

GROWING in Essex County

Look across Essex County—one of the nation's oldest—and you'll see a County that's always grown great things. From rich possibilities for innovation to the marshlands and salty air that inspire creative expression, then and now, yesterday and tomorrow, Essex County gives and grows and gives some more.

On farms and reserves, we watch miracles grow each season, while friends grow food pantries for neighbors who don't have enough to eat. Children grow muscles and character at community centers and summer programs. Students grow their futures and retirees grow new opportunities through volunteering.

Keep looking and you'll see museums growing imaginations and nonprofits growing lettuce alongside leadership development. Here, wonder is cultivated, rivers protected and inspiration ignited. Philanthropy grows, too, in families, foundations and neighborhoods, inviting compassion and service to each corner.

In each of the 34 cities and towns that make up Essex County, opportunities to give where you live, build community and enjoy this remarkable place grow everyday.

What will YOU grow in Essex County?

Planted 16 years ago, the
Essex County Community Foundation
grew because a few friends believed
we can do more together than we
can do alone.

LETTER from the CEO



Dear Friends and Neighbors,

The kids in the neighborhood where I grew up used to play something we called "The Bigger and Better Game." We each started with a penny or a bottle cap or a cool rock and went door-to-door asking grownups

if they would give something bigger or better. By afternoon industrious kids brought back an old quilt or a wagon missing a wheel or a fish tank or a medal or an elbow-patched sportcoat that would shelter three of us. It was about growth, on several levels.

And here we are in Essex County having done just that for 400 years. Where once we gave hungry Boston settlers baskets of corn, our giving is now nearly \$1 billion annually. Our colonial barn-raisings have grown into 2500 charitable organizations—and 20,000 of us serve on their Boards.

Here givers provide education, build homes, preserve green spaces, welcome immigrants, nurture families, produce music, and save lives. Our common cause is to accomplish together something bigger and better than any of us can do individually: healthy, safe, caring, thriving communities.

The vine in this chart grows in very fertile soil here. Together we have grown giving.

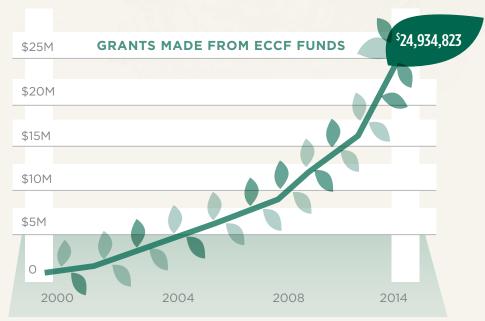
We are growing prosperity.

We will grow health. We will have grown joy. What will YOU grow with us?

Heartfelt thanks,

Dave Welbourn,

President and CEO



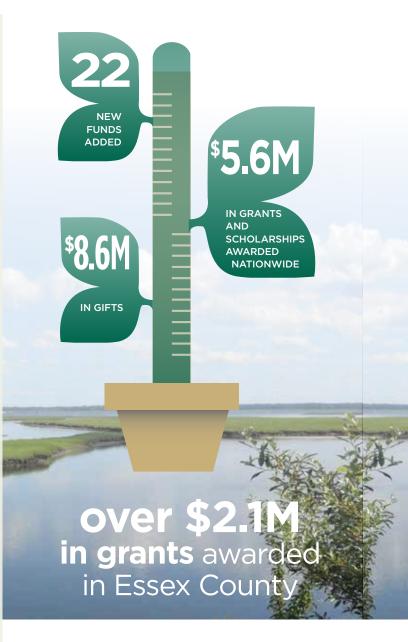
ECCF's 2014 highlights

ECCF by the numbers

FY 2014 GEOGRAPHICAL DISTRIBUTION



ECCF FY 2014 RESULTS



FY 2014 HIGHLIGHTS

CENTER FOR NONPROFIT EXCELLENCE 5TH YEAR

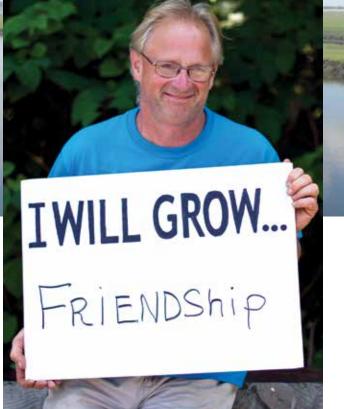
- 468 workshop attendees
- 219 nonprofit organizations helped
- 11 workshops presented

