# Strengthening 34 cities & towns as

Amesbury Andover Beverly Boxford Danvers Essex Georgetown Gloucester Groveland Hamilton Haverhill lpswich Lawrence L y n n Lynnfield Manchesterby-the-Sea Marblehead Merrimac Methuen Middleton Nahant Newbury Newburyport North Andover Peabody Rockport Rowley alem S Salisbury Saugus Swampscott Topsfield Wenham West Newbury

ESSEX COUNTY COMMUNITY FOUNDATION E C ANNUAL REPORT 2018

### Our Mission and Vision

Our mission is to inspire philanthropy that strengthens the communities of Essex County.

We do this by managing charitable assets, strengthening and supporting nonprofits and engaging in strategic community leadership.

Our vision is to make Essex County the best place to live, work and raise a family by supporting 34 thriving cities and towns that have:

- Successful schools
- Safe, clean, green and vibrant neighborhoods
- Economic and job opportunities
- Arts, culture and entertainment
- Healthy people

#### 2018 ECCF BOARD OF TRUSTEES

Steven P. Cohen John Colucci Matt Doring Theresa Ellis Bob Fanning Tracy Filosa Bob Goldman Bob Gore Susan Gray Moira McNamara James Joe Knowles Ben Langille Liz Moulton Pat Maguire Meservey Christine Ortiz Jon Payson Derek Reed Jim Rullo Dick Sumberg Kevin Tierney Jean Verbridge Rich Yagjian

\*Trustees serving during 2018

## A Message from ECCF

#### 34 As One. We Are Essex County.

If you live in Lynn, should you care about what's happening in Newburyport? Should residents of Salem feel connected to those who live in Lawrence? Do people in Andover really need to pay attention to what's going on in Salisbury?

The answer to all these questions is a resounding 'yes.'

#### But, why?

You might live in Danvers, own a business in Amesbury, shop in Lynnfield and dine in Gloucester. Every day, life likely takes you outside the borders of your hometown. You make connections and develop relationships and begin to see the symbiosis among people, neighborhoods and even nearby cities and towns.

We can all be proud of the fact that Essex County is made up of 34 distinct cities and towns, each with a unique identity that contributes to the diverse fabric of the greater community. But we also don't live in silos, where tragedies and triumphs are confined within our individual borders. As the recent Columbia Gas tragedy in Lawrence, Andover and North Andover proved, we are stronger when we stand together.

We are all of us connected; not just by crisis, but by our proximity, by life's everyday challenges and victories and by the hopes and dreams we have for ourselves and for our families. Within our 500 square miles, there is the powerful potential to learn from each other, face obstacles together and reap the rewards of shared success. It's already happening. At ECCF, we believe that we can accomplish so much more together than what we can do alone. "Thirty-four as one" does not mean we must forego what makes each of our cities and towns unique. But it does mean that if we learn from our differences and recognize our similarities, we can use one voice to accomplish great things for Essex County.

We have placed a lot of focus this past year on collaboration and collective action, from the very core elements of our Community Leadership Initiatives right down to the daily operations of the Foundation. We have engaged a record number of friends and supporters in our work; strengthened connections between donors and local nonprofits; and convened leaders from across Essex County to discuss a regional approach to elevating arts and culture, improving regional transportation and creating economic opportunity for all.

"Thirty-four as one" is more than just a theme for our annual report; it's a new way of thinking about how – together – we can improve the quality of life in Essex County, and secure a brighter future for the generations to come.



JON PAYSON Chair of the Board



BETH FRANCIS President & CEO

## ECCF EMERGES AS A GALVANIZING FORCE FOR ESSEX COUNTY THROUGH COMMUNITY LEADERSHIP



In 2018, ECCF was given the extraordinary opportunity to partner with the Barr Foundation in a groundbreaking initiative to strengthen arts and creativity across Massachusetts. ECCF was one of five community foundations chosen to participate in Barr's Creative Commonwealth Initiative.

