

25 YEARS

GIVING
OUR ALL



COMMUNITY FOUNDATION
of WESTERN MASSACHUSETTS



OUR MISSION

The Community Foundation of Western Massachusetts seeks to enrich the quality of life of the people of our region by:

- encouraging philanthropy
- developing a permanent, flexible endowment
- assessing and responding to emerging and changing needs
- serving as a resource, catalyst, and coordinator for charitable activities
- promoting efficiency in the management of charitable funds



Dedicated to Paul S. Doherty

(1934 - 2016)

Paul's vision, energy, and devotion to others made an extraordinary impact on our community, affecting countless lives. His remarkably generous spirit continues to inspire us to do more for others and will be his enduring legacy.

ON THE COVER

Pioneer Valley Riverfront Club rowers traverse the Connecticut River during a rowing lesson. The club is a CFWM grant recipient and Valley Gives participant.

PHOTOS BY
Paul Schnaittacher
Photography



DEAR FRIENDS,

This year, the Community Foundation of Western Massachusetts celebrates its 25th anniversary. In 25 short years, we have distributed \$177 million in grants, scholarships, and loans within the 69 communities in Franklin, Hampshire, and Hampden counties and beyond. We have awarded scholarships to nearly 15,000 local students in order to help them pursue higher education. We have become a leading resource for philanthropy in the region. We have grown from a small staff with a part-time president to a staff of 17 full-time employees. And thanks to the generosity of so many, we now have assets totaling over \$110 million.

What has not changed in the past 25 years is the dedication of our volunteers. The Foundation remains a volunteer-driven organization that sparks charitable giving in our region. We help people, families, and businesses give to causes they care about. We work hard to leverage gifts in order to improve life for all in the Pioneer Valley. We are so proud of all the Foundation has accomplished to date.

In the next 25 years, our plan is to take this sturdy foundation built on a quarter-century of generosity and expand to become an even stronger resource for all. You can expect to see focused growth, a commitment to data-informed decision-making and evaluation, and an increase in strategic partnerships. As the Foundation evolves, you will see more innovation and collaboration taking place, with our volunteers and contributors always at the core.

We extend enormous gratitude to those who have come before us, saluting them for their vision of a more prosperous, just, and vibrant Pioneer Valley. It is our privilege to carry that vision forward with your help — and herald the next quarter-century of generosity for the region.

Sincerely,

KATIE ALLAN ZOBEL
President and CEO

DANA R. BARROWS, CLU, CHFC
Trustee Chair

LOOKING BACK,



COMMUNITY FOUNDATION BUILDS ON 25 YEARS OF IMPACT

Twenty-five years ago, the Community Foundation of Western Massachusetts was formed to meet the needs of the region, and it continues to evolve along with the Pioneer Valley.

Ron Weiss is the Foundation's counsel, one of its founders, and author of the trust agreement that formed the Foundation. Signed November 15, 1990, the trust agreement has a unique format. It is structured so that its Foundation Trustees and Distribution Committee can receive, administer, and distribute funds directly, and at the same time allow banks administering charitable foundations to make them part of the Foundation while continuing to serve as trustee. Distributions are determined by its volunteer Distribution Committee.

In the early days, local banks like BayBank Valley, Shawmut, SIS, and others came on board and put many of their

charitable funds into the Foundation. Today, Bank of America, successor to several of the local banks, remains a strong partner — it is a trustee of charitable funds it made part of the Foundation and uses the Foundation to administer grants from three sizable private foundations.

Weiss said he, several BayBank Valley executives including Dick Stebbins, Peter Weston, and Alan Campbell, and other area residents, began talking about the need for an area community foundation in the late 1980s. One substantial private foundation was set up at the time with the proviso that it be made part of the Foundation when it was formed. When the time for formation seemed right in early 1990, Weiss met with Stebbins and BayBank Valley board chairman Paul Mehrrens to see if they agreed. They did and urged the board of BayBank Valley to get behind the formation of the Foundation. Other



ORIGINAL TRUST SIGNERS

ROBERT B. ATKINSON	RICHARD A. STEBBINS
WILLIAM R. CASS	WILLIAM SADOWSKY
HELEN S. FULLER	DAVID STARR
JOHN G. GALLUP	ALBERT E. STEIGER, JR.
WILBERT LOCKLIN	BRIAN W. THOMPSON
PAUL MEHRTENS	RONALD P. WEISS
ROBERT E. MURPHY	GORDON H. WENTWORTH
JESSE PARKS, III	PETER WESTON
STEPHEN R. SHIRLEY	

MOVING FORWARD

banks quickly agreed with the need for the Foundation and got on board. Stebbins took the lead in bringing key people on board and led the pre-formation meetings of the organizing group.

Attorney Bob Atkinson, a partner of Weiss at Bulkley Richardson, was recruited to help get the Foundation off the ground. He served as the first chairman of the Foundation Trustees. Weiss said that Atkinson was the perfect choice.

“Bob was focused and brilliant, knew a lot of people, and people wouldn’t say no to him,” said Weiss.

He also knew how to make the serious business of the Foundation a bit more lighthearted.

“Bob knew that an emerging organization could get bogged down if the folks involved took themselves too seriously,” said Weiss. “He was also instrumental in consolidating multiple

area scholarship funds into the Foundation to minimize the need for students to file multiple applications for financial aid.”

The founding group included David Starr and John Gallup, who also remain involved in the Foundation.

“When each of us was called to get involved with starting the Community Foundation, it was because we were already engaged in philanthropy and had a demonstrated concern for the community,” Gallup said.

Starr, Gallup, and Weiss all said that from the beginning they felt it was important that the Foundation represent the needs of Franklin, Hampden, and Hampshire counties. At the time, the Foundation was one of the first organizations to do that.

“We knew who the givers were in the community; we just had to convince them to direct their charitable giving through

the Foundation,” said Starr. “Once the Community Foundation got started, we quickly needed to build trust so we could serve the broad needs of those three counties.”

Weiss said the Foundation has done just that and more. He said, “It has become a major philanthropic resource in the region,” and sees it becoming even stronger in the future.

“The Foundation staff is well led, dedicated, efficient, and effective. We are extremely fortunate to have them. They enable the Foundation to proactively leverage its resources and those of other philanthropies to address continuing and emerging needs in the Valley. We’ve come a long way from the days of just reacting to grant requests,” said Weiss. 🍀

VVM Director of Operations Jen Gallant, VVM Founder Paul Silva, and DevelopSpringfield President Jay Minkarah, standing, look over blueprints with VVM Co-Founder and Board President Scott Foster, VVM incoming CEO Liz Roberts, CFWM President and CEO Katie Allan Zobel, and CFWM Vice President for Programs and Strategy Janet Daisley, at the new and future site of VVM on Bridge Street in Springfield.

HELPING BUSINESSES BUILD ON A STRONG FOUNDATION

START-UPS FIND A KEY RESOURCE IN VALLEY VENTURE MENTORS

Valley Venture Mentors (VVM) hosted 126 events, attracted 3,884 participants, awarded \$262,500, helped create 222 jobs, and sparked the generation of \$10 million in 2015. Not a bad year for a start-up designed to help other start-ups.

The first recipient of the new Community Foundation Innovation Grant, VVM was awarded \$300,000 over three years to create the region's first Accelerator Program. The Accelerator is an intensive four-month training program designed to help start-ups build their businesses through training, mentoring, and peer support.

Founding Executive Director Paul Silva said 2016 looks even better, thanks in part to CFWM. "The support of the Foundation is two-fold," said Silva. "It's the funding, of course, and it's the gravitas of the Community Foundation."

Silva said CFWM took a chance on VVM, and he does not take that lightly. "When the Foundation did something a bit unusual by funding us, we were honored," said Silva. "Before the Community Foundation and our other visionary partners — MassMutual, the Irene E. & George A. Davis Foundation, the Commonwealth of Massachusetts, and the Massachusetts Technology Collaborative — we were a volunteer-run organization with a mentorship program, of which we were proud. But we knew we needed to help these start-ups to gain more traction as viable companies."

In VVM's first year, the goal was to help 30 start-ups over three years. Instead, they helped 30 start-ups in one year. One of the reasons, said Silva, was that the VVM model was designed



a little bit differently from other accelerator programs. With their weekend-based training model, they made it more flexible to accommodate people with full-time jobs and families — and people beyond the western Massachusetts borders.

“We really looked at the model of executive MBA programs,” said Liz Roberts, incoming VVM CEO, of the rigorous style program. The model worked. In 2016, VVM expanded the Accelerator Program, and competition was fierce, with former Community Foundation intern Marcie Muehlke taking the top prize.

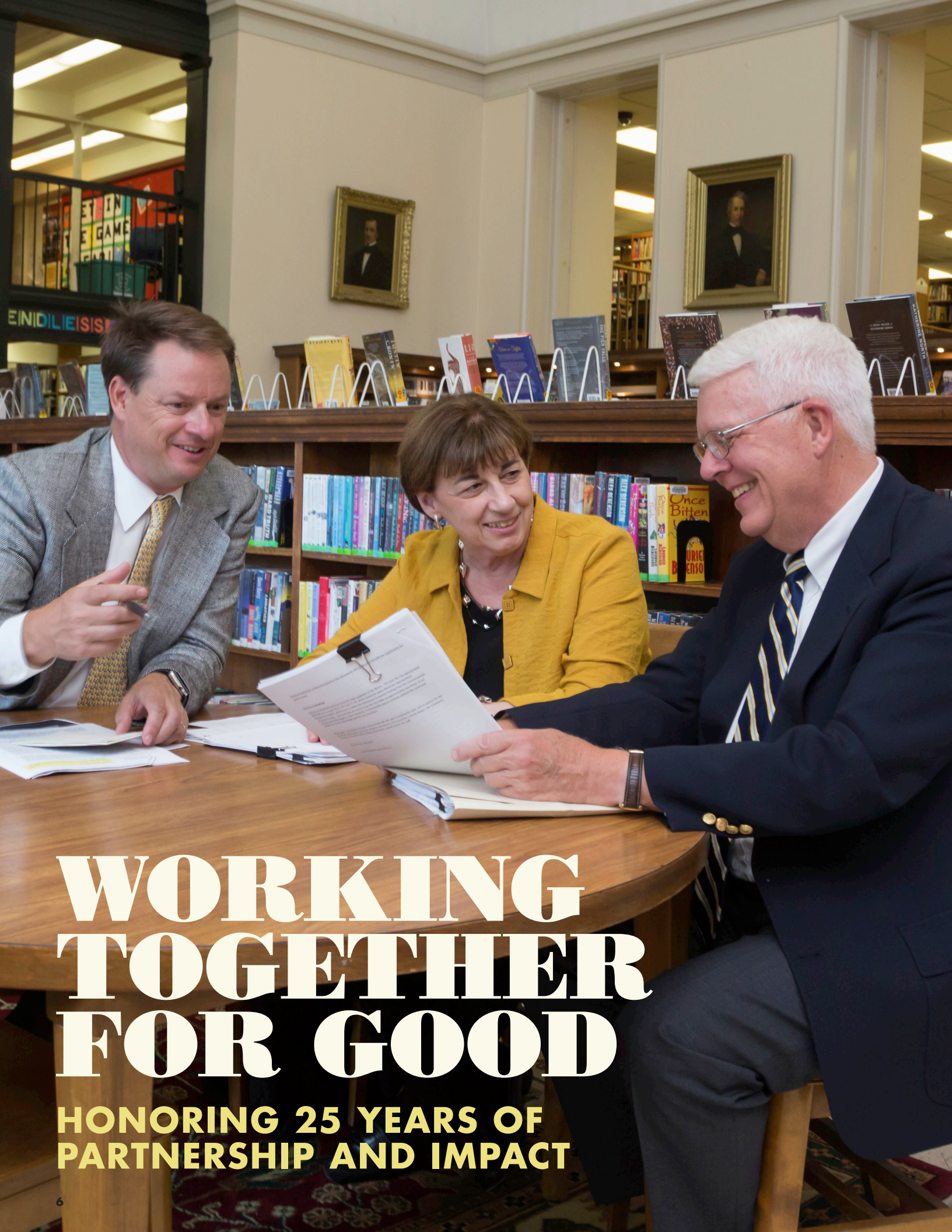
Muehlke owns Celia Grace, an Amherst-based fair trade wedding gown business that was born when Muehlke was unable to find a wedding dress that met her ethical standards.

Other local Accelerator graduates include MachineMetrics, Olive Natural Beauty, and White Lion Brewing Company. “We’ve had 35 start-ups through VVM, and 94 percent of graduates this year said

they would go through the program again,” said Silva.

As VVM prepares for its next Accelerator class, it is also helping companies become more competitive through a program to help them find new business opportunities within their existing business.

VVM is in the process of creating a new space for themselves and other start-ups on Bridge Street, the heart of Springfield’s new Innovation District. They plan to move from their current location in Tower Square to the storefront space in early 2017. “We are really excited to fill that building with start-ups — and the buildings around us, too,” said Roberts. “We want to grow, which helps other companies grow. We know that the Community Foundation took a gamble on funding us — it was a bold and innovative move by them — we hope the job and economic activity our first Accelerator has generated for the region is a great down payment on repaying our debt of gratitude.” 🌱



WORKING TOGETHER FOR GOOD

**HONORING 25 YEARS OF
PARTNERSHIP AND IMPACT**



For a quarter of a century, the Community Foundation of Western Massachusetts has helped improve the lives of people living and working in the Pioneer Valley. Our partner, the Beveridge Family Foundation (BFF), has been doing this for 69 years.

Almost since the formation of CFWM, the BFF has been a Foundation partner and funder. From investing in our startup to providing funds for initial technology purchases and contributing one of our first gifts in 1991, BFF has been a true partner in nearly every step of the past 25 years of the Community Foundation. “We have a wonderful history together,” said BFF President Ward Caswell, adding this is just the beginning.

The BFF was founded in trust in 1947 as the Frank Stanley Beveridge Foundation and was incorporated in 1956 when Frank Stanley Beveridge died. Its first endeavor was in 1949 to support the Stanley Park of Westfield. That foundation eventually became the Beveridge Family Foundation in 2008 with Caswell — the great-grandson of Frank Stanley Beveridge — leading the way. Today, Stanley Park continues to receive the BFF’s largest financial support.

“You’re our second highest recipient of funds,” said Caswell. “We like to think the impact is stronger when we team up.”

One reason this partnership is so strong is a shared mission and values. Both foundations share Frank Stanley Beveridge’s goal of leaving the world of Hampden and Hampshire counties in a better place by investing resources and giving back. Both foundations support nonprofits through a competitive grantmaking process and focus on how to make grantmaking more effective.

CFWM and BFF see the benefit of taking that extra step to visit with nonprofits, and both foundations view education as an important component of making a difference, as evidenced by Beveridge’s involvement in our past initiative — 5 & Under Initiative for children in poverty and their families — as well as continued scholarship support and

involvement in the Funder Collaborative for Reading Success, led by the Irene E. & George A. Davis Foundation, another longtime CFWM partner.

In turn, the Community Foundation staff and volunteers have been actively involved with grant reviews for the BFF, setting an example that collaboration is possible and that we are interested in learning from each other as well as the nonprofit community.