INSTITUTE FOR TRUSTEES 5TH CONFERENCE

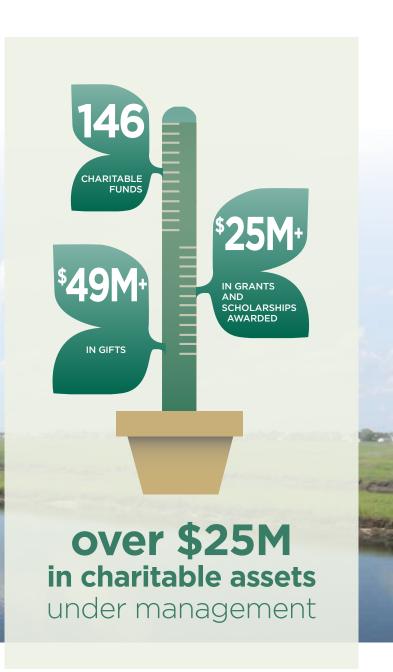
- 376 attendees
- 171 nonprofit organizations represented
- 22 workshops plus private consultations

YOUTH AT RISK 14TH CONFERENCE

- 771 attendees
- 226 nonprofit organizations represented
- 25 workshops presented



ECCF LIFETIME IMPACT





It's a Fact! George Peabody of Danvers was born a pauper, thrived in international trade, and became known as the father of modern philanthropy.

146 charitable funds and growing

NEW in 2014



602 grants awarded to 391 nonprofits across Essex County

With so much good news this past year, we've also planted new ways to tell the ECCF story: The Giving County Chronicles, our new blog (www.eccf.org/blog); Daily posts on Facebook-Essex County Nonprofit Community; Twitter; ECCF Channel on YouTube; Pinterest, and Flipboard.









It's a Fact! Talk about changes: Lobster, first culled off Cape Ann, only grew into a delicacy once it traveled south on the railroad. And Wenham ice was shipped to Queen Victoria's table throughout her reign.

GIVING report



From Jay Caporale, Executive Vice President and Director of Philanthropy

It's been a stellar year at ECCF. With **22 new donor advised funds** in fiscal year 2014, including general interest, family and scholarship funds, our **assets under management have increased to nearly \$26 million**, all while increasing ECCF's philanthropic impact across the region. That means a lot of good efforts can grow stronger.

With ECCF's **146 charitable funds**—**\$5.6 million** this year alone in grants and more than 100 scholarships granted yearly to deserving students—we're excited at the Foundation's trajectory. People want to give where they live and that's making a difference across the County. You'll see what I mean over the next several pages as a few of the new donor funds are highlighted!

22 new donor advised funds...and growing

"I am so grateful for this grant because it enables me to further my education at the high school that I love, a school that provides for me many opportunities to shine and to prove my potential in and out of the classroom. I thank each committee member and donor for this scholarship."

-VARSHA VADLAPATLA

PROFESSIONAL ADVISORS COMMITTEE:

Daniel Bakinowski Tax Attorney (retired)

Terry Beaton Beaton Management Co.

Thomas Burger

The Hamilton Group

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Bridget Murray

Law Office of Bridget Murray

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Pulsifer & Associates

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Derek Reed

Beauport Financial Services

William Ryan

Ryan Financial

Matthew Schroeder
The Hamilton Group

Richard Sumberg
The Financial Advisors

Susan Weeks

Vesey and Company PC

DONOR FUND highlights

Among ECCF's 22 new funds is the Farnsworth Fund, a donor advised fund which focuses on the environment. Its uniqueness is that it also comes with a requested fund manager. The Farnsworth Fund distributes five percent annually exclusively for environmental efforts.

Other new funds address a range of issues important to our donors: education, preserving green space, and the arts. They invest here because ECCF partners with them around their interests, relieving them of administrative work while re-investing fees to help others in Essex County. And that's good for everyone.



NEW 2014 FUNDS:

Giangrande Family Scholarship Fund

Brand Fund

Ocean River Institute Fund

Richard J. Collins Memorial
Scholarship Fund

Step Up for Colleen

Rockport Millbrook Meadow Fund

Peter Watson Memorial Scholarship

One Run for Boston Fund

R.J. Weggel Fund for the Friends of The Middlesex Fells Reservation

Centerville Improvement Society

Farnsworth Fund

Spark Academy Fun

Josh Quince Fund for Adolescent

Christian Angel Smile Fund

Colleen Ritzer Scholarship Fund

Friends of Swampscott Athletic Fields

Essex Art Center Founders Fund in Recognition of Leslie Costello &

JTS Memorial Fun

Santa's Workshop Fund

Ansara Fund for Essex County

1115 Fund

0219 Fund

ECCF hosts two specific funds established to honor Colleen Ritzer, the Danvers High School teacher who passed away in the fall of 2013.