#### **CREATIVE COUNTY INITIATIVE STEERING COMMITTEE**

KAREN RISTUBEN Program Director, Creative County Initiative

**ELENA BACHRACH** Executive Director, Newburyport Art Assn.

**TONY BEADLE** Executive Director, Rockport Music

**DIANNE BRAND** Certified Financial Planner, The Financial Advisors, LLC

ANA COLMENERO Board Member, Peabody Essex Museum

**JUDITH FARZAN** Board Chair, Essex Art Center

**DEBORAH GREEL** Public Art Director, City of Salem (retired)

LILLIAN HSU Public Art Director, City of Cambridge

**STEVE IMMERMAN** President, Montserrat College of Art (retired) SARAH JACKSON Director, Lynn Cultural District

KATIE KING Principal, K2 Consulting

NOAH KORETZ Deputy Director, Transformative Development, MassDevelopment

**KATE LUCHINI** Public Art Director, City of Salem

PEDRO MIGUEL SOTO Associate Director, Beyond Walls

JEAN NICHOLS Biotechnology Executive (retired)

J. CASEY SOWARD Executive Director, The Cabot

ROSARIO UBIERA-MINAYA Director, Cojuelos' Productions

# Art has the power to move, educate and connect us.

At its heart, Essex County Community Foundation is a leader, bringing together people and organizations from all corners of Essex County to strategize on the best ways to improve the quality of life in our region. Because we serve the whole County – all 34 cities and towns – ECCF has the knowledge and the capacity to foster meaningful connections between philanthropists, nonprofit organizations and state and local community leaders, and spearhead initiatives that inspire collective action.

We believe that by working together as one, we can acheive our goal: that Essex County has a strong ecosystem for arts, culture, design and creative enterprise that is both equitable and accessible.

# **CREATIVE COUNTY INITIATIVE**

On April 13, 2018 at our inaugural Arts & Culture Summit, ECCF publicly unveiled its Creative County Initiaitve, the first ever comprehensive countywide effort to elevate arts and culture in the region.

More than 400 artists, art and cultural nonprofit representatives and community leaders gathered at The Cabot, Beverly's historic and beloved arts and performance center, for a high-energy day of education, networking and live performances.



Local and international experts spoke on the power that creative placemaking, public art and cultural planning has to transform communities, promote inclusion and celebrate diversity. And ECCF unveiled the following key components of our Creative County Initiative.

Our Creative County grants\* program for

public art and creative placemaking is a \$300,000 investment in 11 collaborative arts and culture projects across Essex County that encourages broad community support for the arts and cultural assets that make our communities vibrant and diverse.

The creation of an online arts hub – **EssexCountyCreates.org** – that connects the arts and culture community directly to the public with a comprehensive regional online arts and culture calendar. The site also includes valuable resources for the arts and culture community. More than 150 artists, organizations and venues have already joined the site and over 1,000 events are posted.

#### Resources for cultural planning are

underway with the Metropolitan Area Planning Council and the Merrimack Valley Planning Commission to bring cultural planning to every Essex County community. CCI's Cultural Planning programs will provide a road map for the future of arts and culture in Essex County. We will deliver a regionalized approach to creative placemaking, public art, arts and culture policy, regional cultural exchange, and greater investment in arts and culture by the county's philanthropic leaders.

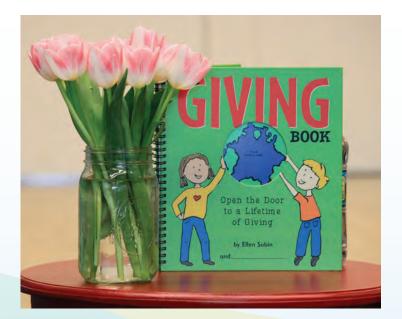
ECCF's Creative County Initiative – which places a major focus on diversity, equity and inclusion – represents a \$750,000 total investment in strengthening the arts and culture ecosystem of Essex County, making our cities and towns safer, healthier, and more vibrant and connected than ever before.

\*Grants awarded in FY19.

# ECCF'S NEXTGEN PHILANTHROPY INITIATIVE

Millennials and Gen X'ers will wield more philanthropic power than any generation before and ECCF wants to ensure they are prepared to achieve the impact they want to make in their communities.

Essex County's next generation of philanthropists learn and connect at fun and engaging events.



By connecting this next generation of philanthropists with their peers at fun get-togethers, they gain a greater understanding of the challenges facing Essex County and how their giving can have an impact. By hosting educational events geared towards the interests of NextGen philanthropists – many of whom have growing families and burgeoning careers – ECCF is able to open the door to meaningful discussions about values and purpose, and help create a path for the philanthropic collaborations of the future. And we do this all with the busy, active lifestyle of young families in mind.





