Center and help sustain and expand this important work. Please contact Dave Welbourn or Jay Caporale to find out how to get involved.

## Tapping into knowledge, skills and support

I met Dave Welbourn at an event soon after I became Executive Director of Port Media and since then I have attended every ECCF workshop I could, including the Institute for Trustees 3 times. Everything I know about managing a nonprofit, I have learned through ECCF. Running a nonprofit is intense, you have to know about HR, the laws, compliance, how to manage your board and more. With the knowledge that I have gained, I have been able to work more effectively with our staff and board to better achieve our mission. ECCF workshops also make me feel more connected to my job, like I am not alone in my little office, but that I have support and that I am part of the larger effort of people caring for and serving their communities.

– Sarah Hayden, Executive Director, Port Media Community Access Television



*"Taking the potential that is everywhere and making it work."*

*"I want to inspire my children and the children of my community to care for the earth as part of a lifetime journey."*

*"I am beginning to acknowledge that my journey is about the connection and power between the arts and social responsibility."*

*"Everything I know about managing a nonprofit, I have learned through ECCF."*

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## FISCAL YEAR ENDING JUNE 30, 2012

### ECCF STAFF

Dave Welbourn  
*President & CEO*

Jay Caporale  
*Executive Vice President &  
Director of Philanthropy*

Julie Bishop  
*Vice President of Grants & Services*

Carol Lavoie Schuster  
*Assistant Manager of Grants & Services*

Pat Michaud  
*Donor Services*

Kathy Moriconi  
*Grants & YAR Coordinator*

Susan Perry  
*Controller*

Jonah Ruh  
*Web & Communications Manager*

### BOARD OF TRUSTEES

Joe Grimaldi, Chair  
*Mullen*

Michael Prior, Vice Chair  
*Atlantic Tele-Network*

Allan Huntley, Treasurer  
*501 Partners*

Rosalin Acosta  
*TD Bank*

John Brooke  
*Brooke Private Equity Associates*

David Dearborn  
*Community Volunteer*

Anne Dodge  
*Community Volunteer*

Matthew Doring  
*Hinckley, Allen & Snyder*

Patricia Karl  
*Lawrence Family Development Charter School*

Patricia Maguire Meservey  
*Salem State University*

Juliet Nagle  
*Community Volunteer*

Jonathan Payson  
*Wellington Management Company (retired)*

William C. Rogers  
*Of Counsel, Choate Hall & Stewart*

Pauline Sheedy  
*US Trust Bank of America*

Richard Sumberg  
*The Financial Advisors*



Essex County  
Community Foundation