

COMMUNITY
FOUNDATION
OF
WESTERN
MASSACHUSETTS

Change in Action Report to our Community 2022

SERVING
FRANKLIN,
HAMPDEN, AND
HAMPSHIRE
COUNTIES



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 perpetual, 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

Our Commitment to Equity, Diversity, and Inclusion:

We will advance equity, diversity, and inclusion throughout the region's three counties, including our workplaces and institutions, by prioritizing racial equity in all facets of our work.

We have chosen racial equity specifically because of the pervasiveness of racism in interpersonal and intrapersonal relationships and interactions, institutions, and systems in our region and in our country throughout our history. We believe that working toward dismantling systems of racial inequality provides a framework for dismantling all other forms of oppression.

We commit to:

- **Combatting prejudice and discrimination** by making intentional and equitable choices;
- **Prioritizing racial equity** intentionally and continually in our policies, practices, systems, and structures;
- **Promoting social justice** by amplifying the voices of our marginalized and underrepresented community members;
- **Fostering trust** by increasing transparency and accessibility; and
- **Expanding shared decision-making.**

Thank you for joining us in this work to make our communities more equitable and just.

“We recognize the need for philanthropy to evolve—to center equity in how we receive contributions and in how we invest those dollars in our community.”

Katie Allan Zobel
PRESIDENT & CEO

An Open Letter to Our Community

This past year has reaffirmed for us the deep and abiding commitment our community has to supporting one another. Despite ongoing challenges rising from the pandemic, economic shocks, longstanding inequities, and the Great Resignation, we continue to witness the remarkably generous spirit, creativity, and determination that are hallmarks of our region. Along with all of you and our community partners, we are forging ahead. We returned to many of our in-person engagements and convenings, while also maintaining hybrid access to each other. We continued to listen and learn, assess and reassess, adjust and create new solutions and systems.

As our community moves forward, one feeling emerges over and over again—gratitude. We are grateful for all the learning and adapting underway, for the generosity of our neighbors, and for our creative staff, committee members, and partners. We are filled with gratitude for the near record-breaking \$40 million received from friends and neighbors near and far that will help hundreds of thousands across our region for years to come. These contributions to current use and long-term endowed funds provide us with an increasing amount of support for our community each year. As a result of past generosity, we were able to invest \$16.6 million in our community, all with the help of community members who directed those grants and scholarships. And we are grateful for the hope and promise this collaborative work holds for a brighter, more vibrant, and equitable future.

While we continued to focus efforts this year on pandemic-related relief for community organizations and funding students and artists, many of whom experienced financial challenges, we also began turning our attention to developing new ways of working. This past year, our staff, Trustees and

Distribution Committee invested hundreds of hours in learning, discussing, and planning, and we now have a 3-year action plan to advance equity, diversity, and inclusion in all aspects of our efforts. One of our first actions was to develop and agree upon a commitment statement to guide our work; and a grantmaking policy that prohibits funding to organizations that discriminate or encourage hate or violence. We restructured our grantmaking to support efforts focused on more equitable outcomes. We are working to reduce barriers and increase flexibility to better support community partners. We are encouraging donors to join us in providing general operating dollars that allow organizations to direct support where it is needed most to ensure organizational strength and effectiveness.

We recognize the need for philanthropy to evolve—to center equity in how we receive contributions and in how we invest those dollars in our community. We are learning to approach this work with humility and patience. We understand that to ensure fundamental and lasting change, we must be committed to a continual process. Philanthropy must be, at its core, learning and not knowing.

Certainly, this moment in the Foundation’s existence is marked by deep organizational and impactful change. It includes with it an opportunity to usher in a new president and chief executive officer who will share in the Foundation’s commitment to growth and advancement by inspiring new ideas, nurturing new successes, and encouraging greater connections and relationships across our region. We invite you to be a part of the change ahead and express our sincere gratitude for your commitment to building a more vibrant, just, and equitable community for all in our region.