### **FY18 NEXTGEN EVENTS**

Oct. 21, 2017 | Second Annual NextGen Paella Party, hosted by NextGen Committee member, Katy Langhorst. Guests enjoyed conversation and an amazing paella dinner. The highlight of the evening was an appreciative inquiry exercise during which guests discussed the root causes of two of Essex County's most pressing social issues: the opioid crisis and income inequality.

April 9, 2018 | Engaging Kids in Charity

In partnership with Brookwood School, ECCF hosted Ellen Sabin, author of "The Giving Book," who led an interactive session that engaged parents and teachers in ways we can inspire the next generation to carry on a tradition of giving that will echo throughout their communities.

May 19, 2018 | NextGen Spring Cocktail Party,

hosted by ECCF trustee, Ben Langille, and NextGen Committee Member, Michelle Langille. In addition to networking and enjoying a scrumptious array of antipasto, guests participated in an exercise designed to better inform ECCF's evaluation, selection and prioritization of possible collective actions for our Impact Essex County alpha project.







# **IMPACT ESSEX COUNTY**

# Taking on Essex County's Greatest Social Challenges

Imagine a time when all people who live, work and raise families here in Essex County are happy, healthy and thriving. This is the long-term goal of Impact Essex County, ECCF's community leadership project aimed at improving the quality of life in the 34 cities and towns of Essex County.

In 2018, ECCF made significant headway towards making this vision a reality. We started the year by taking a deep dive into eight of the region's most pressing social issues, as identified in 2017 through a thorough analysis of published data collected at ImpactEssexCounty.org.

# TIMELINE

### 2016:

JANUARY: A key leaders forum to advise on ECCF's Indicator project was initiated.

**APRIL-OCTOBER:** Focus Groups helped identify 100+ indicators to measure.

**OCTOBER:** ECCF launched a new data website at a 250-person event, led by Salem Mayor, Kimberley Driscoll.

**DECEMBER:** ECCF media campaign promoted data website for use by the community.

## 2017:

JANUARY: ECCF Advisory Council analyzed 100 indicators, identified challenges facing our county, and prioritized the top eight greatest challenges.

**APRIL-NOVEMBER:** Meetings conducted to gain greater knowledge about each challenge area, narrowing to three for further research.

**DECEMBER**: ECCF Trustees (with help from Advisory Council) selected the first Impact Essex County systems change project: Empowering Economic Opportunity.

16<sup>%</sup> INCREASE IN CHILDREN LIVING IN POVERTY FROM 2010-2014 126<sup>%</sup> INCREASE IN RATE OF HOMELESSNESS SINCE 2007 With the help of ECCF's dedicated Impact Essex County Advisory Council and panels of community, state and nonprofit representatives - those closest to Essex County's most critical needs - in early 2018, those eight challenges were narrowed to three. Then, after careful consideration, ECCF trustees, working alongside the IEC Advisory Council, selected the first Impact Essex County initiative: Empowering Economic Opportunity. We know that by creating better access to economic opportunities, residents of Essex County will feel empowered to lead more financially secure, fulfilling and productive lives.

But how do we do this?

By spring 2018, ECCF's Collective Impact model of systems change had taken shape. The idea is that by working together, not only can we ease the symptoms of the social challenges we face, but we can also address their underlying causes. By strengthening the links between nonprofits, community leaders and funders – i.e. changing the system – we can create a more engaged, collaborative approach to philanthropy that will result in greater impacts on the obstacles that impede a high quality of life for all.

By the end of the fiscal year, Impact Essex County's first three-year project grew legs, and with the selection of four key programs to carry out our goals, the path to a higher quality of life for those who live, work and raise families in Essex County was paved.

### 2018:

**MARCH:** ECCF shaped its Collective Impact model of systems change.

**JUNE:** IEC's first three-year project took shape and four key programs were selected.

**SEPTEMBER:** ECCF developed business and fundraising strategy for Impact Essex County's long-term impact.

### 2019:

JANUARY – FEBRUARY: ECCF will announce its first threeyear project, Empowering Economic Opportunity, and its partners.