The BFF has shown its commitment to the region and the Community Foundation with nearly \$1.5 million in support to the Community Foundation. The BFF was part of the first Funder Collaborative CFWM organized supporting the Springfield Urban Youth summer programs in the 1990s, with \$25,000 provided over five years. It also directed \$100,000 over two years (2003/2004) through its Hampden-Hampshire Proactive program to supplement 26 CFWM projects to help people in distressed circumstances, and gave \$256,777 in grants to support over 250 scholarship awards over 11 years, with a focus on people with high financial need and renewed assistance to those who continue to do well.

The BFF also serves as a critical partner to Valley Gives, not only providing funds, but encouraging nonprofits to participate.

We do have differences in how we are organized, where our funding comes from, and how we go about doing our work. But in looking at common ground and situations where we can combine our resources and passions, and make a more concerted effort at addressing community problems, we are in a stronger position to be effective and to engage others as well.

Caswell said that over the years, this partnership has strengthened both organizations. “Having a reliable partner like the CFWM gives us someone we can depend upon in times of need,” said Caswell. “Their depth of knowledge and experienced staff are able to meet any challenge we can imagine, and probably many challenges we haven’t even considered.” 🌱

Beveridge Family Foundation President Ward Caswell, CFWM Senior Advisor to the President Nancy Reiche, and Senior Vice President at Bank of America/U.S. Trust and BFF Director Peter Weston review a grant application at the Westfield Athenaeum.

WHAT A DAY



Cyclists enjoy the All Out Adventures adaptive cycling program on a trail in South Hadley. All Out Adventures is a participant in Valley Gives, a program of the Community Foundation.

9,596 UNIQUE DONORS

INDIVIDUALS IN
67 OF 69
TOWNS/CITIES
IN PIONEER VALLEY

INDIVIDUALS IN
202
MASSACHUSETTS TOWNS/CITIES
OUTSIDE PIONEER VALLEY
(77% OF MA)

4,476 DONORS NEW TO VALLEY GIVES

\$1,613,725

RAISED ON VALLEY GIVES DAY 2016

DIFFERENCE MAKES

VALLEY GIVES DAY BRINGS THOUSANDS TOGETHER FOR COMMON CAUSES

Encouraging generosity, expanding the donor base, and building nonprofit fundraising capacity are three of the goals of Valley Gives, a 24-hour online philanthropy event supporting nonprofit organizations in Franklin, Hampshire, and Hampden counties.

What started as a three-year pilot program has evolved into a day of giving now powered solely by the Community Foundation. In 2016, the Foundation launched Valley Gives on its own for the first time and also changed the timing from December to May.

"This was a way to broaden the reach of generosity throughout the year," said Foundation President Katie Allan Zobel.

Valley Gives was held May 3, 2016, and raised \$1.6 million, with 460 nonprofit organizations, schools, and other charitable organizations throughout the Pioneer Valley participating.

This included:

Hampshire County – 174 (38%)

Hampden County – 165 (36%)

Franklin County – 80 (17%)

Additionally, 41 organizations with primary offices outside the Pioneer Valley but serving the region participated. On average, each organization received 22 donations and 54 percent of organizations raised more than \$1,000 on Valley Gives Day.

Of the 9,596 donors (unique individuals), 47 percent, or 4,476 donors, were new to Valley Gives. This is a powerful fact in that one of Valley Gives' goals is to "grow philanthropy" in the Pioneer Valley and is a great example of rising tides lifting all boats.

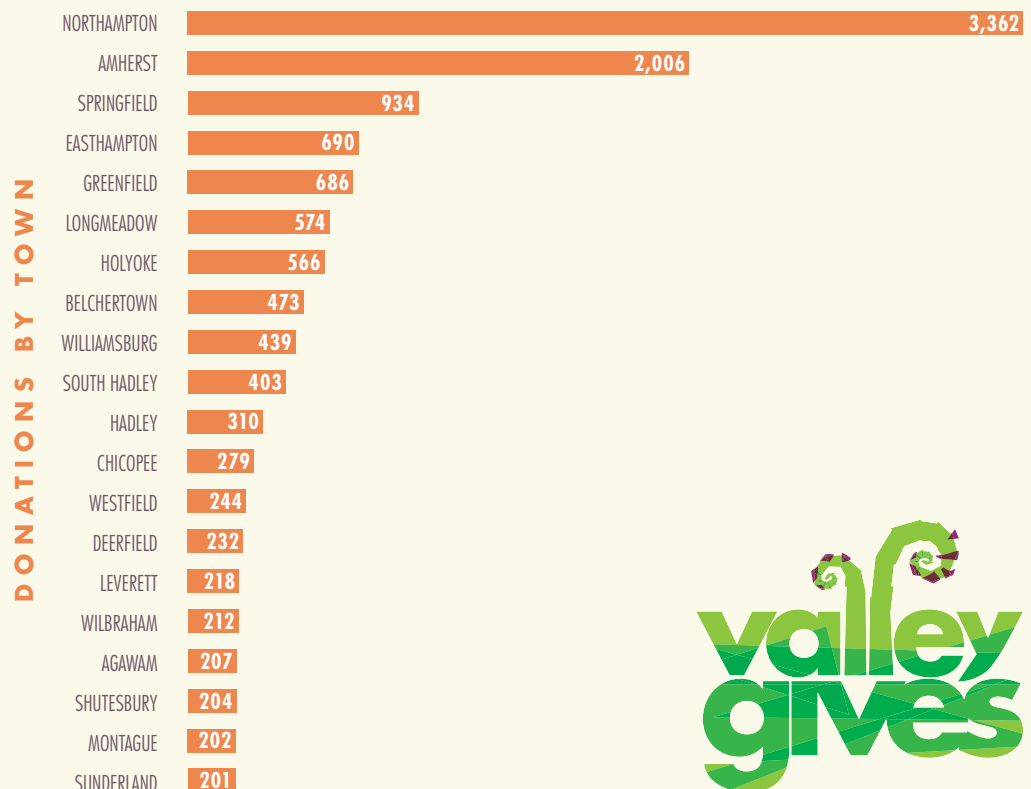
The average donation made during Valley Gives 2016 was \$63.

Donors to Valley Gives are people who live and work here as well as those who have a connection to the Pioneer Valley and yet live across the country and throughout the world. 🌱

19,391
**ONLINE
DONATIONS**



HAMPSHIRE COUNTY: 174 (38%)
HAMPDEN COUNTY: 165 (36%)
FRANKLIN COUNTY: 80 (17%)
PRIMARY OFFICE OUTSIDE PV: 41 (9%)



PUTTING GREAT



Employees of Riverside Industries harvest vegetables in the company's garden. The small farm garden provides produce for local retail stores, and Riverside sells its crops at the Easthampton Farmers' Market.

IDEAS TO WORK

CFWM GRANT BRINGS CUTTING-EDGE APPROACH TO WORKFORCE TRAINING

Last year, Riverside Industries — which has supported people with developmental disabilities for 48 years — took a new and innovative approach to its workforce training program, using a \$15,000 Community Foundation Mission Standard Grant.

With the grant, Riverside was able to begin using the Montessori philosophy in its training, and the result is a more confident, independent group of people working in the community. “As of June 30, 2016, Massachusetts is the fourth state in the country to move away from sheltered workshops to integrated community workplaces for people with developmental disabilities,” said Kyle Schaller, director of employment at Riverside Industries. “It was a bold shift of resources.”

Because many of Riverside’s participants thrive with routines and familiar surroundings, Schaller said planning the transition was paramount to their success. “We had three years to make the transition, and we needed to do it very thoughtfully,” she said.

The CFWM grant allowed Riverside to hire Montessori consultant Heather McLean to create a training program that uses custom-designed, Montessori-based, job-skills training materials.

McLean explained that the Montessori approach uses hands-on materials that isolate the difficulty of each skill required for specific job tasks. Participants enjoy choosing the materials and skills they would like to develop. They track their own progress and celebrate each others’ successes. By using the materials on a regular basis, participants have become more engaged and interested in their training. Most are able to concentrate for



Riverside Industries employees work hard in the company’s garden in Easthampton.

longer periods of time and have improved their fine and gross motor coordination. Their success has bolstered their confidence and independence, which has led to many getting and keeping jobs in the community. “The Community Foundation grant was a game changer for us by providing the ‘seed capital’ to implement a new program innovation,” said Schaller.

For the employees and their families, the transition was well received and widely considered a great success. “They love it,” said Schaller. “Everyone is thriving and loving being part of the community.”

With the CFWM grant, Riverside was able to create a Montessori training room that includes a mock grocery store to train participants to stock and bag groceries, a retail set-up to train how to hang and fold clothing — which Schaller said doubles as life-skills training — as well as spaces to train for custodial positions, clerical work, and more. “The reason we wanted this grant

and wanted this training was to give people with developmental disabilities access to the community,” Schaller said. “They are contributing members of society.”

CFWM Distribution Chair Liz Sillin noted “grantees, such as Riverside, really make the role of reviewing grants very rewarding for our volunteer grant reviewers. It’s a pleasure to fund projects that have such impact on people’s lives.”

Schaller said engaging Riverside participants in volunteerism through local nonprofit organizations was another benefit of the program.

“Thanks to this grant, we are helping raise their level of social skills and job skills and connecting them to the communities up and down the 91 corridor,” said Schaller.

Riverside Industries, located in Easthampton, supports people from age 18 into their 70s in all three counties of the Pioneer Valley. 🌱

CREATING A LEGACY OF OPPORTUNITY

PHILANTHROPIST PARTNERS WITH COMMUNITY FOUNDATION TO CHANGE LIVES



Springfield resident Russell Seelig began a relationship with the Community Foundation 15 years ago — and around that same time, he also formed a bond with students and teachers at the Roger L. Putnam Vocational-Technical High School.

Seelig was working to revive the Forest Park neighborhood where he lived through the Concerned Citizens for Springfield, Inc. when he was encouraged by the mayor and housing director to reach out to Putnam. Students began working with the Concerned Citizens to enhance the Forest Park section of Springfield. “They built two homes and refurbished another,” said Seelig.

Impressed with the students and inspired by the instructors, Seelig wanted to help other young men and women at Putnam beyond their high school years. In 2015, he started the Seelig Family Scholarship Fund, which will give its first awards in 2016 to Putnam students in STEM (Science, Technology, Engineering, and Math) programs, and he has plans to continue giving past his years with a legacy fund. “There will always be kids in need,” Seelig said of his legacy intentions.

Seelig, who retired from Monsanto in 1985, raised three sons, and was able to finance their college education through real estate investments. Seelig acknowledged that not everyone is able to do that, and he wanted to help. “I had the wherewithal to do it,” he said. “There are very capable students who don’t have opportunities. A lot of kids in vocational schools have many talents, and this way, I can enhance their future — and the community.” 🌱

LEAVING THE LEGACY OF A BETTER TOMORROW

The Community Foundation of Western Massachusetts helps many local individuals articulate their vision for a better community and world beyond their lifetime and develop the plans to achieve that vision through charitable giving.

The causes are as varied as the people who support them, from feeding hungry families, to protecting the landscape we all enjoy, to creating cultural experiences that educate and inform, to helping students realize their college dreams. The support of the Foundation’s Legacy Society members is evident in the beauty and vitality of western Massachusetts. Donors become members of the Legacy Society through any of the following arrangements:

- Bequest by Will or Trust
- Designation as Beneficiary of Qualified Retirement Plan Assets
- Gift of Life Insurance Policy
- Charitable Remainder Trust
- Charitable Lead Trust
- Charitable Gift Annuity

Learn more about how we can work with you to create a plan for your legacy, or if you have already made similar arrangements, so that we may recognize everyone who supports the long-term mission of the Community Foundation. To discuss becoming a member of the Legacy Society, call the Philanthropic Services Team at 413-732-2858 or email us at giving@communityfoundation.org.

PHILANTHROPY IS ALL IN THE FAMILY

NOVAKS CULTIVATE A CULTURE OF GIVING — AT HOME AND BEYOND

Kasia and Peter Novak grew up giving, but in very different ways.

Peter's family was blue collar and owned a small business and gave what they could financially to their church. Kasia's family gave their time and welcomed people into their home who had no one else. Holidays were a lively mix of international students, residents of local nursing homes, and family.

Years later, the Novaks are passing on to their children their traditions of giving back through the Novak Family Fund at the Community Foundation.

The fund started out more than a decade ago as a way to help entrepreneurs in the region. When Peter requested that gifts for his 50th birthday be made to the fund, it grew and evolved into a more traditional donor-advised fund. But the Novaks are not all that traditional. "When I opened our Community Foundation letter last year and saw our fund balance, I realized that it



was time to make some recommendations of gifts," said Kasia. "I also decided it was time to pass this on to our children."

The Novaks have three children: Alexandra, 27; Adam, 25; and Caroline, 22. They grew up in a home where philanthropy was taught from a young age. "I've always said 'to whom much is given, much is expected,' and they always knew everyone was welcome at our table," said Kasia.

Alexandra, a teacher in New Haven; Adam, a mutual funds wholesaler in Boston; and Caroline, a student studying social work focusing on juvenile justice, set out to explore where they wanted to give. "They did their research and all found places to give that really align with what they're doing," said Kasia.

Alexandra chose a literacy program, while Adam gave to Suit Up Springfield, and Caroline chose two charities that work with at-risk youth.

Kasia and Peter are proud parents and plan to continue their new tradition again this year at the holidays. Kasia said having their fund at the Foundation was never a question. "The Community Foundation was the only option we considered," she said. "It's local, and we started out by trying to help local businesses. We have trust in the Foundation and I love that the people there are helping the community in a responsible, meaningful way." 🌱

CURRENT LEGACY SOCIETY DONORS

Dana R. Barrows
S. Prestley and Helen Blake
Barbara H. Braem-Jensen
Mary Lord Brown
Marcia E. Burick
Priscilla Carter
Thomas J. Chechile
and Frances M. Chechile
Shera Cohen
Jill Ker Conway
Kenneth Cote and Elaine Alonso
Dianne Fuller Doherty
Kent and Scottie Faerber
Jack and Deb Ferriter
Maurice and Peg Ferriter

Karen Fisk and Maurice Proulx
Edward Fleming, III and Jane Fleming
Ian Fraser
Norma Friedman
Paula and John Gallup
Theodore and Norma Gewanter
Frederick Griffiths
Lester and Roberta Halpern
Teresa A. Harris
Wil Hastings
Jean vonL. Hayes
Amy Jamrog and Kim Cook
Charles M. Johnson
Frances Gengle Keenan
Bruce Kurtz

Edward and Catherine Lamoureux
Kristin B. Leutz
Edward and Shirley Livi
Susan Lowenstein
Susan and Morton Lynn
Mary-Lou Mehrrens
Richard Milstein
Steven and Moira Mitus
Susan Monks
Dr. Robyn A. Newhouse
Louis F. Oldershaw
Karen Parker
Priscilla L. Pike
Cecile Ploran
John F. Ptaszek, Jr.

Eleanor Rothman
Terry and Frances Ryan
Donald and Patricia Savage
Barbara Shaffer
Robert C. Smith
Jane Sommer
Gladys B. Sullivan
Robin C. and Audrey A. Taylor
Frances A. Townsend
Richard and Sandra Wallis
Robert and Eileen Zewski
Katie Allan Zobel
Anonymous (26)

A recipient of the Latino Scholarship speaks during the LSF 25th anniversary banquet in spring 2016.