The Colleen Ritzer Memorial Scholarship Fund and the Step Up For Colleen Fund have received gifts from all over the country, and a variety of creative community fundraisers have helped provide resources for college scholarships. This spring, the first scholarships were awarded to graduating seniors from Andover and Danvers High Schools who plan to pursue education as a major in college.

The awardees demonstrate academic excellence, a passion for teaching, and a great love of family.



It's a Fact! Ipswich has more First Period houses (1630-1735) than any other town in the United States 57 to be exact

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DONOR FUND highlights

One Run for Boston

On April 13, 2014, a thousand runners ran down Boylston Street towards the Boston Marathon Finish Line, marking the last leg of *One Run For Boston* – a 3,328 mile non-stop relay from Los Angeles to Boston that raised money for the victims of the Marathon bombings. They passed the baton to a group of bombing survivors who took it the final meters to Copley Square.

Organizers and friends of One Run For Boston returned to Copley Square a few months later to present a check for \$455,000 to Mayor Marty Walsh on behalf of the One Fund Boston. British runners Danny Bent, Kate Treleaven, and Jamie Hay created the ECCF Fund in January 2014 to provide an effective, community-oriented way to collect donations. Over 2,000 runners helped along the way.

"We had no idea if the relay would work, let alone take off in the extraordinary way that it did," said Bent. "But *One Run For Boston* became a symbol of hope, inspiring a grassroots movement that still unites the running community."

One Run For Boston shows what happens when people put their passions together to help. ECCF is proud to be the fiscal sponsor for these extraordinary runners wanting to give back.

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Tunfor

Photo by Chitose Suzuki/Boston Herald

"I believe in increasing the impact of my dollars and helping others do the same. When I contribute to ECCF, my dollars are stretching farther because my donor advised fund is supporting the incredible work of this Foundation, providing financial management training, planning opportunities, and meetings that foster collaborations."

KAREN ANSARA of The Ansara Fund of Essex County,
 ECCF Trustee, activist with the Haiti Fund,
 and philanthropist



It's a Fact! People's passions grow in Essex County: Marblehead—yachting capital of the world; Saugus—birthplace of the American iron and steel industry; Essex—home of the fried clam.

CELEBRATING giving



"Celebration of Giving" Breakfast

ECCF's inaugural breakfast to celebrate collaborative philanthropy in Essex County drew 280 friends and nonprofit leaders on Wednesday, May 7 in Peabody, MA. In attendance were representatives from 24 nonprofits in 15 towns who received grants from the Fund for Nonprofit Excellence that strengthen board leadership and provide scholarships to attend the Institute for Trustees. (See a list of recipients at http://eccf.org/fne-2014)

Essex Art Center received the inaugural Nonprofit Excellence Award,

honoring a nonprofit in Essex County that has achieved a standard of excellence in service to the community. Essex Art Center was founded in 1993 with a mission to make art accessible to the Greater Lawrence community through classroom exploration and gallery exhibitions. Now over 5,000 participants engage each year in art programming, exhibitions and events at EAC!

CELEBRATION OF GIVING COMMITTEE

Karen Keating Ansara, ECCF

Thomas M. Burger,
The Hamilton Group

Mollie Byrnes, ECCF

Michael Gallagher, Enterprise Bank

Susan J. Gray, ECCF

David J. LaFlamme, North Shore Bank

David S. McKechnie, CLU, Beauport Financial Services

Jonathan Payson, ECCF

Kevin M. Tierney, Sr., ECCF



CELEBRATING giving

"Celebration of Giving" Breakfast

Essex County grows collaborative giving and philanthropy, often seen in the inspiring stories of women and men whose service makes our region a better place to live. ECCF honored two such individuals at our inaugural breakfast, May 7.

Paula and Binkley Shorts of Wenham Receive the Inaugural George Peabody Award

In the spirit of George Peabody, father of philanthropy, this award recognizes the generosity, vision and support of regional leaders.

Essex County is a better place because of the volunteer efforts of Paula and Binkley Shorts. Whether serving on nonprofit boards that advance the arts, education, health, and environmental issues, or helping promote philanthropy across the County, Paula and Binkley model for us a deep commitment to caring for others. In fact, in the early years of ECCF, it was the Shorts whose leadership and service proved instrumental to the Community Foundation's rapid growth.