#### THE WORK BEGINS.





#### IMPACT ESSEX COUNTY ADVISORY COUNCIL

TONY BEADLE Executive Director, Rockport Music

EDWARD BECKER President, Essex County Greenbelt (retired)

LORI ABRAMS BERRY Executive Director, Lynn Community Health Center

MAGNOLIA CONTRERAS Director of Community Benefits, Dana Farber Cancer Institute

FRANK G. COUSINS, JR. President & CEO, Greater Newburyport Chamber of Commerce & Industry

ANDREW DEFRANZA Executive Director, Harborlight Community Partners

**LEE DELLICKER** Owner, President & CEO, Windover Construction

MAYOR KIM DRISCOLL City of Salem

BECKY HALLOWELL The Women's Fund of Essex County

**RICK JAKIOUS** District Director, Office of Congressman Seth Moulton

**PAUL LANZIKOS** Executive Director, North Shore Elder Services

ANA LUNA Executive Director, ACT Lawrence

KARA MCLAUGHLIN Executive Director, House of the Seven Gables

PATRICIA MESERVEY President, Salem State University (retired)

**JOSH MINER** Executive Director, Stevens Foundation

DAVID OLSON Editor, Gloucester Times and Salem News

**JEFF RILEY** Superintendent, Lawrence Public Schools

JIM RULLO Senior Vice President, Wellington Management Company (retired)

CARLA SACCONE President & CEO, Children's Friend and Family Services

MARY SARRIS Executive Director, Northshore Workforce Investment Board

**BRIDGET SHAHEEN** Executive Director, Lazarus House

**KEVIN TIERNEY** President, North Shore Bank

**SUE TODD** President & CEO, Pathways for Children



# Bringing together philanthropists that care about Essex County

Much of the strength of Essex County Community Foundation is derived from the people and organizations that engage with us in our work. When a challenge requires collective action, so many answer ECCF's call. Our collaborative giving can help our communities overcome the challenges we face today and tackle the obstacles our region will confront in the future.



# **ECCF FUNDER'S SUMMIT**





More than 40 people gathered at Peirce Farm in Topsfield on May 16 for the 2018 Essex County Funders Summit. Convened by Essex County Community Foundation and the **Peter and Elizabeth C. Tower Foundation**, the Summit gathered philanthropists interested in learning more about the challenges facing Essex County.

The Summit was a chance for area funders to discuss data from ECCF's Impact Essex County indicators study - and data from area nonprofits - in order to learn more about how philanthropists can work together to help address our most pressing issues.

The Essex County Funders Summit provides a forum for philanthropists from across the region to engage in open discussion, networking and resource sharing. Our private foundation friends had the chance to inform each other on their giving strategies. And ECCF's individual fundholders shared with each other their philanthropic interests and causes they support.

This unique convening inspired collaborative giving and fostered relationships that will strengthen philanthropy in our region. Planning for a Spring 2019 Funder's Summit is underway.

# Inspiring others by focusing on

Inspiration can often be found in the positive actions of others. ECCF aims to inspire philanthropy by learning about and honoring the people and organizations doing good work in our communities – and beyond. When we hear their stories, we are inspired ourselves to do more. And by celebrating their work, we are acknowledging the tremendous impact they have on the world.



## ECCF'S 5TH ANNUAL CELEBRATION OF GIVING

On May 3, 2018, a record 500+ people joined Essex County Community Foundation at the DoubleTree in Danvers for our 5th annual Celebration of Giving breakfast, where we honored the people and nonprofit organizations using the power of collaboration to improve the quality of life in Essex County.

Our 2018 honorees – David McKechnie of Beauport Financial and The Women's Fund of Essex County – are true examples of people and organizations "Doing Together What We Cannot Do Alone."

"At Beauport Financial, we are having conversations with our clients not only on return on investment, but also return on their lives," said McKechnie, who received the 2018 Professional Advisor Award. McKechnie has a long list of philanthropic credits to his name, including his role as chair of ECCF's Professional Advisors Committee, lonatime involvement with the YMCA of the North Shore and his firm's Richard D. Wilson Community Response Gift Fund, managed by ECCF.

The Women's Fund of Essex County – an ECCF field of interest fund – was awarded the 2018 George Peabody Award for its impact on the health and wellbeing, economic self-sufficiency and security, and leadership and empowerment of women and girls. Since its inception in 2003, The Women's Fund, an all-volunteer organization, had awarded nearly \$2 million to 100 Essex County nonprofit programs.