Photo courtesy of Ed Cohen and The Republican

OPENING DOORS TO OPPORTUNITY

PARTNERS COME TOGETHER IN SUPPORT OF LATINO SCHOLARSHIP

Twenty-five years ago, around the same time the Community Foundation began, a group of Latino friends and educators sat around a kitchen table to discuss how to help Latino students succeed beyond high school.

Frustrated by the lack of scholarships received by Latino students, Angel Nieto, Carlos Vega, Sylvia Galvan, Gloria Arce, Aida Oquendo, and others began meeting to brainstorm how best to respond. The result was the Latino Scholarship Fund (LSF), one of many scholarships

administered by the Foundation.

Donations totaling over \$2,000 were received that first year. Since that time, the number of students receiving the award has grown through the support of community groups, local college staff and faculty, and LSF friends. With the help of a challenge grant by a local entrepreneur, the continued support of PeoplesBank, and the association with the Community Foundation of Western Massachusetts, the LSF was able to grow and expand its reach, and its annual award banquet has since

become a major celebration of local Latino achievement.

At this year's annual banquet, held at the Log Cabin, the LSF awarded \$1,500 each to 25 Latino students in Hampshire and Hampden counties who were selected through the Foundation scholarship review process.

"Working with the Community Foundation of Western Massachusetts has been pivotal to our efforts and enabled the fund to reach more students," said Latino Scholarship Fund Board Director Maddie Marquez. "It is essential that our efforts are transparent, well known, and above reproach. Partnering with the Community Foundation helps to ensure that these three objectives are met. It also has allowed us to reach more young people in the community and simultaneously allowed students who have become familiar with the LSF to complete the single CFWM application to become eligible for other community scholarships offered through the CFWM as well."

CFWM volunteers review scholarship applications. Students are selected on the basis of need, academic achievement, and community involvement. Many of the applicants have overcome adversity to pursue their dreams of education and success. "This scholarship's very existence and the experience of attending the dinner have given hope to students aspiring to attend college and helped to change lives," said Marquez.

Past recipients are invited to attend the dinner in future years to welcome the new recipients and to encourage their sense of community. In addition, recipients meet LSF banquet honorees — Latino and non-Latino adult professionals working in a range of fields to improve and enrich communities in the region.

LSF continues to reach out to individuals and institutions to meet the pressing need for financial support.

"Working with the CFWM has allowed us to better serve deserving students of very limited means in the greater Holyoke/Springfield area," said Marquez. "Ours has proved to be a partnership whose accomplishments and promise bode well for students and community alike." 🌱

BUSINESS LEADERS IN PHILANTHROPY

A PROFILE IN CORPORATE CITIZENSHIP: UNITED PERSONNEL



Tricia Canavan, president of United Personnel, began her relationship with the Community Foundation several years ago when she was working for a local nonprofit and needed some advice. “I was new to fundraising and I needed help,” she said. Not only did she find the assistance she was seeking, she forged a partnership that has continued through the next phase of her career.

In 2011, Canavan became president of United Personnel, the staffing company her parents started 32 years ago, and found herself in a position to help the Foundation. “There are three pillars of our company’s mission, and one of them is to give back to the community,” she said.

Today, United Personnel supports the Foundation in a variety of ways, including joining the Business Leaders in Philanthropy Program. “In addition to financial support, we like to leverage our expertise to help nonprofits,” said Canavan.

To celebrate the grand opening of United Personnel’s new office at 289 Bridge Street in 2016, Canavan wanted to do something for the community and announced the creation of the United Personnel Future Scholars Fund. This scholarship fund, to be administered by the

Foundation, will help students further their education.

Canavan said it is important for business leaders to join with nonprofit organizations to advance the community. “If you do business in the Pioneer Valley, your success is distinctly place-based — whether you hire locally educated employees, have staff members with kids in the schools and after-school programs, or benefit from providing goods or services to local residents or organizations — all of what we are able to achieve is due to where we live and work,” she said. “I believe it is our responsibility to give back, support the people and environment that allow our organizations to thrive, and create the best community that we can through financial support, volunteer service, and shared expertise.”

Canavan said the Community Foundation makes the Pioneer Valley a better place to work, live, and study for all who live here. “The Foundation’s strategic vision on how best to help our region — and its residents — achieve our full potential is one that business and community leaders must support, both because it’s the ‘right thing to do,’ and because there is a direct benefit to our clients, our organizations, and our employees,” Canavan said. 🌱

PREMIER SPONSOR



PLATINUM SPONSORS

GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSORS



**25-YEAR
IMPACT**
(IN DOLLARS)



**2016
IMPACT**
(FISCAL YEAR)

**1,521
CONTRIBUTORS**

\$11 MILLION DONATED

\$9 MILLION DISTRIBUTED
THROUGH GRANTS, SCHOLARSHIPS, AND LOANS

**150
ACTIVE
VOLUNTEERS**

**69 COMMUNITIES
SERVED**

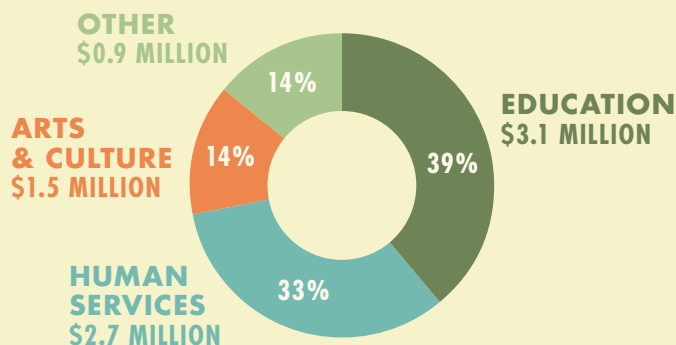
ABOUT OUR CONTRIBUTORS

TOTAL DONATIONS
\$11 Million

(INCLUDING FUND-TO-FUND DONATIONS)

FRANKLIN	37%
HAMPDEN	34%
HAMPSHIRE	15%
OUTSIDE PIONEER VALLEY	14%

GRANT AWARD TOTALS BY PROGRAM AREA



SCHOLARSHIPS AND LOANS

**TOTAL SCHOLARSHIPS
AND LOANS AWARDED**

\$1.9 Million

**800
RECIPIENTS**

TOP 10 COLLEGES/UNIVERSITIES RECEIVING SCHOLARSHIP FUNDS

UNIVERSITY OF MASSACHUSETTS, AMHERST	\$ 213,400
WESTERN NEW ENGLAND UNIVERSITY	\$ 149,000
WESTFIELD STATE UNIVERSITY	\$ 116,380
AMERICAN INTERNATIONAL COLLEGE	\$ 69,350
UNIVERSITY OF MASSACHUSETTS, DARTMOUTH	\$ 66,850
SPRINGFIELD TECHNICAL COMMUNITY COLLEGE	\$ 57,709
BENTLEY UNIVERSITY	\$ 47,000
SPRINGFIELD COLLEGE	\$ 45,200
HOLYOKE COMMUNITY COLLEGE	\$ 45,050
BAY PATH UNIVERSITY	\$ 37,800

ALL ON THE SAME PAGE



FUNDERS COME TOGETHER TO SUPPORT EARLY LITERACY

The Funder Collaborative for Reading Success has engaged 18 local funders since 2010 to support a Springfield early literacy initiative called Reading Success by Fourth Grade. The Foundation is a partner in the Funder Collaborative and holds and administers the fund.

Led by the Irene E. & George A. Davis Foundation, the overall intent of the initiative is to improve grade-level reading in Springfield. Phase 1 priorities were to support the development of children's language, emergent literacy, and reading skills. During Phase 1, the collaborative raised \$1.3 million and distributed grants to 11 organizations totaling \$1 million. In FY2016, a grant of \$50,000 was awarded to the Regional Employment Board of Hampden County for the Hasbro Summer Learning Initiative. Additional funders are welcome to participate.

The collaborative completed its Phase 2 planning process in FY 2016 and recently sought proposals through a competitive process to make grants focused on two key areas:

- 1) Family engagement directed at building the capacity of families to support the early language and literacy development of their child(ren); and
- 2) Improving the quality of early education and care programs to better prepare children to enter kindergarten ready to progress on track to becoming proficient readers by the end of third grade. 🌱

CONTRIBUTORS

Babson Capital Management, LLC
Bank of America, Charles Hall Foundation
Baystate Health Systems, Inc.
Berkshire Bank Foundation
The Beveridge Family Foundation
Community Foundation of Western Massachusetts
Irene E. & George A. Davis Foundation
Farmington Bank Community Foundation
First Niagara Bank
Hampden Bank Foundation
MassMutual Financial Group
Nellie Mae Foundation
Peoples United Community Foundation
PeoplesBank
SIS Charitable Fund at the Community Foundation
TD Charitable Foundation
United Bank Foundation
United Way of the Pioneer Valley

NEW FUNDS OF THE COMMUNITY FOUNDATION

There are nearly 600 funds held by the Community Foundation, which have been created either for the benefit of or by residents of the Pioneer Valley. They translate the extraordinarily generous spirit of the region into an invaluable community resource.

A complete list of all Community Foundation funds can be found on our website at: communityfoundation.org, or by request by emailing giving@communityfoundation.org or calling 413-732-2858.

NEWLY ESTABLISHED FUNDS

The following 17 new funds were established at the Foundation in the fiscal year that ended March 31, 2016. We are deeply grateful for these welcome additions to the community resources available to the Pioneer Valley. 🌱

Anonymous Fund #16
Aster Fund
David Bigda Memorial Fund
First Sergeant Kevin A. Dupont Leadership Fund
Winn Farlow Fund
Timothy H. and Eleanor D. Fowler Memorial Fund
Franklin County Education Fund
Elizabeth M. Huller Scholarship Fund
Thomas M. and Frances Gengle Keenan Fund for the Community Music School of Springfield
For the Love of Nature Fund
Mary Jean and Mariel Picknelly Fund
Martin and Margaret Schoenemann Family Fund
Seelig Family Scholarship Fund
September Fund
Mary Ann and Richard Spencer II Fund
The Tuohey Family Fund
The Wisteria Fund

FINANCIAL HIGHLIGHTS

INVESTMENT COMMENTARY 2016

The Community Foundation of Western Massachusetts' Global Growth Portfolio generated a -3.0 percent return in fiscal 2016. Over the past 10 years, the Global Growth Portfolio has grown from \$42.2 million to \$70 million.

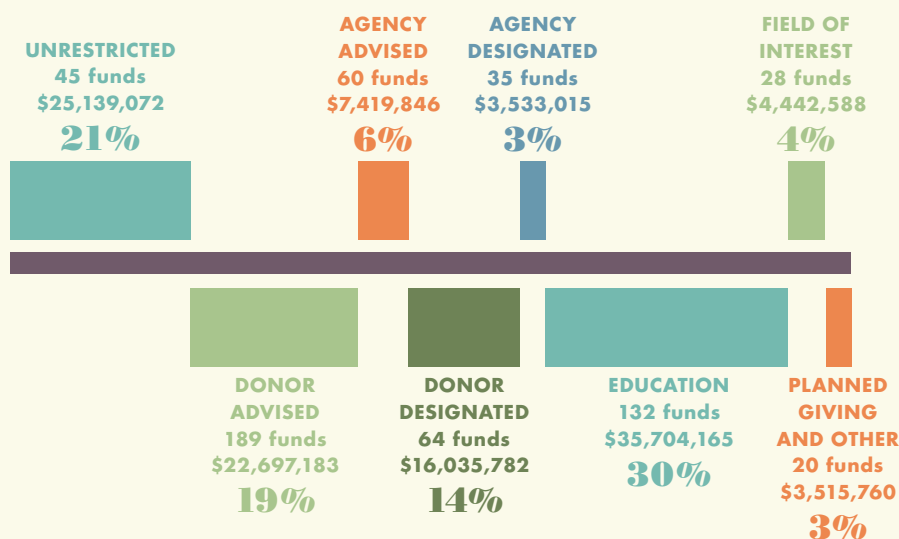
With returns of 8 percent (net of investment related fees), the Global Growth Portfolio's performance exceeded the Wilshire Trust Universe. CFWM'S 10-year return ranked comfortably in the top half (+1.1 percent annualized above the median) of the Wilshire Trust Universe conducted by Wilshire Associates.

CFWM's excellent long-term record stems from a disciplined and diversified asset allocation policy and an emphasis on lower-cost investment solutions.

The long-term overriding benchmark for the Global Growth Portfolio is 40 percent Wilshire 5000 Index, 30 percent FTSE All World Ex-US, and 30 percent Barclays Aggregate Bond Index.

Assets at fiscal year-end were invested in 38 percent US Equity, 26 percent Non US Equity and Emerging Markets, 9 percent Direct Hedge Funds, 7 percent Private Equity Related Investments, 5 percent Real Assets, 15 percent Fixed Income. 🌱

Assets by Fund Type



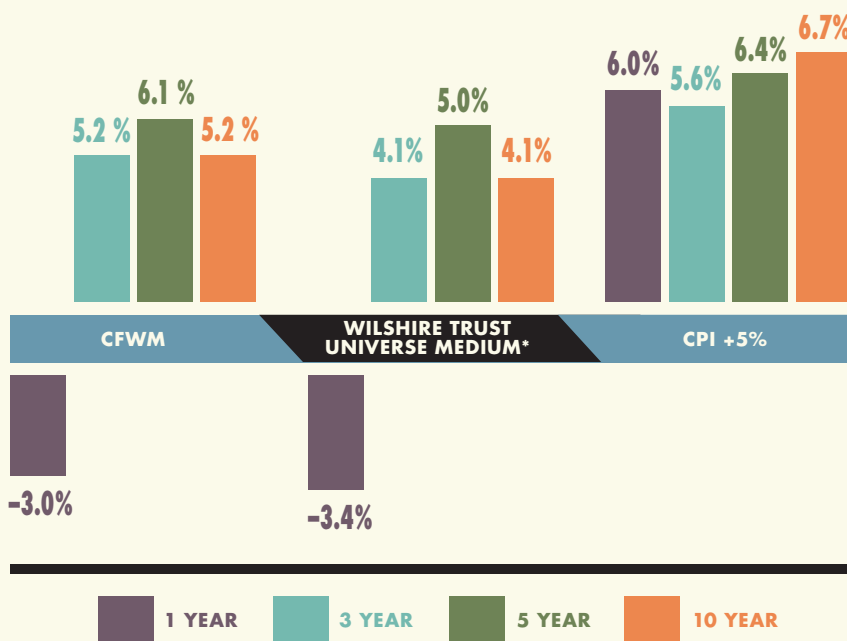
573 Total Funds **\$118,487,411**

plus Bank of America Trust Assets (3 funds) **\$23,612,036**

TOTAL \$142,099,447

Comparison of Returns on Investments

Period ending March 31, 2016



*Net of fees

	2016	2015	2014	2013	2012
TOTAL ASSETS¹	\$ 142,099,447	\$ 146,940,297	\$ 140,228,035	\$ 128,428,853	\$ 121,311,323
OPERATING EXPENSES²	\$ 1,949,771	\$ 1,680,732	\$ 1,623,958	\$ 1,805,203	\$ 1,449,892
OPERATING EXPENSES AS A PERCENTAGE OF TOTAL ASSETS	1.3%	1.1%	1.2%	1.4%	1.1%
CONTRIBUTIONS³	\$ 10,731,355	\$ 7,328,999	\$ 7,657,279	\$ 6,185,121	\$ 7,810,932
GRANTS⁴	\$ 8,604,591	\$ 6,387,823	\$ 7,197,052	\$ 7,304,079	\$ 6,869,986

¹ Includes trust assets owned by Bank of America for which the Community Foundation provides grantmaking services.