Paula was an ECCF Trustee and a founding member of The Women's Fund of Essex County, where she also served as president. Binkley played a vital role on the ECCF Investment Committee as well as on the board of the North Shore United Way for over twelve years. While the Shorts remain active in organizations with diverse missions, the breadth of their work elicits both lasting appreciation and future impact. Their family carries on their tradition in giving where they live.

"I want to thank my parents for the kind and generous moments they so beautifully sprinkled throughout our lives. Their message has always been to get involved and feel the magic of giving. They'd always say, don't give for recognition but do it to make a difference for someone somewhere. My brother, sister and I want to thank you for inspiring us that you can make a difference at any age."

-ELIZABETH (SHORTS) HARRIGAN, who surprised her parents by introducing them at the Celebration of Giving inaugural breakfast





Binkley and Paula Shorts receive the George Peabody Award and celebrate with their children and grandchildren.



It's a Fact! The first tulips in the U.S. were grown in Lynn and Salem in the mid-1840s.

GIVE where you live

Donor Advised Funds provide flexible ways to enhance giving while reflecting the values and concerns of each individual or family donor. ECCF is accredited by the Council on Foundations for full compliance with its rigorous standards for transparent, efficient and ethical organizational and financial practices for community foundations. In its external audit for 2014, ECCF received unqualified approval for all accounts, controls and practices. ECCF has no debt or legal actions.

Like the other 900 community foundations around the country, ECCF's mission is to help solve issues in our local communities while making charitable giving for individuals, families, and corporations more effective and satisfying. We share your passion to make a difference.

The Benefits of a Donor Advised Fund

You receive **personalized attention** with services tailored to meet your charitable and financial goals.

You gain access to ECCF's wealth of knowledge about local organizations, issues and causes in the 34 cities and towns of Essex County.

You are relieved from all administrative duties such as accounting and reporting.

ECCF provides professional financial stewardship and investment management for your fund's assets.

Your gifts are magnified as fund fees support our Center for Nonprofit Excellence.

Your giving is private and anonymous if you wish.

Your investment has a lasting and meaningful impact.



FOR MORE INFORMATION, CONTACT JAY CAPORALE:

Jay@eccf.org. Or visit our website: www.eccf.org

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I WILL GROW... BRAIN BUILDING During 2014, ECCF awarded over \$5.6 million in grants and scholarships throughout Essex County and beyond.

A record 781 grants from donor advised funds were given to organizations from Haverhill to Gloucester to Warsaw, Poland. ECCF scholarships helped 131 students attend tuition paying high schools, colleges and graduate schools during the 2014-15 school year. ECCF donors are generous and passionate with their gifts and creative in their grant making. On the next page are two remarkable examples.

GRANTS

grow better schools and organizations

To support and promote academic achievement in English, math and science in public schools, ECCF's Hardscrabble Education Fund awarded over \$500,000 in grants to schools in Beverly, Lynn, Marblehead, Nahant, Salem, and Swampscott. This year's winning grant applications included projects for new technology such as SMART boards, iPads for classrooms, lab equipment and books for libraries and classes in all grade levels.

The Hardscrabble Education Fund began in 2002 with a gift from an anonymous donor who hoped to make a difference in public school education on the North Shore. Since then, over \$2 million in teacher-initiated grants have been awarded.



GROWING GREATER SUMMER OPPORTUNITIES IN GREATER LAWRENCE

The Betty Beland Greater Lawrence Summer Fund supports summer recreation, learning and hope for at-risk youth in and around Lawrence. This year, 49 agencies won nearly \$280,000 in grants. And almost 15,000 children had a whole lot of summer fun.

The GSLF is named for its founder, the former administrator of The Stevens Foundations. Since 2001, the Fund has contributed more than \$3.2 million to summer programs in the Greater Lawrence area with programs that include boating, meals, writing, science adventures, and test preparation.



It's a Fact! ECCF grows legacies in family funds, future learning in scholarship funds, and ideas in innovative donor advised funds.

GROWING NEWS from the Center for Nonprofit Excellence

468 workshop attendees 219 representing nonprofits

Whether through professional workshops or the Institute for Trustees, individual consulting or free access to the EBSCO Publishing Grants Resource Center at ECCF's office, the Center's impact this year has grown wider and the reach deeper in making Essex County better for all of us.