"We work hard and we do it because we know it matters," said Lynn Bryant, The Women's Fund 2018 president. "We believe in the power of our intentions."

# philanthropic impact





Guests at the breakfast were also inspired by five Essex County nonprofit partnerships making an impact by working together. These five collaborations were each recipients of a grant from ECCF's Fund for Excellence in Essex County.

- The Beverly Summer Literacy Program
- Impact Lynn
- Life Sciences Consortium of the North Shore
- MakeIT Haverhill
- The Parker-Ipswich-Essex Rivers Restoration
   Partnership

## A CONCERT AND CONVERSATION WITH PETER BUFFETT



Essex County Community Foundation's donor education events give us a chance to help philanthropists explore the deeper meaning behind their giving. On Thursday, Feb. 8, nearly 200 people joined ECCF, in partnership with Shore Country Day School and the Boston Foundation, for A Concert & Conversation with Peter Buffett, the Emmy Award-winning son of billionaire investor Warren Buffett. Mr. Buffett's multi-media presentation took attendees on an interactive, musical journey on finding meaning and purpose in life. Mr. Buffett, author of New York Times Bestselling book, "Life is What You Make It," discussed how important it is for each person to define his or her own path, regardless of wealth or background. He further shared that one's values - and what we are able to give back to society - is what shapes and defines us as individuals.

"Life is What You Make It"

# **GREAT GRANTS**

At Essex County Community Foundation, we engage in thoughtful grantmaking that ensures our funds are having the biggest possible impact in our communities. Through a strategic competitive grants process and the mindful philanthropy of our donor advised fundholders, ECCF is working to improve the lives of Essex County residents every day.

### HERE ARE JUST A FEW EXAMPLES FROM 2018...

#### **ARTS & CULTURE 58 Grants Awarded** (\$1,106,075)

#### Acting Out! Theater Company,

Inc., for Greater Lawrence students to attend the Shine, Summer Sizzle and Center Stage theater programs, summer acting workshops designed to teach youth actors ages 4-18 the major components of theater arts. Greater Lawrence Summer Fund

#### RAW Art Works, for Women Art

**Muralists,** a program for high school-aged girls during which weekly sessions with an art therapist and community partners help them create public murals. sculptures and other works of art throughout the Lynn community. Women's Fund of Essex County

#### **EDUCATION & YOUTH** DEVELOPMENT **484 Grants Awarded** (\$2,552,672)

#### Harvard University Department

of Psychology, to support research under the direction of Dr. Matthew K. Nock into the understanding and prevention of suicidal behavior in youth and adults.

Chet and Will Griswold Suicide Prevention Fund

#### Bellesini Academy, for the Alumni Support Program, a

program that provides support services to Bellesini alumni throughout high school and college in order to ensure that all alumni complete high school and go on to earn a four-year college degree.

#### Women's Fund of Essex County

Groundwork Lawrence for the Summer 2018 Green Team, a year-round program that offers part-time, paid positions for 50 high school-aged students that lead local environmental and healthy community initiatives, grow food and conduct research. All this prepares Lawrence's youth for community leadership and invests in their capacity to improve the City's physical environment.

Greater Lawrence Summer Fund

#### **ENVIRONMENT 58** Grants Awarded (\$399,338)

#### **Conservation Law Foundation**,

an organization that uses the law, science and the market to advocate for solutions that preserve and protect New England's natural resources, build healthy communities and sustain a vibrant economy.

Mount Blue Fund

#### Change is Simple, a STEM

program designed for elementary and middle school classrooms that inspires children to achieve academic success and become mindful participants in creating a healthier and more sustainable future.

The Tosi Family Fund

#### FOOD SECURITY & HOUSING **10 Grants Awarded** (\$42,000)

#### Harborlight Community Partners,

to collaborate with communities to cultivate just, equitable and sustainable housing opportunities vital to the health and strength of the individuals and communities of the North Shore of Massachusetts.

#### Ansara Fund for Essex County

Merrimack Valley Habitat for Humanity, to support its mission of building affordable homes for economically disadvantaged people in the 22 Essex County communities the organization serves.