² Does not include investment management fees.

³ Includes fees received from Bank of America for providing grantmaking services.

⁴ Includes grants from trust assets owned by Bank of America for which the Community Foundation provides grantmaking services. Does not include educational loans.

Statements of Financial Positions

March 31, 2016 and 2015

ASSETS	2016	2015
Cash and money market funds	\$7,424,970	\$5,461,452
Investments	104,633,065	109,041,989
Assets held under charitable trusts	2,880,534	3,200,200
All other assets	3,548,842	3,596,497
Total Assets	\$118,487,411	\$121,300,138
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable and accrued expenses	\$85,784	\$64,867
Liability under unitrust agreements	1,658,311	1,888,222
Agency funds	8,371,819	8,580,919
Total Liabilities	10,115,914	10,534,008
Net Assets		
Unrestricted	31,420,490	30,954,045
Temporarily restricted	72,260,046	75,121,124
Permanently restricted	4,690,961	4,690,961
Total Net Assets	108,371,497	110,766,130
Total Liabilities and Net Assets	\$118,487,411	\$121,300,138

Distributions 2015-2016

MISSION GRANTS	\$984,704
BANK OF AMERICA MISSION GRANTS	820,200
ADVISED AND DESIGNATED GRANTS	5,127,599
SPECIAL PURPOSE	147,098
SCHOLARSHIPS AND EDUCATIONAL LOANS	1,909,059
TOTAL	\$8,988,660

COMMITTEES

As of August 1, 2016

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Community Foundation of Western Massachusetts Trustees gather for the 25th time in Tower Square.
 Back: Douglas A. Theobald, Legal Counsel Ronald P. Weiss, David E. Pinsky, Ralph S. Tate, Dana R. Barrows, Paul R. Murphy, John Gallup, founding trustee.
 Front: Irene Rodriguez Martinez, Ellen Brout Lindsey, Robert L. Pura, Karin L. George, Elizabeth H. Sillin, Mary-Beth Cooper, and Amy Jamrog.
 Not pictured: George E. Arwady, Sanford A. Belden, Kamari Collins, Kerry L. Dietz, Dianne Fuller Doherty, Willie L. Hill, Theresa L. Jenoure.

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Hope E. Tremblay
COMMUNICATIONS MANAGER

Ronald P. Weiss, Esq.
LEGAL COUNSEL

UNRESTRICTED FUNDS

The following funds typically utilize the two greatest strengths of the Community Foundation: the ability to care for charitable funds in perpetuity and the considerable expertise of the Foundation's distribution committee and its competitive grantmaking process. Together, they ensure that scarce funds will be used as effectively as possible, for as long as possible.

**ANONYMOUS MEMORIAL FUND
\$19,073**

For critical needs in Hampshire County.

**LUCY AND BOB ATKINSON FUND
\$60,411**

To support projects and/or programs focused on conserving or enhancing the natural environment in Franklin, Hampden, and Hampshire counties.

**B&E YOUTH FUTURES FUND
\$19,765**

To support programs that serve youth in Hampden, Hampshire, and Franklin counties, with a preference for programs engaging youth with the environment, and that serve residents of Holyoke.

M. CONSTANCE BRECK MEMORIAL FUND \$379,009

To support charities selected

by the Distribution Committee.

BRENDLER FAMILY CHARITABLE FUND \$23,979

To respond to community needs.

THE BUXTON CHARITABLE FOUNDATION FUND, BANK OF AMERICA, TRUSTEE \$2,181,211

For grantmaking in Hampden County.

RAYMOND E. AND MILDRED G. CLARK FOUNDATION FUND, BANK OF AMERICA, TRUSTEE \$3,777,918

For grantmaking in Springfield, MA, and contiguous towns.

CAROL CRAIG COMMUNITY GRANTMAKING FUND

To support the community's greatest needs through the competitive grantmaking process administered by the Distribution Committee of the Foundation.

CREDIT DATA SERVICES, INC. FUND \$6,548,615

To benefit charities in western MA.

IRENE E. AND GEORGE A. DAVIS FUND \$209,920

To assist in the growth of the Foundation.

DELSKEY FAMILY FUND GRANTS

Support for homelessness, hunger, family violence and nature/conservation, as determined by the Distribution Committee.

MARK DOUVILLE CHARITABLE FUND \$41,579

To support public charities in Hampden, Hampshire, and Franklin Counties, Massachusetts selected by the Distribution Committee of the Foundation for the support of charitable work assisting persons with HIV-AIDS.

GEORGE H. EMPSALL CHARITABLE FUND \$119,046

For the support of recognized and worthy charitable and educational organizations in and about Springfield.

KENT W. FAERBER FUND \$133,460

For projects selected by the Distribution Committee, with preference for the establishment and maintenance of individual fundraising programs.

FILLER COMMUNITY FUND \$20,685

To support charitable needs of the Pioneer Valley.

FOWLER FUND \$298,737

To support charities as selected by the Distribution Committee.

**TIMOTHY H. AND ELEANOR D.
FOWLER MEMORIAL FUND**

\$366,522

To benefit the Center Church, Historic Deerfield, and to support charities with preference for projects serving residents of South Hadley and/or Holyoke as selected by the Distribution Committee.

FRANKLIN FUND \$3,190,813

For charitable uses and/or projects which improve the lives of residents of Franklin County.

FRANKLIN FUND #2 \$52,142

For the support of charitable work in Franklin County.

**FUND FOR HAMPSHIRE AND
FRANKLIN COUNTIES \$74,259**

For grantmaking in Franklin and Hampshire counties.

**MARGOT L. GRIGGS CHARITABLE
FUND \$36,391**

To support projects selected by the Distribution Committee.

HAMPSHIRE FUND \$20,612

For charitable uses and/or projects which improve the lives of residents of Hampshire County.

**TERESA A. HARRIS FUND
\$17,087**

To support projects that meet the community's greatest needs as determined by the Distribution Committee.

**JOHNSON CHARITABLE TRUST
\$45,132**

For grants to meet community needs.

**JOHNSON MEMORIAL HOSPITAL
FUND \$38,230**

To support the capital needs of Johnson Memorial Hospital.

**ROCKWELL KEENEY, JR. CHARITABLE
FUND \$24,180**

For grants to meet community needs.

**EDWIN P. AND WILBUR O. LEPPER
FUND \$1,334,245**

To help organizations that support physically or mentally challenged citizens and environmental conservation, as selected by the Distribution Committee.

**MISSION GRANTMAKING FUND
\$9,796**

To support charities in Franklin, Hampden, and Hampshire counties.

GAGE OLMSTEAD FUND \$1,109,902

To support the work of the Community Foundation of Western Massachusetts.

**SALLY GAGE OLMSTEAD OPERATING
ENDOWMENT \$91,347**

To support the work of the Community Foundation of Western Massachusetts.

**SALLY GAGE OLMSTEAD
UNRESTRICTED GRANTMAKING
FUND \$139,030**

An endowed fund to support projects that meet the community's greatest needs as determined by the Distribution Committee.

**HAROLD SEEWALD CHARITABLE
FUND \$13,677**

To support social, creative, and philosophical projects.

**ELEANOR AND PHILIP SINGLETON
ENDOWMENT FUND \$183,821**

To support charitable work in the Pioneer Valley in the arts, educational programs, care for the elderly, and the beautification of the environment.

**ALBERT STEIGER MEMORIAL FUND
\$1,725,067**

Supporting public charities serving the residents of Hampden County, as selected by the Foundation's Distribution Committee.

**WILLIAM WELLS TAPLEY FUND
\$15,342**

To support the charitable work

of the Pioneer Valley.

**ROGER G. AND JEANNIE HOUSTON
TURGEON FUND \$36,231**

To support charities selected by the Distribution Committee, with a preference for charities designated by the donor.

**MARY E. TUTTLE COMMUNITY
ENDOWMENT FUND \$102,915**

To support charities selected by the Distribution Committee.

UNRESTRICTED FUND \$107,013

To benefit the people in western MA communities.

**JOAN WALKER MEMORIAL FUND
\$766,082**

To benefit the people served by the Community Foundation.

**JAMES D. WATT CHARITABLE FUND
\$499,620**

For local organizations with a preference for supporting projects in the arts, in music, and in Hampshire County, MA.

**YALE GENTON CHARITABLE FUND
\$40,274**

For grantmaking projects serving poor children, preferably in Hampden County.

FIELD OF INTEREST FUNDS

Field of interest funds enhance their impact by concentrating on specific areas of charitable endeavor. If desired, they can also utilize the expertise of the Distribution Committee and its competitive grantmaking process.

ABC LONGMEADOW FUND \$276,496
To continue the mission of ABC Longmeadow, Inc.

ART & SOLES FUND \$26,199

To benefit public art projects in Springfield.

**BALDER SOMMER FUND FOR
CHILDREN'S HEALTH \$45,022**

To support the work of the Foundation in the areas of child health and nutrition, and healthy birth outcomes for those living in poverty in Springfield or Holyoke, MA.

E. HERBERT BURK FUND \$390,257

To encourage and develop interest in and training for the precision machining skills needed for the industries of western MA.

**HERBERT AND JOSEPHINE BURK
NOBLE HOSPITAL FUND \$707,414**

To support Noble Hospital in Westfield.

**HERBERT AND JOSEPHINE BURK
WESTFIELD ATHENAEUM FUND
\$419,484**

To support the Westfield Athenaeum.

CANCER FUND \$19,691

To support cancer research and projects.

**VICTORIA CYRAN AND ANN SZETELA
MEMORIAL FUND \$146,501**

To provide support for the St. Stanislaus Church and the St. Stanislaus School, Chicopee.

**THE DICKINSON FAMILY FUND FOR
HISTORICAL HEATH \$450,165**

To preserve the agricultural and historical aspects of the Town of Heath.

**DUFFY SULLIVAN ADULT EDUCATION
FUND \$51,729**

To support literacy programs and adult education.

**JULIUSZ FEIGENBAUM FUND
\$75,669**

To support programs that enable impoverished families with children five years of age and younger to improve their lives by addressing the root causes of their poverty.

**FUND FOR THE HEARING IMPAIRED
FUND \$14,122**

To support Willie Ross School for the Deaf and Clarke School for the Deaf.

**FUND FOR THE HUNGRY
AND HOMELESS \$26,146**

To support programs that help people with basic survival needs.

**FUND TO PRESERVE FARMLAND AND
OPEN SPACE IN FRANKLIN COUNTY
FUND \$18,227**

To preserve farmland and open space in Franklin County.

**T. MARC FUTTER HAMPSHIRE ARTS
ENDOWMENT FUND**

To support the arts in Hampshire County.

**HEALTHIER COMMUNITIES FUND
FUND \$18,037**

To promote children's health and well-being.

**JUNIOR LEAGUE OF HOLYOKE FUND
FUND \$18,523**

To address the emerging and changing needs of women and children in Holyoke.

**ALIE AND REM LEFFERTS MEMORIAL
DIXIELAND JAZZ FUND \$9,642**

To promote and preserve Dixieland Jazz music.

**LOAVES AND FISHES FUND
FUND \$320,401**

To benefit programs run by liberal, reformed Protestant churches in Franklin and Hampshire counties that wed Christian faith and action.

**LOUPINSKI FAMILY MEMORIAL
FUND \$316,652**

To preserve open lands in the towns of Southwick, Westfield, Granville, and Agawam, MA, including the purchase of such lands or conservation easements thereon.

**DR. JOHN E. MCNALLY MEMORIAL
FUND \$48,432**

To support nonprofit organizations in the areas of education, human services, and/or health.

**L. JOHN SCHINELLI RENAL
ASSISTANCE FUND \$265,225**

To provide emergency financial assistance to renal patients and their families.

**SPRINGFIELD HOSPITAL NURSES
ALUMNI ASSOCIATION FUND
FUND \$72,359**

To support programs that improve the quality of life in western MA with emphasis on nursing education and needs of women and children.

**IDA AND ABRAM SUDRANN
MEMORIAL FUND \$246,954**

To support among social activist organizations.

**W. W. ARTSALWAYS CHARITABLE
FUND \$20,236**

To support children as they develop their artistic talent.

**RACHEL O. STORRS WARE YOUTH
CENTER, INC. FUND \$19,004**

To support youth activities in the Town of Ware.

**THE WOMEN'S FUND OF WESTERN
MASSACHUSETTS \$361,238**

To support programs that help women and girls.

EDUCATION FUNDS

Scholarship and interest-free funds help bring higher education within reach of those residents of the Pioneer Valley who might not otherwise be able to afford it. Through a competitive award process, expert community volunteers ensure that limited resources are given to those most deserving of assistance.

**AFRICAN AMERICAN ACHIEVEMENT
FUND \$18,818**

African American residents of Franklin, Hampden, and Hampshire counties who attend four-year colleges.

**ARRIGHI MEMORIAL SCHOLARSHIP
FUND \$66,987**

Residents of Greenfield.

**CHRISTINE BALCH MEMORIAL
SCHOLARSHIP FUND \$102,286**

Hampden County residents attending medical school.

**EDWARD J. BAYON MEMORIAL
SCHOLARSHIP FUND \$51,951**

Holyoke residents who are graduating seniors from Holyoke high schools studying civil engineering or a related field at a four-year college.

**LUTHER A. AND EVELYN L. BELDEN
MEMORIAL SCHOLARSHIP FUND
FUND \$182,817**

Graduating high school seniors who are residents of Hatfield or graduating seniors of Smith Academy.

**FLORENCE BLISH SCHOLARSHIP
FUND \$113,258**

Residents of Agawam to attend college.

**JOSEPH BONFITTO SCHOLARSHIP
FUND \$27,789**

Graduating seniors from Agawam High School studying creative design, advertising, or the arts.

**SHELLEY N. BOURQUE MEMORIAL
SCHOLARSHIP FUND \$31,221**

Graduating seniors from Belchertown High School.

**BARBARA HOLCOMB BRAEM
SCHOLARSHIP FUND \$23,319**

Graduating seniors from Westfield High School; preference for those pursuing degrees in a business related field.

**KEVIN BRESNAHAN MEMORIAL
FUND \$35,340**

Graduates of either Holyoke

Catholic High School or Holyoke High School who plan to further their education at the post-secondary level, or any trade or professional school beyond high school; with a preference for those pursuing a musical career, especially jazz or blues.

**RUTH L. BROCKLEBANK MEMORIAL
SCHOLARSHIP FUND \$222,019**

African-American graduates of Springfield high schools.

**CALEB L. BUTLER SCHOLARSHIP
FUND \$39,775**

Graduating high school seniors from Franklin, Hampden, or Hampshire Counties who are in the custody of the Department of Children and Families (DCF), with a preference for former or current residents of Hillcrest

**PERMELIA A. BUTTERFIELD
SCHOLARSHIP FUND \$106,349**

Orphan children, under 21 years of age, who are residents of Franklin County.

**CHARLES R. ALLAN AND JUDITH
V. CARLSON SCHOLARSHIP FUND
FUND \$227,102**

Graduating seniors from Springfield Central High School and Springfield High School of Science and Technology selected as the top scholars in physics.