Throughout the year, ECCF offered local leaders and board members 11 new educational opportunities through our annual workshop series. For instance, webinars and live seminars helped boards create their own strategic plans, and nonprofit staffs developed new skills on social media and data. ECCF provides nonprofits excellent training, tools and support for building productivity and capacity.



Julie Bishop,
Vice President of
Grants and Services



Carol Lavoie Schuster, Assistant Manager of Grants and Services



Institute for Trustees (IFT)

On March 22 at the Pingree School, 376 board members and executive directors from nonprofits throughout Essex County gathered for the 2014 ECCF premiere leadership conference.

Keynote speaker Billy Starr, who developed the Pan-Massachusetts Challenge into the nation's most successful single fundraising event, talked about how to elevate a cause and build a movement.

The 22 IFT workshops were dynamic, expert, and influential as usual, covering topics such as leadership, fundraising, planning, financial management and governance. Sessions were offered for first time board members as well as Master Level workshops for seasoned Trustees.

New this year was a curated electronic ECCF Flipboard magazine highlighting specific resources from Institute speakers and showcasing articles from prominent leaders, including Starr.

(The IFT Magazine is available at https://flipboard.com/section/institute-for-trustees-bgG2Wm)



It's a Fact! Leonard Bernstein fell in love with music while growing up in Lawrence and became a world famous conductor and composer of such scores as *West Side Story.*

WATCH THE 2014 IFT VIDEO "CATCH THE SPIRIT!" www.eccf.org/ ift2014-video





"I love that ECCF somehow finds individuals who have been in the nonprofit game and can share real experiences that are inspiring. The lessons apply to tiny or large organizations."

- 2014 IFT Attendee

Caring for New England's Youth at Risk (YAR)

The Youth At Risk Conference addressed the many issues facing today's young people—and those who help them.

The annual conference at Endicott College drew 771 individuals working with, and caring for, youth in multiple settings—family, community, school, religious, healthcare, recreational and legal. Each year, ECCF asks a committee of local experts to design the curriculum. They created 25 compelling workshops and called in two dynamic keynote speakers: Dr. Nancy Rappaport, associate professor of psychiatry at Harvard Medical School, and Dr. Jefferson Prince, director of child psychiatry for MassGeneral for Children at North Shore Medical Center.

YAR taps Essex County's wealth of expertise on youth at risk. Each year, it is a much anticipated, one-of-a-kind event for those doing the crucial work of helping our most vulnerable young people.



"It's critical that we address the tough issues confronting our young people everyday. YAR exists for that reason. Between the collaboration of youth service providers, workshops and resources, our goal is to equip those doing the difficult yet rewarding work of caring for the next generation."

Kathy Moriconi,
 Grants and YAR Coordinator



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STUDYING the future

Looking Forward

By identifying the attributes and priorities of Millennials (ages 22-35) and Gen X-ers (ages 35-47), the **2014 Next Gen Study**—a donor-funded research project—provides a window into crucial trends in and beyond Essex County.

Led by ECCF's Jay Caporale and Carol Lavoie Schuster, the **2014 Next Gen Study** team included two national experts, two researchers and a committee of ECCF supporters.

The team's methodology included demographic research of Essex County; 2008-2012 American Community Survey five-year estimates as well as research and interviews of 20 different regional and national programs. Two focus groups were conducted, one of nonprofit board leaders, and another of local donors and philanthropists.

As a result, we gained a clearer understanding of Millennials and Gen X-ers in Essex County, where they live, what they think, and how we can better engage them in shaping our communities for generations to come.







GROWING new leadership



Essex County Millennials & Gen X-ers:

WHAT DID WE DISCOVER?

- Younger Millennials live largely in urban areas.
- Older Millennials & Younger
 Gen X-ers live across Essex County.
- They think differently about service and giving than previous generations.
- They are more interested in systemic change.

WHAT'S NEXT?

The study revealed patterns of giving and activism that will guide us in developing programs that elevate the community. Because many Gen X-ers and Millennials want to volunteer locally, serve on boards and create intergenerational dialogue, we're adding a Next Gen Track to the 2015 Institute for Trustees and developing a youth philanthropy initiative.