Sumberg Family Fund







#### HEALTH & WELL-BEING 71 Grants Awarded (\$468,267)

**Needymeds Inc.,** for the Community Representative Program, which helps people age 60 and over with the challenge of rising healthcare costs – medications, in particular – by providing direct care support in Gloucester, Rockport and Beverly.

North Shore Community Health Network

Northeast Hospital Corporation, for Connecting Young Moms, an education and support group at Beverly Hospital for teen and young mothers and their children. Women's Fund of Essex County

#### HUMAN & SOCIAL SERVICES 176 Grants Awarded (\$2,619,740)

**Beverly Bootstraps Community Services, Inc.**, for their Senior Mobile Market of Beverly, a free farmers market that promotes better health and nutrition by providing



seniors over the age of 60 with fresh fruits and vegetables. North Shore Community Health Network

Amirah, Inc., for their Survivor Mentoring Program. In a safe home for victims of sexual trafficking, Amirah offers whole person care to help survivors recover from physical and emotional trauma.

Richard D. Wilson Community Response Gift Fund

#### PHILANTHROPY & COMMUNITY LEADERSHIP 28 Grants Awarded (\$201,795)

Essex County Community Foundation, for the Creative County Initiative, a community leadership project that is increasing the visibility and impact of the transformative power of arts and culture in Essex County.

The Brand Fund

#### Essex County Community

**Foundation,** to award scholarships to leaders of small nonprofit organizations who otherwise would not be able to attend ECCF's Institute for Trustees, the region's premier educational conference for nonprofit board leaders.

The Institute for Trustees Fund

#### **OTHER GRANTS**

#### 62 Grants Awarded (\$137,762)

Animal Aid Religious International/Foreign Affairs Civic Engagement Public Safety

Human & Social Services	35%
Education & Youth Development	34%
Arts & Culture	15%
Health & Well Being	<b>6</b> %
Environment	5%
Philanthropy & Community Leadership	3%
Other	2%
Food Security & Housing	<1%

IN FY18 947 grants totaling **\$7.5 million** were awarded

## 9TH ANNUAL INSTITUTE FOR TRUSTEES

Each year, Essex County Community Foundation brings nonprofit leaders together for an exciting day of workshops, idea sharing and networking at our annual Institute for Trustees, recognized as the region's leading educational conference for nonprofit board members and executive directors.

# At the 9th Annual Institute for Trustees, **'Everyone Leads'** Social Change.





On March 24, more than 350 nonprofit leaders gathered at the Pingree School in South Hamilton for the 9th Annual IFT, where keynote speaker Paul Schmitz, CEO at Leading Inside Out and senior advisor at The Collective Impact Forum, discussed Collective Impact, a 2018 focus of ECCF's community leadershp work.

During his talk, Schmitz told the story behind the Montgomery Bus Boycott. But it was not the prepackaged version many of us may remember from history class: the story about one woman who refused to give up her seat on the bus and started a boycott that sparked a national movement. Instead, it was the collective story, created by many, that led to a turning point in our history.

Yes, it was about Rosa Parks and Dr. Martin Luther King. Those are the names you've heard. But it was also about E.D. Nixon and Ella Baker and Fred Gray and Clifford and Virginia Dunn, Ralph Abernathy, and many, many others who all had a critical role in the Boycott.

"Everyone led," he said. "That's Collective Impact."

Conference attendees were clearly energized by Schmitz' talk as they readied for the rest of the day, which included more than 20 workshops in board development, strategic planning, financial management and development, a lunch update of Essex County Community Foundation's Community Leadership Initiatives and a cocktail reception to wind things down.

"I think some of the conversations about collaboration start here," said Susan Hauck from Marblehead Community Charter Public School. "We're lucky to be able to have ECCF."

## LUNCH AND LEARN







# Community Lunch & Learns give people an inside look at nonprofit impact.



A critical aspect of ECCF's mission is to inspire philanthropy by connecting people with local nonprofits that are doing good work in our communities. In 2018, our Community Lunch & Learns, each consisting of a three-hour bus tour, introduced nearly 100 donors and philanthropists to 13 Essex County nonprofit organizations in Lawrence, Lynn and Gloucester that are having a positive impact on the biggest challenges facing our cities and towns, including hunger, poverty, education, economic opportunity, health and more. Through on-site tours, presentations and conversations with nonprofit leaders, participants were able to receive an in-depth look at how these nonprofits are making a real difference.