**RAYMOND E. CARR SCHOLARSHIP
FUND \$986,416**

Students attending American International College, Elms College, Springfield College, Western New England University, or Westfield State University.

**STANLEY CIEJEK, SR. SCHOLARSHIP
FUND \$217,402**

Residents of Franklin, Hampden, and Hampshire counties.

**ERIC CLAYTON HOCKEY MEMORIAL
SCHOLARSHIP FUND
FUND \$43,935**

Graduating high school seniors from Easthampton, Holyoke, Southampton, and Westhampton; preference for those with ice hockey involvement.

JAMES W. COLGAN LOAN, BANK OF AMERICA, TRUSTEE \$4,984,792

Current Massachusetts residents who have resided in state for a minimum of five years.(Combine totals of Colgan Funds)

JAMES W. COLGAN LOAN, BANK OF AMERICA, TRUSTEE \$2,503,580

(Combine totals of Colgan Funds)

RONALD A. COPES SCHOLARSHIP FUND \$18,517

Graduating high school seniors from Springfield, MA or Hartford, CT who have a minimum GPA of 3.0, and who indicate participation in extracurricular activities.

LILIANA MARIE CORDES SCHOLARSHIP FUND \$38,967
Hampshire county residents studying music; preference for high school seniors that are residents of South Hadley.

LEE CRABTREE MEMORIAL SCHOLARSHIP FUND \$12,570
Graduates of Springfield public high schools pursuing music; preference for graduates of Springfield Central High School and Springfield High School of Science and Technology.

CAROL CRAIG SCHOLARSHIP FUND
To provide scholarships to residents of Hampden, Hampshire, or Franklin counties.

GEORGE AND THERESA CRETE SCHOLARSHIP FUND \$331,311
Residents of western MA.

WILLIAM J. DEAN AND MARY FITZSIMMONS DEAN SCHOLARSHIP FUND \$37,313
Graduates of William J. Dean

Technical High School in Holyoke.

WILLIAM A. AND VINNIE E. DEXTER ENDOWED SCHOLARSHIP FUND \$96,005

Graduating high school seniors in western MA.

JOHN DINAPOLI MEMORIAL SCHOLARSHIP FUND \$53,905
Hampden County high school seniors; preference for residents of Holyoke.

DINN BROTHERS STUDENT ATHLETE AWARD FUND \$61,384

One male and one female scholar athletes from western MA who have been chosen as Athletes of the Year by The Republican Newspaper.

LOUIS W. AND MARY S. DOHERTY SCHOLARSHIP FUND \$386,166
Residents of Hampden County.

A. DAVID DAVEY DUGGAN MEMORIAL SCHOLARSHIP FUND \$21,350

Graduating seniors from Holyoke high schools.

FIRST SERGEANT KEVIN DUPONT MEMORIAL SCHOLARSHIP FUND \$73,277
Graduates of Chicopee High School and Chicopee Comprehensive High School; preference for graduating seniors who demonstrate leadership qualities and/or community service. Given in memory of a fallen hero who served his country for over 30 years.

CARLOS B. ELLIS SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$187,320
Graduates of the Springfield High School of Commerce.

CRAIG M. EPSTEIN MEMORIAL SCHOLARSHIP FUND \$34,530
Graduating seniors from Longmeadow High School who participated in either football or ran track and field and who best exemplify the

high academic standards and the team ideals which best represent Crai

DIANA AND LEON FEFFER SCHOLARSHIP FUND \$519,815

Residents of Franklin, Hampden, and Hampshire counties.

ANN FERGUSON WOMEN AND GENDER STUDIES SCHOLARSHIP \$29,258

Undergraduate and graduate students pursuing degrees or certificates in women and gender studies at the University of Massachusetts-Amherst.

DR. JEFFREY A. FERST VALEDICTORIAN MEMORIAL SCHOLARSHIP FUND \$78,656

Valedictorian of Westfield High School.

RICHARD E. FIORE MEMORIAL SCHOLARSHIP FUND \$37,702

Residents of Southwick.

FIRST NATIONAL BANK AMHERST CENTENNIAL EDUCATION SCHOLARSHIP FUND \$45,340
Graduating seniors of Amherst Regional High School, Hopkins Academy, Northampton High School, Amherst College, Hampshire College, and the University of Massachusetts-Amherst.

FISHER FAMILY LOST ACRES SCHOLARSHIP FUND \$20,866
For students pursuing agriculture, horticulture, or related majors.

HERIBERTO FLORES SCHOLARSHIP FUND \$23,541
Springfield Technical Community College and Holyoke Community College graduates of Puerto Rican ancestry from Hampden or Hampshire counties who plan to attend MA institutions of higher education.

JOHN M. FLYNN FAMILY SCHOLARSHIP FUND \$499,613

For high school graduates living in the cities of Hampden or East Longmeadow at the time of their graduation from high school; with a preference for students who have demonstrated involvement in public service.

DEBORAH BRODEUR FOLEY MEMORIAL SCHOLARSHIP FUND \$16,066

Graduating seniors from Minnechaug Regional High School in Wilbraham pursuing nursing or an allied field.

FRANKLIN COUNTY EDUCATION FUND \$989,738

To provide scholarships for students from Franklin County, Massachusetts.

FUTURE SCHOLARS FUND \$68,361
Unrestricted scholarship support.

JEFFREY I. GLASER, M.D. MEMORIAL SCHOLARSHIP FUND \$11,264

Graduating high school seniors from Longmeadow High School with a GPA of 2.8 or higher, who have participated on the Longmeadow High School Swim Team, with a preference for students who have participated for three years or more or have held a leadership position on the swim team.

DONALD A. AND DOROTHY F. AXTELL GRANT SCHOLARSHIP FUND \$29,262
Protestant students from Hampshire County.

NICHOLAS G. GRASS SCHOLARSHIP FUND \$79,635
Athletes graduating from Holyoke High School who best exemplify the high academic and athletic ideals which Nicholas Grass represented.

KENNETH B. AND ADELIN J. GRAVES SCHOLARSHIP FUND \$490,774
Residents of Granby, MA.

HELEN HAMILTON SCHOLARSHIP FUND \$25,671

For residents of Franklin, Hampden, or Hampshire county pursuing degrees in Social Services, Housing Studies, Urban Design, and other related fields with a preference for students who have demonstrated a commitment to community service.

HELLESPONT SOCIETY SCHOLARSHIP FUND \$15,984

High school graduates who attend a two- or four-year college, and are persons of Greek descent, with preference given to descendants of past Hellestont Society members.

GERTRUDE AND WILLIAM C. HILL SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$187,184

Graduates of Springfield Central High School; preference for students majoring in liberal arts.

HORACE HILL SCHOLARSHIP FUND \$49,553

Children and grandchildren of the members of the Springfield Newspapers' 25-Year Club.

ELIZABETH M. HULLER SCHOLARSHIP FUND

Graduates of Central High School in Springfield, MA or its successor institution.

MARGARET J. HYLAND FUND, BANK OF AMERICA, TRUSTEE \$1,248,964

University of Massachusetts students who have been Holyoke residents for ten years or longer; preference for students of the Roman Catholic faith.

RICHARD W. AND FLORENCE B. IRWIN SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$900,804

Residents of Northampton attending law school.

FRANK W. JENDRYSIK, JR. MEMORIAL SCHOLARSHIP FUND \$17,999

Residents of Chicopee, Holyoke, and Springfield.

MARKUS J. JOHNSON MEMORIAL SCHOLARSHIP FUND \$18,785

Graduates of Springfield public high schools. Markus Johnson was the first Springfield resident to die while serving in Iraq.

ANTHONY AND MADELINE SAMPSON KAPINOS SCHOLARSHIP FUND \$897,385

Graduates of Chicopee High School.

VINCENT S. AND JANE A. KORZENIOWSKI MEMORIAL SCHOLARSHIP FUND \$21,243

Residents of Chicopee.

JAMES B. KRUMSIEK MEMORIAL FUND \$31,892

Graduating seniors from Cathedral High School and Longmeadow High School who are active in athletics and exhibit academic achievement.

FRED K. LANE SCHOLARSHIP FUND \$31,663

Graduating high school seniors who are past or current members (individual or family) or employees of the Orchards Golf Course in South Hadley or residents of South Hadley with a preference for a graduating senior who has played golf or a sport.

LATINO BREAKFAST CLUB SCHOLARSHIP FUND \$17,587

Graduating Latino high school seniors from Hampden County.

LATINO SCHOLARSHIP FUND \$68,197

Graduating Latino high school seniors from Hampden and Hampshire counties.

JACQUELINE A. LAVALLEE SCHOLARSHIP FUND

Graduates of Ware High School with high financial need who exhibit a strong work ethic as demonstrated by community service, employment, or academic effort.

JESSIE M. LAW SCHOLARSHIP FUND \$126,638

Graduates of Springfield Central High School.

EDWARD A. AND SHIRLEY B. LIVI SCHOLARSHIP FUND \$22,220

Residents of Franklin, Hampden, and Hampshire counties who are pursuing fine or performing arts beyond their college freshman year.

MACGEACHEY MINARIK SCHOLARSHIP FUND \$75,373

Students who have resided in Monson for two years; preference for graduates of Monson High School or Pathfinder Regional High School.

MACINTYRE FAMILY SCHOLARSHIP FUND \$533,598

Residents of Franklin, Hampden, and Hampshire counties.

STUART D. MACKEY SCHOLARSHIP FUND \$10,564

Graduates of East Longmeadow High School.

JOHN P. MAHONEY AND JAMES F. MAHONEY MEMORIAL SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$416,789

Residents of Northampton.

CAPTAIN JOHN MALONEY SCHOLARSHIP FUND \$47,872

Residents of Hampden County with at least one award to a graduating high school senior from Chicopee High School.

MARY ALBY MARKEL MEMORIAL SCHOLARSHIP FUND \$17,225

Graduating seniors from Springfield Central High School pursuing the sciences.

EDWARD C., MARY, AND PAUL MARTH SCHOLARSHIP FUND \$17,005

Graduating seniors from St. Mary's High School in Westfield pursuing nursing or an allied field.

MASSMUTUAL SCHOLARS FUND \$1,107,617

Graduating high school seniors from the city of Springfield, MA or the city of Enfield, CT interested in pursuing careers in financial services, business, or information technology.

CLARENCE H. MATTESON SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$163,742

Residents of Greenfield.

WILLIAM T. MAUNSELL MEMORIAL SCHOLARSHIP FUND \$14,727

Graduating seniors from Westfield High School, Westfield Vocational Technical High School, and St. Mary's High School in Westfield, MA who have average grades and are pursuing degrees in education, criminal justice, or nursing.

GEORGE H. MCDONNELL SCHOLARSHIP FUND \$53,443

South Hadley residents who are studying civil or environmental engineering at a four-year college.

GEORGE H. AND MARGARET B. MCDONNELL FAMILY SCHOLARSHIP FUND \$19,822

Graduates of Holyoke Catholic High School pursuing a career in social work or an allied field; in memory of Margaret Mary (Peggy) McDonnell.

GEORGE AND ISABELLE MCGRATH SCHOLARSHIP FUND \$2,038

Graduates of Ware High School who have excelled athletically and academically.

NATE MCKINNEY MEMORIAL SCHOLARSHIP FUND \$88,158

Graduating seniors from Gateway Regional High School who excel academically and have an interest in music, science, or athletics.

MILLER FUND \$39,330

Residents of the Shelburne Falls Fire District in Franklin County.

SARAH AND ABRAHAM MILSTEIN SCHOLARSHIP FUND \$40,340
Valedictorian and salutatorian of Westfield High School.

THEODORE P. (TED) MINOR MEMORIAL SCHOLARSHIP FUND \$13,622
Graduating seniors from Chicopee high schools.

ELEANOR M. MORRISSEY SCHOLARSHIP FUND \$22,326
Graduating high school seniors from Berkshire, Franklin, Hampden, and Hampshire counties pursuing a career in nursing.

MT. SUGARLOAF LODGE MEMORIAL FUND \$24,151
Graduates of Frontier Regional High School in South Deerfield.

NATIONAL ASSOC. OF INSURANCE AND FINANCIAL ADVISORS SCHOLARSHIP FUND \$45,899
Graduating high school seniors from Berkshire, Franklin, Hampden, and Hampshire counties who have had a parent die or have a parent receiving Social Security disability benefits.

JAMES Z. NAURISON SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$9,202,168
Residents of Berkshire, Franklin, Hampden, and Hampshire counties, MA and the towns of Enfield and Suffield, CT.

WILLIAM J. (BILL) AND LORETTA M. O'NEIL SCHOLARSHIP FUND \$14,341
Residents from western MA pursuing English, journalism, or a related field.

VICTOR, MARGARET, AND JOSEPH VICTOR PAIER SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$269,644
Residents of West Springfield.

KAREN PANACCIONE AND KRISTINE JOHNSON MEMORIAL SCHOLARSHIP FUND \$32,492
Residents of Hampden,

Hampshire or Franklin counties pursuing nursing.

FREDERICK W. PORTER SCHOLARSHIP FUND \$14,383
Resident of Greenfield or a graduate of Greenfield High School.

GERTRUDE G. RAPP SCHOLARSHIP FUND \$30,317
Graduates of Gateway Regional School District who reside in the geographic areas serviced by the district. The towns served are Blandford, Chester, Huntington, Middlefield, Montgomery, Russell, and Worthington.

ANTHONY A. RENAUD MEMORIAL SCHOLARSHIP FUND \$24,397
Graduating high school seniors from Hampden County or students enrolled at Mount Carmel School in Springfield who have had a parent die; preference for those who have had a parent die from heart disease.

JACOB AND CELIA RICHMOND FUND \$56,173
Residents of Hampden County attending law school.

KIMBER RICHTER FAMILY SCHOLARSHIP FUND \$11,376
Graduating high school seniors of the Baha'i faith from western MA.

RINTOUL FAMILY FUND \$120,695
For students from Hampden or Hampshire counties attending a two- or four-year college, studying agriculture or other related majors.

KENNETH C. ROBINSON/SPRINGFIELD ACCOUNTANTS SCHOLARSHIP FUND \$77,019
MA and Hartford County, CT residents who have completed their college sophomore year pursuing accounting or finance.

JEAN D. ROGÉR MEMORIAL FUND \$80,132
Graduates of Longmeadow

High School who display the qualities of character for which Jean D. Rogér is remembered.

CHRISTINE MITUS ROSE MEMORIAL SCHOLARSHIP FUND \$37,117
Students who have had a parent die; preference for those who have had a parent die from cancer.

ROTARY CLUB OF HOLYOKE SCHOLARSHIP FUND
Residents of Holyoke, South Hadley, and Granby, MA pursuing undergraduate studies.

C. KENNETH SANDERSON SCHOLARSHIP FUND \$120,833
Graduating senior from Monson High School ranked in the top seven of the senior class.

SEELIG FAMILY SCHOLARSHIP FUND
Scholarships for graduates of Springfield's Putnam Vocational High School studying STEM (Science, Technology, Engineering, Mathematics).

SEPTEMBER 11TH REMEMBRANCE SCHOLARSHIP FUND \$60,414
Graduating high school seniors who reside in Berkshire, Franklin, Hampden, and Hampshire counties.

DR. JOHN V. SHEA, JR. SCHOLARSHIP FUND \$5,976
Graduates of Springfield high schools.