Demonstrate a high level of interest in philanthropy and service through:

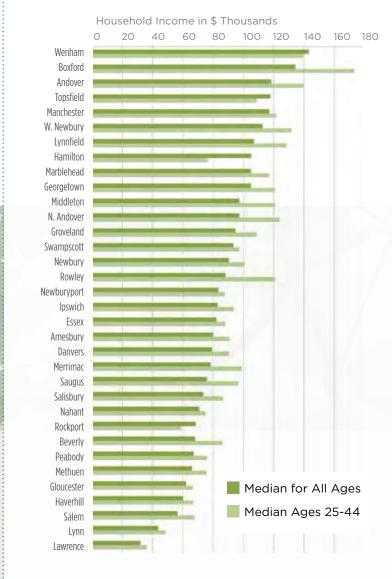
- Volunteering
- Nonprofit Leadership
- Board Membership
- Youth Development
- Educational Partnerships



"The younger generation needs to know there are places on boards for them. They will step up and contribute in huge ways if given the opportunity!"

- "JUAN," 24, board member in2014 Next Gen Study focus group

Have higher household income than the average population in 30 of 34 Essex County towns and cities:



ECCF Committees

INVESTMENT COMMITTEE:

Brinck Lowery

President, Foster Dykema Cabot

Myranda O'Bara

Managing Partner, Oakmont Partners

Jonathan Payson

Partner, SVP, Wellington Management (retired) **ECCF Trustee**

Richard Sumberg, Chair

CEO. The Financial Advisors **ECCF Trustee**

Kevin Tierney, Sr.

President & CEO, SaugusBank **ECCF Trustee**

Joseph Trainor

Managing Partner, Boston Hill Advisors

John Walsh

Managing Director, Brown Brothers Harriman



GRANTS MANAGEMENT

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Maria Mesinger | N. Andover

Sandy Newman | Marblehead

Martha Rawlins | S. Hamilton

Sherry Rogers | Ipswich

Jody Smith | Rockport

Susan Turnbull | Manchester

Kristin Zampell Noon | S. Boston

COMMITTEE:

Don Hodgman | Wenham

Matt Doring, Chair | Rowley

Susan Gray | Rockport

The ECCF Board of Trustees

governs, sets policies and assures the fiduciary compliance and sustainability of the Foundation. The Board is comprised of community leaders from across the County who are passionate about enhancing the region's philanthropic resources and well-being of the nonprofits and the people they serve.



ECCF Board of Trustees

It's a Fact! The first public demonstration of the telephone by Alexander Graham Bell was held at the Lyceum in Salem.

KAREN ANSARA | The Haiti Fund

MOLLIE BYRNES | Community Volunteer

STEVEN COHEN | The Negotiation Skills Company

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KEVIN M. TIERNEY, SR. | Saugusbank

DAVID M. WELBOURN | President, ex officio



It's a Fact! The bell at the Congregational Church in Groveland was crafted by Paul Revere and is still

ECCF Staff



ECCF STAFF:

DAVE WELBOURN

President and CEO

JULIE BISHOP

Vice President of Grants and Services

JAY CAPORALE

Executive Vice President and Director of Philanthropy

JOAN HENKELS

Program Assistant

JO KADLECEK

Director of Communication

PAT KELLEHER

Philanthropic Coordinator

CAROL LAVOIE SCHUSTER

Assistant Manager of Grants and Services

KATHY MORICONI

Grants and YAR Coordinator

SUSAN PERRY Controller



"What a great story ECCF has!
I'm inspired by the generosity
of so many people in so many
ways, from their service and
leadership to their philanthropy
and vision. No wonder the word
is spreading: Essex County is
indeed the Giving County."

— Jo Kadlecek, Director

of Communication



"This year, our Community
Foundation has grown at a good
rate, our financials are strong
and we're poised to take on even
more growth in funds. I always
tell people that ECCF is a win/win
solution to addressing the needs
across the County."

— Susan Perry, Controller



"A highlight of the year for me was the Celebration of Giving breakfast. It exceeded our expectations and we were humbled that so many people came to show their support of our first gathering, which we hope will grow into an event people look forward to each year." — Joan Henkels, Program Assistant



"Thank you to all our generous donors for your ongoing support as we continue to fulfill the Foundation's mission. FY14 was a strong philanthropic year and I look forward to a successful FY15. Great things happen when we all work together." — Pat Kelleher, Philanthropic Coordinator

What will YOU grow in Essex County?

Contact us today:
Essex County
Community Foundation
175 Andover Street
Danvers MA 01923
978.777.8876
www.eccf.org





"I can't begin to express my gratitude for your kind generosity.

Foundations like this are priceless." —Audrey Fernandez

Essex County Community Foundation promotes philanthropy and strengthens nonprofits serving the people of Essex County.



Essex County Community Foundation | 175 Andover Street, Danvers MA 01923 | 978.777.8876 www.eccf.org