#### **FY18 LUNCH & LEARNS**

#### LAWRENCE

AUG. 8 & 10, 2017 Windrush Farm Greater Lawrence Community Boating Elevated Thought Groundwork Lawrence Boys & Girls Club of Lawrence Essex Art Center LYNN OCT. 20, 2017 Lynn YMCA Haven Project RAW Art Works Beyond Walls

#### GLOUCESTER JUNE 15, 2018

Pathways for Children The Open Door Gloucester Marine Genomics Institute

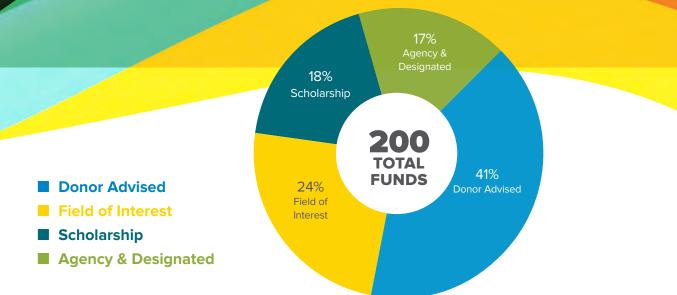


\*Facts and figures as of fiscal year end, June 30, 2018

## ECCF STATEMENT OF FINANCIAL POSITION JUNE 30, 2018 AND 2017

		2018	2017		
ASSETS					
Cash and cash equivalents	\$	1,106,199	\$	1,431,360	
Investments at fair value		67,176,678 58,970,398			
Unconditional promises to give – net	0 3,444,255				
Prepaid expenses and other assets	31,900 20,043				
Fixed assets - net	6,717 16,293				
Annuitized split-interest agreements		446,925		544,553	
Total assets	\$	68,768,419	\$ (	64,426,902	
LIABILITIES					
Accounts payable and accrued expension	ses	\$67,648		\$19,537	
Grants payable		290,900		303,567	
Deferred revenue		10,000			
Fiscal agency liability		113,326	141,014		
Split-interest obligations	446,925			544,553	
Agency endowment funds		13,745,457		11,866,780	
Total liabilities	\$	14,674,256	\$	12,875,451	
Net assets					
Unrestricted	ļ	50,415,244	44,769,512		
Temporarily restricted		1,133,644 4,428,054		4,428,054	
Permanently restricted		2,545,275		2,353,885	
Total net assets	\$	54,094,163	\$	51,551,451	
Total liabilities and net assets	\$	68,768,419	\$ (	64,426,902	

Audit conducted by Anstiss & Co., P.C.



Throughout the years, more than 200 individuals, families, corporations and agencies have established funds with ECCF. With 19 new funds established in fiscal year 2018, ECCF experienced strong growth in managed assets. Each one of our funds provides support based on the donor's intent, from very focused interests such as charter and independent schools to big-picture issues such as health, education and opioid crisis intervention. These funds have given permission to be published.

1115 Fund 82491 Fund ACAC Fund Alacoque-Weber Trust Fund for Catholic **Education Fund** Albert Lunt Trust for Charity Fund Alice M. Hornsey Fund AllBlue Foundation Fund ALMA Fund Amanda P. Craig Fund Amesbury Carriage Museum Fund Andover Coalition for **Education Fund** Andrews Chapel **Restoration Fund** Anita Pacione Evetts Shine on Scholarship Fund Ansara Fund for Essex Countv Arthur L. Flynn Education Trust Fund

0219 Fund

- ASD Fund Astle-Tory Broadhow Fund Ayer Mill Clock Tower **Endowment Fund** Barbara H. Almy Fund **Beyond Scholarship Fund Bishop Family Fund** Brand Fund Brendan Tobin Memorial Fund Bruce Arnold Scholarship Fund Build A Bridge Scholarship Fund CCS Fund Centerville Improvement Society Charity Girls NEMA Chet and Will Griswold Suicide Prevention Fund Christian Angel Smile Fund Christine C. Price Breast Cancer Fund **Clark Smith Fund**
- **Cloven Rock Fund** Colleen Ritzer Scholarship Fund Colucci Family Charitable Fund\* Community Giving Tree General Fund\* Corinne (Morris) Johnson Scholarship Fund Cove Hill Fund\* Creative County Initiative Fund CST Science Scholarship Fund The DCS Fund\* D&P Gleason Charitable Fund David & Mary R. Dearborn Fund
- David Tory Fund
- David Welbourn Fund for Innovation & Collaboration
- Davis Trust Fund