PHILIP W. SHERIDAN-TIGHE AND BOND SCHOLARSHIP FUND \$59,017
Graduating high school seniors from Hampden and Hampshire counties who will be studying civil engineering or a related field at a four-year college; established to honor the leadership of Philip W. Sheridan at Tighe and Bond.

CONNIE CELESTE SHERMAN MEMORIAL SCHOLARSHIP FUND \$12,818
Established by her family for students from Hampden County.

JAMES L. SHRIVER SCHOLARSHIP FUND \$12,100
Students from western MA pursuing technical careers.

MICHAEL A. SMIAROWSKI MEMORIAL SCHOLARSHIP FUND \$236,389
Graduating seniors from Turners Falls High School. One award to the class salutatorian and one to a student with average grades who contributes to the community and has good character and judgment.

SPRINGFIELD TEACHERS CLUB SCHOLARSHIP FUND \$163,234
Residents of Franklin, Hampden, and Hampshire counties who are graduates of Springfield public high schools.

STEIGER FAMILY SCHOLARSHIP FUND \$437,802
Graduates of Springfield Central High School.

MARGRIT H. SUTTON-ANNEN STUDENT LOAN FUND, BANK OF AMERICA, TRUSTEE \$697,907
Students enrolled full time in two- or four-year colleges; preference to those of Swiss descent.

MARGRIT H. SUTTON-ANNEN STUDENT LOAN FUND \$140,512

LUCIUS H. TARBELL AND DOROTHY J. TARBELL SCHOLARSHIP FUND \$77,984
Students attending Western New England University.

EMANUEL S. TESORO AND MARIAN T. TESORO SCHOLARSHIP FUND \$11,069
Residents of East Longmeadow.

RICK THORPE 9/11 MEMORIAL SCHOLARSHIP FUND \$107,804

One female and one male graduating senior from Minnechaug Regional High School who have demonstrated achievement in athletics, academics, and service; whose leadership had a positive impact in the school.

LENA A. TUCKER SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$250,463

Graduates of the High School of Commerce and Putnam Vocational Technical High School in Springfield.

JOHN AND EVELYN TURNBULL NURSING EDUCATION FUND

Residents of Franklin, Hampden, and Hampshire counties pursuing a Baccalaureate or Master's degree in Nursing.

UNITED WAY OF HOLYOKE, SOUTH HADLEY, AND GRANBY, INC./YWCA SCHOLARSHIP FUND FOR WOMEN \$58,504

Women, age 18 or older, from Granby, Holyoke, and South Hadley, MA.

URBAN LEAGUE OF SPRINGFIELD SCHOLARSHIP FUND \$500,326

For African American residents of Springfield.

PAUL J. VERONESI MEMORIAL SCHOLARSHIP FUND \$53,545

One male and one female graduating senior from Agawam High School who excel in basketball.

VIRGINILLO-FALVO SCHOLARSHIP FUND \$383,635

For needy youth of western Massachusetts to attend college.

MARY VOLANAKIS MEMORIAL SCHOLARSHIP FUND \$100,567

Students of the Greek Orthodox faith, preference for members of St. George Greek Orthodox Cathedral in Springfield.

RUTH WALLACE MEMORIAL SCHOLARSHIP FUND \$137,821

Graduating seniors from Longmeadow High School who participated in a learning disabled program.

WILBUR H.H. WARD EDUCATION FUND \$357,968

For the purposes of providing assistance to individuals from Hampshire County attending UMass, Amherst with preference given to residents of the Town of Amherst.

CHARLES F. WARNER SCHOLARSHIP FUND \$25,087

Residents of Springfield.

WESTBANK-JANE M. KNAPP SCHOLARSHIP FUND \$17,377

Graduates of MacDuffie School in Granby, MA.

WESTBANK-STANLEY F. OSOWSKI SCHOLARSHIP FUND \$17,368

Graduates of Westfield High School.

WESTFEST SCHOLARSHIP FUND \$11,598

Hampden County residents pursuing degrees in the arts; preference to residents of Westfield.

ESTHER J. AND LEWIS W. WHITING FUND \$14,356

Graduates of Springfield Central High School pursuing medicine or natural science, and support for the Washington Street School Library.

WILCOX-WARE SCHOLARSHIP FUND, BANK OF AMERICA, TRUSTEE \$398,928

Graduating seniors residing in Buckland, Colrain, or Shelburne.

PROFESSIONAL WOMEN'S CHAMBER OF COMMERCE OF WESTERN MASS., INC. SCHOLARSHIP FUND FOR WOMEN \$68,501

Women, age 25 or older, from greater Springfield who have had a break in their education

wishing to return to the work force attending accredited colleges

DONOR DESIGNATED FUNDS

Designated funds are permanent endowments, providing annual distributions to those nonprofits designated by the donor while still attempting to preserve the principal of the fund.

ALBERT S. AND ANNA E. ADAMS FUND, BANK OF AMERICA, TRUSTEE \$700,121

To benefit St. John's Lutheran Church, Westfield and to provide scholarships for graduates of Westfield High School.

DAVID BIGDA MEMORIAL FUND \$9,917

Annual distributions made in equal amounts to WFCR Foundation, Inc. and the WGBH Foundation for the use of WGBY for programming.

ELISE B. AND EARL BRADWAY CHARITABLE FUND \$1,881,361

To benefit designated charities.

DAVID N. BUTTERWORTH TRUST FUND \$166,382

To benefit the Holland Congregational Church and other church societies in the Town of Holland that have a regular house of worship and service therein with resident clergy.

CAPACITY FUND \$800,000

To build the capacity of the Foundation and/or Foundation programs that build the capacity of the nonprofits we serve.

PHIL AND CECILIE CARDONE SCHOLARSHIP FUND \$10,111

To provide scholarships for students at the Wilbraham

& Monson Academy in Wilbraham, MA.

GEORGE E. AND JANET P. CARTIER FAMILY SCHOLARSHIP FUND \$19,696

For scholarship assistance for students attending St. Michael's Academy.

CASS FAMILY FUND \$46,318

To support charities in the donors' areas of interest, particularly the Mittineague Congregational Church in West Springfield, and scholarships for high school graduates from Springfield, Vermont.

CHRISTENSON LILLY LIBRARY FUND \$19,165

To support the Lilly Library Association of Florence, MA.

CHURCH STREET HOME FUND

Supports the Interfaith Council of Franklin County's Housing Assistance Fund and Franklin Home Care's programs and activities for Franklin County senior centers and the Home Repair Program for the elderly.

EDWARD M. CLARK DICTIONARY FUND \$10,327

For the purchase and distribution of dictionaries to students in the public schools in the city of Springfield, MA.

ARTHUR H. AND BARBARA M. CLARKE FUND \$367,565

To support Baystate Medical Center; the Springfield Library and Museums Association; Western New England University; YMCA of Greater Springfield; and Springfield Symphony Orchestra.

CHARLES E. COLEMAN AND ELIZABETH H. COLEMAN SCHOLARSHIP FUND \$284,818

To support scholarship awards for students who are residents of Franklin, Hampden, and Hampshire counties to attend Mount Holyoke College.

**JOHN J. CONWAY PINE GROVE
CEMETERY ENDOWMENT FUND
\$20,352**

To support the Pine Grove Cemetery in Conway.

**VICTORIA CYRAN AND ANN SZETELA
ST. STANISLAUS SCHOOL ALUMNI
SCHOLARSHIP FUND \$257,737**

To provide higher education scholarships for graduates of St. Stanislaus School.

**NEIL G. DABOUL FUND FOR THE
SPRINGFIELD BOYS AND GIRLS CLUB
\$29,253**

To provide ongoing financial support for the Springfield Boys and Girls Club.

**PAUL AND DORIS DAVIS CHARITABLE
ENDOWMENT FUND \$79,105**

To benefit organizations in the donors' areas of interest.

**SANDRA EAGLETON SCHOLARSHIP
FUND \$45,366**

Awarded on an annual rotating basis to students at Bay Path College, Holyoke Community College, and Springfield College.

**MAURY FERRITER SCHOLARSHIP
FUND \$18,990**

Graduates of Holyoke Catholic High School or students attending Amherst College or Georgetown Law School.

**J. G. FERST MEMORIAL FUND
\$14,167**

To benefit organizations in the donors' areas of interest.

**FOOD BANK OF WESTERN
MASSACHUSETTS ENDOWMENT
FUND \$1,051,083**

To support the operating expenses of The Food Bank.

**BILLIE FOSTER AND BERTHA
WEINBERG MEMORIAL
SCHOLARSHIP FUND \$12,991**

To provide scholarships for students at the Holyoke Community College Foundation, who have participated in The Care Center program.

**GEORGE A. GIROUX FUND
\$12,208**

To support the Visiting Nurse Association and Hospice of Western New England; Arise, Inc.; Community of Feeding Hills Grange; and Camp Norwich.

**DANIEL STEPHEN GOLDSTEIN FUND
FOR ARTS IN NORTHAMPTON HIGH
SCHOOL \$23,981**

To bring art programs to Northampton High School.

**GREATER SPRINGFIELD KIDNEY
PATIENT ENDOWMENT FUND**

To support the L. John Schinelli Renal Assistance Fund, providing assistance to local renal patients and their families.

**H. GRINSPOON AND D. TRODERMAN
FUND FOR THE SPRINGFIELD**

**LIBRARY AND MUSEUMS
ASSOCIATION \$84,666**

To support the ongoing work of the organization.

**RUTH M. AND JESSE G. HAHER, JR.
FUND \$118,472**

To support Ronald McDonald House of Springfield, MA, Inc.; Richard Salter Storrs Library Association; Visiting Nurse Association and Hospice of Western New England; First Church of Christ in Longmeadow.

**LEONARD DWIGHT HILLS FUND
\$9,952**

To assist poor people living in or near the Town of Amherst.

**HUNTINGTON EVANGELICAL CHURCH
FUND \$41,421**

To provide support to the Huntington Evangelical Church.

**VIRGINIA AND EARL JAHN FUND
\$2,610,483**

To support nonprofit organizations in the donor's areas of interest.

**BEATRICE KELLY FUND FOR THE
SPRINGFIELD BOYS' CLUB, INC.
\$78,679**

To support the Springfield Boys and Girls Club, Inc.

**RUTH FREEDMAN LEAVITT TEACHERS
FUND \$8,696**

To benefit substitute teachers in the Longmeadow school district.

**LOOMIS LAKESIDE AT REEDS
LANDING FUND \$10,557**

To benefit this organization.

**FRANK E. LUCCHESI MEMORIAL
FUND \$12,636**

To support the Happy Valley Guitar Orchestra.

**MICHAEL T. AND MARY T. LYNCH
FUND FOR THE ROMAN CATHOLIC
DIOCESE OF SPRINGFIELD
\$12,228**

To support the Catholic Diocese of Springfield.

**REVEREND THOMAS A. MCGOVERN
FUND \$33,839**

To provide scholarships to students at St. Michael's Academy, formerly Holy Name of Jesus School, Springfield.

**PAUL H. AND MARY-LOUISE
MEHRTENS CHARITABLE FUND**

To benefit the Springfield Museums and to support charities selected by the Distribution Committee.

MUSICORDA FUND \$27,536

To advance and promote chamber music through teaching and performance.

**NORTHAMPTON BIKES ENDOWMENT
FUND \$57,980**

To support acquisition and/or capital support of bicycle and multi-use trails in the City of Northampton.

**NORTHAMPTON CONSERVATION
ENDOWMENT FUND \$224,875**

To support land conservation in the City of Northampton.

O. I. STERN FUND \$61,364

To benefit the Education Fund at the Friends Committee on National Legislation.

**MARGARET E. O'DONNELL AND
AGNES K. O'DONNELL CHARITABLE
FUND \$2,597,989**

To benefit designated charities and to provide scholarship support.

**ROBERT D. AND MARIE L. O'MALLEY
CHARITABLE FUND \$54,550**

To benefit St. Paul's Episcopal Church in Holyoke; Community United Way of Pioneer Valley, Inc.; Boys & Girls Club of Greater Holyoke; and South Hadley Historical Society.

**PICKNELLY FAMILY CHARITABLE
FUND \$164,787**

To support a number of charitable organizations.

**A CHARITABLE FUND IN MEMORY
OF MR. AND MRS. ARTHUR RYAN
\$24,816**

To support Providence Ministries for the Needy, Dakin Pioneer Valley Humane Society, and Gaylord Memorial Library Association.

SIMPLE BLESSINGS FUND \$47,219

Awarded on an annual rotating basis to Yale Divinity School, Andover-Newton Theological Seminary, and Bangor Theological Seminary to provide educational debt retirement to needy students.

**ST. JOHN'S LUTHERAN CHURCH
FUND \$82,573**

To further the mission of this Westfield church.

**ST. MARK MISSION CHURCH
ENDOWMENT FUND \$21,436**

To support St. Mark Mission Church in Conway.

**PEGGY AND DAVID STARR
SPRINGFIELD MUSEUMS
ENDOWMENT FUND \$56,977**

To support the Springfield Museums.

**PEGGY AND DAVID STARR
SPRINGFIELD SYMPHONY
ENDOWMENT FUND \$301,966**
To support the Springfield
Symphony Orchestra.

**PEGGY AND DAVID STARR WFCR
ENDOWMENT FUND \$275,392**
To support the WFCR radio
station.

**PEGGY AND DAVID STARR WGBY
ENDOWMENT FUND \$56,977**
To support the WGBY
television station.

**MARGARET L. STEIGER MEMORIAL
SCHOLARSHIP FUND \$116,314**
For students attending
Wilbraham & Monson
Academy. Established by
the Albert Steiger Memorial
Fund, Inc. in honor of the
many years Margaret L.
Steiger taught at Wilbraham &
Monson Academy.

**ROBERT E. STOWE AND CYNTHIA
STOWE SCHOLARSHIP FUND
\$277,425**
For scholarships to women
in Franklin County for
whom college attendance
is otherwise unlikely who
are attending Greenfield
Community College.

**IDA AND ABRAM SUDRANN
MEMORIAL FUND \$119,025**
To Massachusetts General
Hospital in Boston and to
the Endowment for students
in English for Research and
Travel established at Mt.
Holyoke College.

**BRIAN W. SULLIVAN MEMORIAL
SCHOLARSHIP FUND \$679,373**
For scholarships for Cathedral
High School students.

**MARY E. TUTTLE FUND
\$248,952**
To support All Saints Episcopal
Church, South Hadley,
MA; WGBH Educational
Foundation; Community United
Way of Pioneer Valley, Inc.;
Easter Seals of Massachusetts;
Shriners Hospital for Children,

Springfield, MA; Girls Inc.

**URBAN LEAGUE OF SPRINGFIELD
ENDOWMENT FUND \$480,558**
To provide annual operating
support to the organization in
perpetuity.

VENTI FAMILY FUND \$20,159
To support the Springfield
Museums.
**DR. MARY G. WILE EDUCATION
ENDOWMENT FUND \$24,058**
To support programs for young
children at the Emily Partyka
building of the Chicopee
Public Library.

WILLIAMSON FAMILY FUND
To support the South Hadley
Historical Society, Inc., for
the exclusive use of the
Sycamores.