- Dee and Kingman Webster Legacy Fund for Greater Lawrence
- Ditchfield Scholarship Fund
- Dusky Fund\*
- Eamon O'Holleran Fund
- Edna Stocker Trust Fund
- Emergency Fund
- Ernest J. Perry, Jr. Scholarship Fund
- ESI Grantmaking Fund
- ESI Reserve Fund
- ESMV Board Designated Endowment Fund
- Essex Art Center Founders Fund in recognition of Leslie Costello & Helen Tory
- Essex County Forum Fund
- Evelyn Lilly Lutz Foundation Fund
- Farnsworth Fund
- Fink Family Fund
- First Jobs Fund

Francis Family Fund\*

Friends of Andover Tennis

Friends of Anne Bradstreet

Fund for Essex County Excellence

Fund for Essex County Excellence Reserve

The Fund for the Foundation

Fund for Lawrence Public Schools Receivership and Turnaround Plan

Gates-Robertson Fund

George H. Carleton Fund

George McQuinn Memorial Foundation

**Giangrande Family** Scholarship Fund

**Gloucester Maritime** Heritage Center Fund

**GNAR** Fund\*

Goodwin Wragg Land Stewardship Endowment Fund

Grace K. Babson Trust Fund

Greater Lawrence Community Fund

**Greater Lawrence** Summer Fund

Gregory & Deborah Schmidt Charitable Fund

Hamilton-Wenham Friends of the Arts **Reserve Fund** 

Harborlight-Stoneridge **Biolabs Scholarship Fund** 

Harborlight-Stoneridge **Endowment Fund** 

Helen & David Tory Fund

Help in the Nick of Time

Henry Giannantonio Trust Fund

\*new funds added in FY18

Hunger Initiative

Impact Essex County **Endowment Fund** 

Inspire to Act Fund Isabella Rose Marino

Charitable Fund

JCH Fund

JEOL Families Scholarship Fund

Jodoin Fund

John T. Schroeder Memorial Scholarship Fund\*

John W. Peirce Fund

The Johnson Fund

Joseph R. and Margaret M. Doherty Memorial Fund

Josh Quince Fund for Adolescent Services

JT ECCF Fund

JTS Memorial Fund

Junior Board -

Massachusetts\* Kenneth Waldie Memorial Fund

Knapp Family Fund Koumarianos Family

Fund

Krueger Family Fund

The Langille Family Fund Lawrence Development Fund

Lawrence Emergency Fund

Lawrence High School Alumni Association

Lawrence High School Alumni Association Grant **Distribution Fund** 

Lawrence Public Schools College & Career Pathways Fund

The Levenson Legacy Endowment Fund for Community Giving Tree\* Link House, Inc.\*

Lois W. Smith Endowment Fund

Lupoli Family Fund

MADLMU Fund

Margaret Voss Howard **Teacher Recognition** Award Fund

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PLEASE JOIN US IN REMEMBERING THESE ECCF FRIENDS, WHO PASSED AWAY THIS YEAR.

#### DAVID DEARBORN 1937 - 2018



David Dearborn, along with Mary, his wife of 39 years, was a generous ECCF fundholder, donor, member of the Foundation's County Leadership Council and former trustee. He was devoted to supporting a myriad onprofit arts, health and social services organizations. om David always meant a thought-provoking discussion.

#### DR. RICHARD E. WYLIE 1941 – 2018



Dr. Richard E. Wylie, the visionary president of ndicott College for 31 years, was an ECCF donor ad member of the Foundation's County Leadership Council. Dr. Wylie will be remembered for his sense

of humor, love of family and passion for his community and helping others.

#### PATRICIA KARL 1943-2018



Born and raised in Lawrence, Patrica Karl was a devoted advocate for her hometown, especially its youth. A lifetime educator, Patricia was the founder of the Lawrence Family Development Charter School, one s first charter schools. An ECCF fundholder, former dopone Patricia will be remembered for her passionate

trustee and donor, Patricia will be remembered for her passionate and thoughtful philanthropy.



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