DONOR ADVISED FUNDS

Donor advised funds offer
donors the opportunity
to remain involved
in grantmaking by
recommending distributions
of either income or principal.
Gifts to advised funds make
it possible for a donor to give
appreciated stock, mutual
fund shares, or real estate and
still support multiple charities,
some of which may not be
able to accept such assets.
They also allow a donor to
take a charitable income tax
deduction without making a
final determination as to the
ultimate charitable recipients.

**DONALD W. ABEL CHARITABLE FUND
\$12,364**
To benefit a variety of
community programs.

**ADULT BASIC EDUCATION FUND
\$13,067**
For Adult Basic Education
students (including beginning
literacy, GED, or ESL) in
the four counties of western
MA pursuing their further

educational goals at a
college, trade, or professional
school.

**AMHERST CLUB COMMUNITY
ENDOWMENT FUND \$37,164**
To benefit charities in Amherst.

**ANONYMOUS #3 FUND
\$10,888**
**ANONYMOUS #5 FUND
\$122,943**

**ANONYMOUS #7 FUND
\$16,493**

**ANONYMOUS #8 FUND
\$7,566**

**ANONYMOUS #9 FUND
\$17,203**

**ANONYMOUS #10 FUND
\$17,169**

**ANONYMOUS #11 FUND
\$32,785**

**ANONYMOUS #12 FUND
\$10,399**

**ANONYMOUS #13 FUND
\$40,102**

**ANONYMOUS #15 FUND
\$127,216**

ANONYMOUS FUND #16

**ANONYMOUS
\$99,555**
To support St. John's Episcopal
Church, Northampton, MA.

**ARMSTRONG CHARITABLE FUND
\$88,813**

ART ANGELS FUND
An anonymous group of
women artists/art lovers in
the Pioneer Valley pooled
financial resources to support
local art projects that deepen
and enrich the artistic life of
the region.

AUSTIN FAMILY FUND \$29,408

**BARKER FAMILY CHARITABLE FUND
\$91,943**
To benefit education and
social services, particularly in
Franklin County.

**DANA R. BARROWS FAMILY FUND
\$10,138**

BAYBERRY FUND

**BEATTY-ROIG CHARITABLE FUND
\$37,910**
To support charities in the
donors' areas of interest,
particularly in Franklin County.

**GEORGE AND DORIS BEAUREGARD
CHARITABLE FUND \$49,105**
To support charitable
activities with preference to
organizations in the Holyoke
area.

**THE BEVERIDGE FAMILY
FOUNDATION, INC. FUND
\$18,297**

**S. PRESTLEY AND HELEN BLAKE
FUND \$4,302,026**

**BRIANNA FUND FOR CHILDREN
WITH PHYSICAL DISABILITIES
\$46,985**

To support charities that
aid children with physical
disabilities.

**PRISCILLA AND C. W. CARTER FUND
\$29,470**

**LIZZIE CHANDLER MEMORIAL FUND
\$31,255**
To support recreational
and unmet needs of
developmentally disabled
persons.

CHARTER OAK FUND
To support the charitable goals
of Charter Oak Insurance and
Financial Services Company.

**CHEREWATTI FAMILY FOUNDATION
FUND**
To support charities in the
donors' areas of interest, in
particular youth programs.

REV. KENNETH A. CHILDS MEMORIAL FUND \$16,787 To support economic justice, education, and environmental awareness.	DOHERTY FAMILY CHARITABLE FUND MICHAEL T. DOWNEY MEMORIAL FUND \$51,816 To support charitable interests of the donors, especially Cathedral High School.	and/or Franklin Counties with at least some portion serving boys/young men; with a preference for independent living programs.	HAMPDEN PAPERS, INC. CHARITABLE FUND \$13,832 Created by the Fowler family in Holyoke as part of the giving of Hampden Papers, Inc.
COLACCINO FAMILY CHARITABLE FOUNDATION \$246,298	FIRST SERGEANT KEVIN A. DUPONT LEADERSHIP FUND \$11,608 To support leadership education programs at the First Sergeant Kevin A. Dupont Memorial Middle School. Given in memory of a fallen hero who served his country for over 30 years.	THE FUND THAT J.A.C.K. BUILT \$16,312 To support organizations that benefit women and children.	HAMPDEN PAPERS EMPLOYEES' CHARITABLE FUND \$20,182 To support the charitable interests of the employees of Hampden Papers, Inc.
DABOUL FAMILY CHARITABLE TRUST	 EDDY FAMILY FUND \$39,521	GAEAN FUND \$185,373 J. GUY AND GERALDINE F. GAULIN CHARITABLE FUND \$36,218	TOM AND JANE HAZEN CHARITABLE FUND \$20,572
EVANGELINE ROYALL DARITY MEMORIAL STUDENT SUPPORT FUND \$14,988 African American students attending Mount Holyoke College, Smith College, or the University of Massachusetts- Amherst.	 EQUITY FOR LIFE, LLC CHARITABLE FUND \$1,257	GEM FUND \$23,596 GIVING FORWARD FUND \$71,804	KURT AND DOROTHY HERTZFELD CHARITABLE FUND \$10,045
DASCO FAMILY FUND \$70,764	 SCOTTIE AND KENT FAERBER CHARITABLE FUND \$12,316	LILA TEICH GOLD CHARITABLE FUND \$81,409 To advance community projects in life preparation and humanitarian appreciation.	HILLTOWN TRUST FUND \$20,049
ROBYN AND JOHN DAVIS CHARITABLE FUND \$897,200	 ANDRE AND KARIN FAFARD CHARITABLE FUND \$78,715	 GRAIS-GREENBERG FUND	THOMAS HOLDER MEMORIAL FIDDLE SCHOLARSHIP FUND \$29,730 For promising young fiddlers and violinists who wish to further their training.
STEPHEN A. DAVIS CHARITABLE FUND	 MAURICE J. AND MARGARET M. FERRITER CHARITABLE FUND \$38,150	GREENHAWK CHARITABLE FUND \$34,826	HOLYOKE ST. PATRICK'S PARADE PAST GRAND MARSHAL'S FUND \$25,895 In support of the Holyoke St. Patrick's Day Parade.
DENNIS FAMILY FUND	 ALBERT AND AMELIA FERST CHARITABLE FUND \$256,335 To support Westfield community projects and programs in the donors' areas of interest.	ALFRED L. AND SALLY GRIGGS FUND \$15,565 To provide a permanent mechanism to realize the donors' charitable objectives.	CHARLES AND MARY HOUGH CHARITABLE FUND \$76,519 To honor the lives of Charles and Mary Hough through the support of charitable causes.
DEROSE FAMILY CHARITABLE FUND \$21,562 To assist charitable interests and causes, primarily in Hampshire County.	 FIRST TRACKS FUND	HAROLD GRINSPOON AND DIANE TRODERMAN FUND \$49,257 To address the region's most pressing needs and to promote tzedakah (charity and justice).	J. LEWIS ENDOWMENT FUND \$1,154
DIETZ & COMPANY ARCHITECTS FUND	 FOR THE LOVE OF NATURE FOX FUND \$27,821	GROBMAN AND BOLLINGER FAMILY FUND \$13,011 For social change and arts funding.	RAYMOND AND JOAN JACKSON FUND \$2,804
DILL FAMILY FUND To support activities in the donors' areas of interest, particularly education and youth development.	 FRED'S FUND \$274,264	GROUNDWATER FUND	JAERNA FUND
JOHN DINAPOLI MEMORIAL CHARITABLE FUND \$22,719 To support charities recommended by the DiNapoli Memorial Committee.	 NORMA, JERRY, GLADYS, AND HENRY FRIEDMAN CHARITABLE FUND To fund organizations or projects that give voice to marginalized people.	LESTER AND ROBERTA HALPERN FUND \$8,504 To assist a number of charitable interests and causes, primarily in Hampden County.	JENSEN FAMILY CHARITABLE FUND \$368,125
DINKELAKER-DONNELLY FAMILY FUND \$9,979	 FUND FOR ADOLESCENT LEARNING AND INDEPENDENT LIVING \$96,619 To support programs that promote learning for adolescents in Hampshire	FRAN, MARY, AND KEVIN HAMEL CHARITABLE FUND \$15,336	JUGOSUS FUND \$69,188
GEORGE AND MICHELE DITOMASSI CHARITABLE FUND \$17,965			KEADY FUND \$167,919 To further the charitable interests of George and Jackie Keady.
DNG FAMILY FUND			KEISER FAMILY CHARITABLE FUND \$16,464 ED AND ELEANOR KLEPACKI CHARITABLE FUND \$19,856

**JAMES AND HELEN KRUMSIEK
FAMILY CHARITABLE FUND \$4,538**

**ELI KWARTLER AND BARBARA
BENDA JENKINS CHARITABLE FUND
\$45,273**

To support the Literacy Project,
Inc. and the Community
Adolescent Resource and
Education Center, Inc.

**CAROL AND NOEL LEARY
CHARITABLE FUND \$13,371**

**ADRIAN AND VIRGINIA LEVSKY
FAMILY FUND \$36,254**

**DR. ANTHONY P. LOVELL MEMORIAL
FUND \$62,913**

**BETSY AND LARRY LUNDY
CHARITABLE FUND \$10,155**

**GEOFFREY LYNN MEMORIAL FUND
\$243,942**

To provide supplemental
educational opportunities for
gifted students.

**MANCINONE FAMILY CHARITABLE
FUND \$29,348**

**MARKHAM-NATHAN FUND FOR
SOCIAL JUSTICE \$23,131**

To serve grassroots social
justice and peace groups in
western Massachusetts.

**MAZEINE FAMILY CHARITABLE FUND
\$17,935**

**CHRIS AND LINDA MCINERNEY
CHARITABLE FUND \$27,190**

THE MESCA FUND \$16,590

METTA FUND \$36,589

**MEYERS BROTHERS KALICKA, P.C.
CHARITABLE FUND \$18,059**

**RICHARD S. MILSTEIN, ESQ.
CHARITABLE FUND \$10,397**

**LUBOV BLUMIN MIRSKY FUND
\$50,259**

To support the donor's
charitable interests, including
helping to fund camper
scholarships and staff

education, development,
and support at Farm and
Wilderness, Inc.

**WILLIAM AND SUSAN MONKS FUND
FOR THE ARTS \$68,040**

For the support of the arts and
culture of western MA and CT.

**MORIARTY AND PRIMACK
CHARITABLE FUND \$6,031
RICHARD J. MORIARTY CHARITABLE
FUND \$220,395**

To support the charities of
interest to Rick Moriarty,
especially for programs
focused on ocular melanoma.

**JEANNE MORRILL MEMORIAL FUND
MORSE FUND \$948,892**
To advance Hampshire County
initiatives.

**ROBYN NEWHOUSE
CHARITABLE FUND**

**NORTHAMPTON MUSIC FUND
\$15,218**
To support music education in
Hampshire County.

**NORTHAMPTON OPEN SPACE AND
BICYCLE PROJECTS FUND \$12,510**
To support open space,
conservation, recreation, and
park land acquisition for the
City of Northampton.

NOVAK FAMILY CHARITABLE FUND

**WILLIAM R. O'CONNELL MEMORIAL
FUND \$46,769**

**JOSEPH F. JR. AND EMILY L.
PARTYKA FUND \$11,449**
To benefit the College of Our
Lady of the Elms and other
projects.

**JOHN AND LYNNE PARSONS FUND
\$10,428**

PEARSON FAMILY TRUST \$342,583

**RAIPHER D. PELLEGRINO
ENTREPRENEURIAL FUND \$34,859**
To support entrepreneurial
endeavors by individuals,
not-for-profits, and for-profits in
western MA.

**PERSONAL/PLANETARY
HEALING FUND**
To awaken and align personal
and planetary healing.

**ARTHUR H. PETLOCK FUND
\$22,879**

**THE PHOENIX FUND
MARY F. PICKNELLY CHILDREN'S
EMERGENCY FUND \$129,816**
To meet the needs of school-
age children in the Springfield
public schools which, because
of emergency circumstances or
the unavailability of services
from other existing programs,
are not being met.

**MARY JEAN AND MARIEL
PICKNELLY FUND**

**PETER AND MELISSA PICKNELLY
CHARITABLE FUND \$94,664**

**RAYMOND F. PIECZARKA FAMILY
FUND \$22,238**

**PILLARD-GONZALEZ FAMILY
CHARITABLE FUND \$25,208**

**JOHANNA AND THOMAS PLAUT
FUND \$11,367**

**LEWIS M. AND SALLY D. POPPER
FUND \$73,617**

**BETTY RAE AND MARTIN J. POPPO
CHARITABLE FUND \$58,671**
To advance programs,
particularly those focusing on
women and children.

**JOHN D. POWERS MEMORIAL FUND
\$57,431**
To benefit charitable causes in
the donors' areas of interest,
particularly the youth of
greater Springfield.

**QUINN FAMILY CHARITABLE FUND
\$15,615**

**READING SUCCESS BY 4TH GRADE
FUND \$609,711**
To support the work of the
Reading Success by 4th
Grade Collaborative.

**RED FOX FUND
PAUL REDSTONE CHARITABLE FUND
\$24,342**

**REGENSBURGER FAMILY FUND
\$18,514**

REILLY COONEY CHARITABLE FUND

**THE REPUBLICAN NEWSPAPER-IN-
EDUCATION FUND \$23,415**

**STARR FAMILY/AMHERST
CHARITABLE FUND**
To further the charitable
objectives of the donors.

THE ROLLINGS FAMILY FUND

**MICHAEL HILLEL ROTHMAN
MEMORIAL FUND \$44,501**
To support the interests of
the donors in programs in
music and the visual arts in
Hampshire County.

**ROBERT AND VIRGINIA RUSSELL
CHARITABLE FUND \$14,486**

**SAIGE REISLER MEMORIAL FUND
\$14,896**

SAMUELS FAMILY FUND

**DIETRICH AND JULIE SCHLOBOHM
ARCADIA WILDLIFE SANCTUARY
FUND \$80,444**

**LAWRENCE V. AND DOROTHY A.
SCHMITT MEMORIAL FRIENDSHIP
FUND \$173,697**
To benefit children in western
MA, particularly those
interested in developing their
artistic ability.

**MARTIN AND MARGARET
SCHOENEMANN FAMILY FUND
LOIS AND TOM SCHWAB FUND
\$13,707**

SEPTEMBER FUND

**BETTY SEXTON FAMILY
INVOLVEMENT IN LITERACY FUND**
To support family involvement
in literacy through the
Springfield public schools.

TARA SHEEHAN MEMORIAL FUND
\$72,414

To support charities working to help people with eating disorders.

DAVID SIGELMAN MEMORIAL FUND
\$17,838

To continue Dr. Sigelman's efforts to benefit communities both local and global.

SIS CHARITABLE FUND \$228,835

For charitable causes throughout western MA.

SIDNEY F. SMITH TOY FUND
\$41,893

To provide gifts for needy children during the holiday season.

PATRICIA AND RAYMOND SMYKE FUND \$13,039

To support charitable activities important to the donor and his family, particularly the prevention of the creation of refugees and refugee movements in developing countries, and to improve the lives of refugees.

MARY ANN AND RICHARD SPENCER II FUND

PEGGY AND DAVID STARR FUND
\$171,990

STEBBINS FAMILY CHARITABLE FUND
\$10,233

RICHARD A. STEBBINS FOUNDERS FUND \$186,022

For grants to honor Richard A. Stebbins and the founders of the Community Foundation.

SUDAN AID FUND \$17,569

To sustain humanitarian operations in Sudan.

ALLISON AND JEFF SULLIVAN FAMILY FUND

SV AND JEG FUND \$28,286

LISA TATE FUND

TCH FUND \$45,324

THEOBALD FAMILY FUND

TOPAL FAMILY FUND

THE TUOHEY FAMILY FUND

TAITETSU, ALICE, MARK, AND MEGUMI UNNO CHARITABLE FUND
\$39,779

VALLEY DISTRICT DENTAL WOMEN'S CHARITABLE FUND \$132,814

CARLOS VEGA FUND FOR SOCIAL JUSTICE AND COMMUNITY SERVICE
\$44,480

To support social justice and community service work in the Holyoke area.

DELORES AND ROBERT VIARENGO CHARITABLE FUND \$11,858

RICHARD E. F. AND SANDRA C. WALLIS CHARITABLE FUND

WARM THE CHILDREN FUND
\$41,028

To provide warm winter clothes for needy Franklin County children.

WINN FARLOW FUND \$11,561

THE WISTERIA FUND \$479,438

SALLY AND STEPHEN WITTENBERG CHARITABLE FUND \$14,010

To benefit education, the arts, and human services.

MARISA LABOZZETTA AND MARTIN WOHL FAMILY FUND \$135,632

LYMAN AND MERRIE WOOD FAMILY FUND \$22,200

ANGELA AND JOSEPH T. WRIGHT CHARITABLE FUND \$100,186

YOUNG-WEBER FAMILY FUND

AGENCY ADVISED FUNDS

Funds established by nonprofit organizations can be permanently endowed with principal preserved (agency endowed), or they can permit distributions of principal (agency advised). Agency funds offer potential donors the assurance of responsible stewardship, professional investment, fundraising assistance to the nonprofit (including planned giving) and, where desired, the long-term preservation of principal.

ANONYMOUS \$571,342

AMHERST COMMITTEE FOR A BETTER CHANCE ABC FUND \$84,330

To serve talented and motivated ALANA youth preparing for college.

AMHERST SURVIVAL CENTER FUND

LOUIS BEEH SCHOLARSHIP FUND
\$30,068

To support the work of the East Longmeadow Scholarship Foundation.

CARSON CENTER FUND AT BEHAVIORAL HEALTH NETWORK
\$41,570

CHILDREN'S BRIGHTER FUTURE FUND \$15,513

To support programs at the Child and Family Service of Pioneer Valley, Inc.

CLAPP MEMORIAL LIBRARY FUND
\$59,727

COMMUNITY LEGAL AID FUND
\$25,026

DAKIN PIONEER VALLEY HUMANE SOCIETY FUND \$31,615

EAST LONGMEADOW EDUCATION FUND \$52,081

EAST LONGMEADOW SCHOLARSHIP FOUNDATION FUND \$69,159

EASTERN STATES EXPOSITION FOUNDATION FUND \$95,139

JANET FEINSTEIN MEMORIAL FUND
\$8,382

To provide a foundation for the New England Adolescent Research Institute, Inc.

DONALD FLETCHER SCHOLARSHIP FUND \$62,722

To provide educational assistance to employees of The Association For Community Living.

FOOD BANK OF WESTERN MASSACHUSETTS FUND \$22,982

FRIENDS OF THE HOLYOKE MERRY-GO-ROUND, INC. FUND \$40,487

FRIENDS OF HADLEY PRESCHOOL FUND \$63,100

GREENFIELD COMMUNITY COLLEGE FOUNDATION FUND \$284

GOODWILL INDUSTRIES FUND
\$22,939

BART GORDON MUSIC FUND AT THE JACKSON STREET SCHOOL \$16,822

To provide music opportunities for economically disadvantaged young people.

THE GRAY HOUSE FUND \$16,498

GREATER SPRINGFIELD SENIOR SERVICES, INC. FUND \$18,030

HAMPDEN LIBRARY FUND \$12,156
JOHN T. HICKEY PRESERVATION FUND FOR THE HOLYOKE MERRY-GO-ROUND \$33,817

HOLYOKE COMMUNITY COLLEGE FOUNDATION FUND \$17,100

HUMAN RESOURCES UNLIMITED FUND \$22,173

JESSIE'S HOUSE FUND \$28,787

To assist Jessie's House in Northampton, a program of the Center for Human

Development that provides shelter and support to the homeless.

KESTREL LAND TRUST FUND
\$62,754

To support the conservation of farmland, woodlands, and wildlands in the heart of the Connecticut River Valley.

MARTIN LUTHER KING, JR. COMMUNITY CENTER YOUTH EDUCATION FUND \$9,587

LATHROP COMMUNITIES, INC. FUND
\$14,941

LONGMEADOW EDUCATIONAL EXCELLENCE FOUNDATION FUND
\$817,343

LOOMIS LAKESIDE AT REEDS LANDING MEMORIAL RESERVE FUND
\$301,975

ALICE K. LUCEY MEMORIAL FUND OF UNITED WAY HOLYOKE, SOUTH HADLEY & GRANBY, INC. \$27,934

To further the United Way's mission in the communities it serves.

LUDLOW BOYS AND GIRLS CLUB FUND \$18,039

MASSACHUSETTS PHARMACISTS ASSOCIATION FOUNDATION

MENTAL HEALTH ASSOCIATION OF GREATER SPRINGFIELD, INC. FUND
\$36,518

MOUNT GRACE LAND CONSERVATION TRUST FUND
\$27,888

NORTHAMPTON EDUCATION FOUNDATION ENDOWMENT FUND
\$1,060,236

NORTHAMPTON EDUCATION FOUNDATION ENDOWMENT FUND-NORTHAMPTON AREA PEDIATRICS FUND \$52,485

NORTHAMPTON EDUCATION FOUNDATION ENDOWMENT FUND-FLORENCE SAVINGS BANK FUND FOR PUBLIC EDUCATION \$104,921
NORTHFIELD MOUNT HERMON

UPWARD BOUND FUND \$569,958

NOT BREAD ALONE FUND \$6,187

For program support as recommended by the Center for Human Development.

ORANGE LIBRARY BUILDING FUND
\$81,912

PALMER PUBLIC LIBRARY ASSOCIATION ENDOWMENT FUND
\$231,037

PIONEER VALLEY GIRL SCOUT COUNCIL, INC. FUND \$7,348

JEROME A. ROSENTHAL AND DAVID SIGELMAN MEMORIAL COMMUNITY MUSIC FUND \$45,308

To support the scholarship program of the Northampton Community Music Center, Inc.

ROTARY CLUB OF SPRINGFIELD FUND \$12,455

PHYLLIS WHEAT SMITH NATURALISTS' FUND \$56,590

To support The Naturalists Club in land acquisition, wildlife preservation and rehabilitation, habitat protection, environmental education, and promoting an awareness of nature.

SMITH VOCATIONAL-AGRICULTURAL HIGH SCHOOL FUND (SCHOLARSHIP)
\$239,461

SMITH VOCATIONAL-AGRICULTURAL HIGH SCHOOL FUND (UNRESTRICTED) \$289,893
MICHAEL E. SMITH ENDOWMENT FOR EXCELLENCE IN EDUCATION
\$540,923

To enhance opportunities and experiences for students in South Hadley public schools.

STRONG FAMILIES-STRONG NATION FUND \$15,513

To support programs that will enhance communication, cooperation, and understanding within families of the Pioneer Valley.

JEAN MARTIN FUND FOR THE UNITED ARC OF FRANKLIN AND HAMPSHIRE COUNTIES \$58,696

WEST SPRINGFIELD PUBLIC LIBRARY FUND \$904,346

WFCR FUND \$20,459

WGBY/57 EDUCATIONAL ENDOWMENT FUND \$75,788

THE DOROTHY ANNE WHEAT NATURALISTS' FUND \$19,562

To support The Naturalists Club in open land acquisition and animal rehabilitation.

YOUNG MEN'S CHRISTIAN ASSOCIATION OF GREATER SPRINGFIELD YOUTH DEVELOPMENT ENDOWMENT FUND \$46,928

YOUNG @ HEART CHORUS FUND
\$49,938

HARRY J. AND NORMA V. PIERPAN HIGH ADVENTURE CAMPSHIP FUND

For the benefit of the Great Trails Council, Inc., Boys Scouts of America.

AGENCY DESIGNATED FUNDS

Unless otherwise noted, the following agency advised funds support the work of the organizations named in the fund title.

AMHERST SURVIVAL CENTER ENDOWMENT FUND

THE ASSOCIATION FOR COMMUNITY LIVING ENDOWMENT FUND \$3,175

THE ATHENEUM SOCIETY OF WILBRAHAM FUND \$68,833

For the Old Meeting House Museum and its collection of historical materials.

ERIC BACHRACH ENDOWMENT FUND FOR THE COMMUNITY MUSIC SCHOOL OF SPRINGFIELD \$12,973
ROBERT BENEDETTI MEMORIAL

FUND FOR THE PALMER PUBLIC LIBRARY \$32,958

BOYS AND GIRLS CLUB OF GREATER WESTFIELD ENDOWMENT FUND
\$39,197

CHILD AND FAMILY SERVICE OF PIONEER VALLEY, INC. ENDOWMENT FUND \$16,483

To support the child and family service programs of the Center for Human Development, Inc.

MARTHA LUDINGTON/HENRIETTA F. DEXTER FUND FOR THE CHILDREN'S STUDY HOME \$59,694
COMMUNITY MUSIC SCHOOL OF SPRINGFIELD SCHOLARSHIP PROGRAM FUND \$42,715

EASTERN STATES EXPOSITION FOUNDATION ENDOWMENT FUND
\$10,649

EASTHAMPTON LEARNING FOUNDATION ENDOWMENT FUND
\$697,932

FIRST CONGREGATIONAL CHURCH OF CHESTER FUND \$19,520

FRIENDS OF GRANDMOTHER'S GARDEN, INC. ENDOWMENT FUND
\$291,538

GLENMEADOW FUND \$48,042

HATFIELD EDUCATION ENDOWMENT FUND \$75,118

KARUNA CENTER FOR PEACEBUILDING ENDOWMENT FUND
\$11,168

LONGMEADOW EDUCATIONAL EXCELLENCE FOUNDATION ENDOWMENT FUND \$40,120

GENEVIEVE EMERSON AND GRACE P. MEEKINS FUND FOR THE MSPCA
\$26,420

NEW ENGLAND WILD FLOWER SOCIETY NASAMI FARM ENDOWMENT FUND \$12,820

OLD FIRST CHURCH FUND FOR THE MAINTENANCE OF ITS MEETINGHOUSE AND ORGAN \$833,087

OLD FIRST CHURCH FUND FOR SENIORS OF GREATER SPRINGFIELD \$303,126

OLD FIRST CHURCH FUND FOR THE HOMELESS OF GREATER SPRINGFIELD \$303,126

SERVICENET/GROVE STREET INN ENDOWMENT FUND \$42,466

SERVICENET SHELTERS ENDOWMENT FUND \$91,860

SISTERS OF SAINT JOSEPH OF SPRINGFIELD MINISTRY ENDOWED FUND

SONS AND DAUGHTERS OF HAWLEY ENDOWMENT FUND \$30,905

To provide long-term financial support for preserving the history of Hawley, MA and its historic landmarks.

SPRINGFIELD BOYS CLUB/CAREW HILL GIRLS CLUB FUND \$37,411

SPRINGFIELD DAY NURSERY FUND \$38,998

SPRINGFIELD GIRLS CLUB FAMILY CENTER H. F. DEXTER FUND \$29,055

KRAVETZ ENDOWMENT FUND FOR THE UNITED ARC OF FRANKLIN AND HAMPSHIRE COUNTIES \$22,841

UNITED WAY OF HAMPSHIRE COUNTY ENDOWMENT FUND \$68,843

WING MEMORIAL HOSPITAL FUND \$25,416

WOMEN'S FUND OF WESTERN MASSACHUSETTS ENDOWMENT FUND

ANGELA WRIGHT FUND FOR THE CARE CENTER \$17,405

YWCA FUND FROM HENRIETTA F. DEXTER TRUST \$55,485

PLANNED GIVING FUNDS

Planned giving arrangements provide a unique combination of direct benefits to both charities and donors, or other beneficiaries, most frequently by providing income for life from the funds contributed.

THE ANONYMOUS 1996 CHARITABLE REMAINDER UNITRUST \$39,188

To establish a fund for addressing critical needs in Hampshire County.

ANONYMOUS 2012 CHARITABLE GIFT ANNUITY \$217,141

ANONYMOUS 2005 CHARITABLE REMAINDER UNITRUST \$646,148

To establish a fund to benefit charities of interest to the donors.

RAYMOND E. CARR CHARITABLE REMAINDER UNITRUST \$397,931

To benefit the Raymond E. Carr Scholarship Fund.

PRISCILLA CARTER CHARITABLE GIFT ANNUITY \$93,228

To benefit a fund to support charities of interest to the donor.

JOHN AND PAULA GALLUP CHARITABLE REMAINDER UNITRUST \$76,301

To ensure that the donors' charitable giving will continue to benefit western Massachusetts in perpetuity.

GEWANTER FAMILY CHARITABLE REMAINDER UNITRUST \$736,060

To establish a fund to support the charitable interests of the donors.

JEAN VONL. HAYES CHARITABLE GIFT ANNUITY \$1,292

To benefit the Loomis Lakeside at Reeds Landing Fund.

HILLTOWN ENDOWMENT ANNUITY \$40,217

To establish a fund to support charitable work in the hilltowns.

CHARLES M. JOHNSON CHARITABLE GIFT ANNUITY

To benefit the Loomis Lakeside at Reeds Landing Fund.

SUSAN W. LOWENSTEIN CHARITABLE REMAINDER TRUST \$47,528

To permanently support The Women's Fund of Western Massachusetts with preference for women's reproductive health programs.

CAROLINE MURPHY CHARITABLE GIFT ANNUITY \$4,421

To benefit the Glenmeadow Fund.

BERNARD AND ROSEMOND M. PAINE CHARITABLE REMAINDER ANNUITY TRUST \$430,307

To establish a fund to provide scholarships to deserving students from the public schools of West Springfield.

PRISCILLA L. PIKE CHARITABLE GIFT ANNUITY \$119,232

To establish a fund to benefit the First Church of Christ, Northampton.

JOHN PTASZEK FAMILY CHARITABLE GIFT ANNUITY \$19,089

To benefit the John Ptaszek Family Scholarship Fund.

ELEANOR B. ROTHMAN CHARITABLE GIFT ANNUITY \$4,825

To benefit the Congregation B'Nai Israel L'DOR V'DOR Endowment Fund.

ROBERT C. SMITH CHARITABLE GIFT ANNUITY \$1,588

To benefit the Loomis Lakeside at Reeds Landing Fund.

MISCELLANEOUS FUNDS

To be flexibly responsive to the broadest interests and objectives of donors, the Community Foundation occasionally receives and holds assets subject to charitable restrictions unlike those applicable to the other categories of funds listed above.

DEROSE FAMILY CHARITABLE FUND (PROMISSORY NOTE) \$638,000

To assist charitable interests and causes, primarily in Hampshire County.

PHILIP M. SCHWARTZ MEMORIAL FUND \$500,000

COMMEMORATIVE GIFTS

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