Katie Allan Zobel
Katie Allan Zobel
President and CEO



Paul R. Murphy
Paul R. Murphy
Trustee Chair



Karin Lee George
Karin Lee George
Trustee Vice Chair

Our Impact

TOTAL ASSETS

\$263.7 Million

SCHOLARSHIPS & LOANS AWARDED

\$1.6 Million

GRANTS AWARDED

\$15 Million

GROSS CONTRIBUTIONS RECEIVED

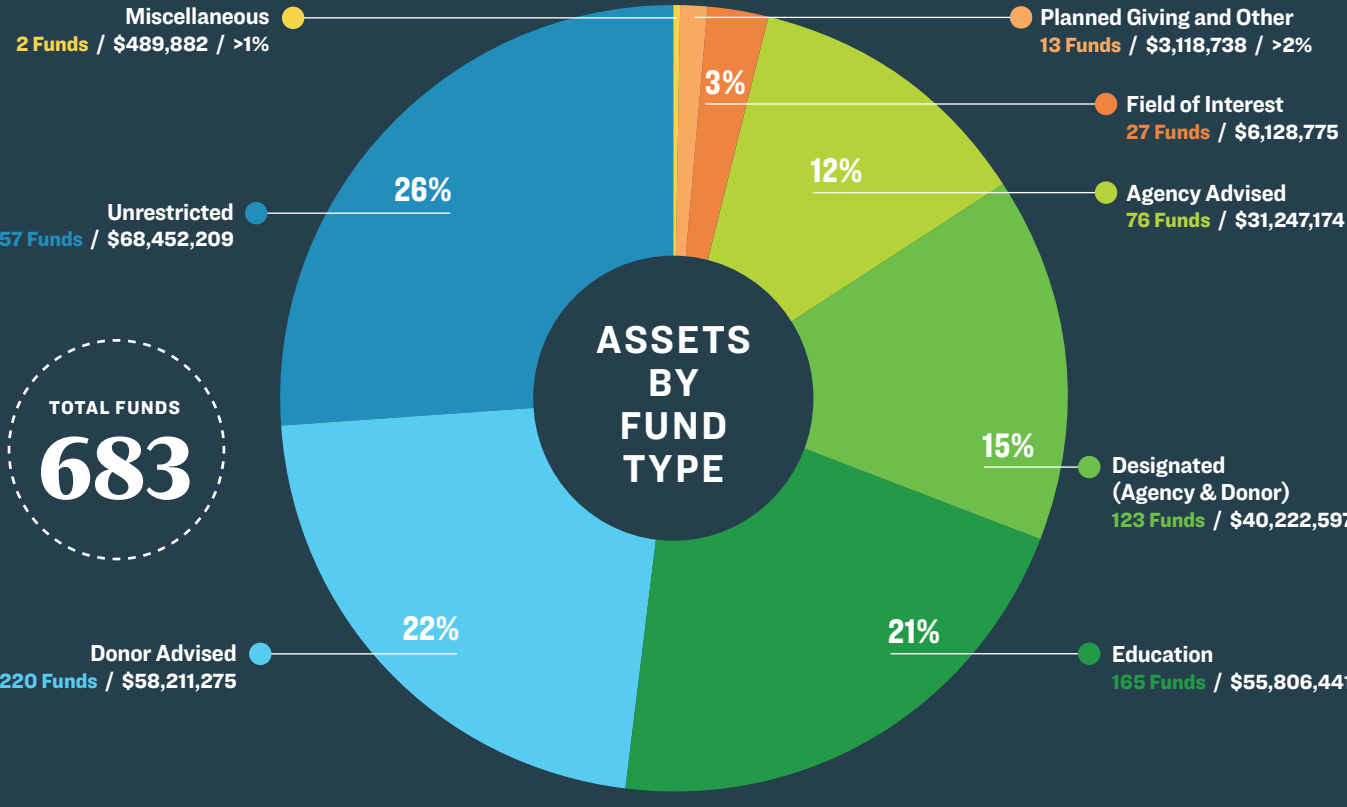
\$38.4 Million

TOTAL DISTRIBUTION

\$16.6 Million

+

=



Unaudited financial information; more detailed financial information available on our website.

In Memoriam



MARCIA BURICK

Marcia Burick, *Emerita Trustee* and long-time champion of the Foundation passed away June 2022. Marcia was a mover and shaker, deeply involved and committed to her community and to the Foundation. She served nine years as a Trustee, was a member of the Foundation’s first Distribution Committee, and also served as Chair of the Education Committee. Marcia was especially passionate about education issues and helped design the Foundation’s first proactive grantmaking initiative, which supported nonprofits collaborating on early education issues. She had a wonderful way of contributing to a sense of fellowship and always made people feel as if each of their efforts mattered. Marcia was a force. Her tremendous energy, warm heart, and generous spirit will endure here at the Foundation and throughout our community, but we will miss her.

In February 2022, the Foundation lost an exceptional advisor and a beloved member of our community, **Kent Alexander**. Kent was a marvelous advocate, devoted to social justice work, anti-racism, and collective healing. In 2017, he became one of ValleyCreates’ first advisors helping to embed equity and inclusion principles and practices into the Foundation’s arts grantmaking. Like much of his past work, Kent did so with effortless enthusiasm and a strong passion for what the spirit of ValleyCreates could be in our region. He served by giving much of himself, using past lessons to pave a road for the work ahead. Kent leaves an indelible legacy within the Community Foundation and across Western Mass. His generosity lives on in our work and with all the lives he touched.

KENT ALEXANDER



Credit: Erin Long Photography

Building for a Stronger Future

It took 38 years, but the International Language Institute of Massachusetts (ILI) in Northampton is on the verge of finally having a fundraising manager on staff.

“In the past, we just couldn’t make that leap,” said Executive Director Caroline Gear.

But last year, Gear spotted a message in her inbox about a new Community Foundation-sponsored training program for nonprofits: Network for Good’s Jumpstart. It offered to build fundraising know-how and technology.

Gear was all in, and soon ILI, a language learning and teacher training school, was in the first group of Western Massachusetts organizations delving into Jumpstart.

It didn’t take long for ILI’s fundraising to reach new heights, thanks to fresh, robust software with donor video capabilities, stronger messaging, technical support, outreach plans, and steady coaching from a fund development expert. A mix of virtual and in-person fundraising events fueled the effort.

As important, Gear said, was a shift toward “giving voice to the experiences of ILI’s students.” Events celebrated the resilience of many who immigrated to this region to work toward better lives for themselves and their families, while bringing their skills to local industries.

So far, she said, Jumpstart “has paid huge dividends.” The organization exceeded its annual fundraising goal in just six months.

Gear credits a strong partnership with the Community Foundation in positioning ILI for long-term growth and success in serving the region’s diverse residents.

Foundation grants helped ILI recover from the COVID crisis, and flexible funding provided expertise and resources. Both have Gear feeling “incredibly lucky.”

“We were concerned about fundraising this year because of the potential recession and global uncertainty. All the more reason why we are so grateful to have a strong platform on which to build.” ●



Jaime Alvarez and Alyssa Li were among the celebrants at ILI’s 2022 Giving Voice fundraising event.

Credit: Jesse Shortland Imaging

Fighting for the Dignity and Health of Farmworkers

You may have heard Claudia Rosales speak at the Community Action Center in Greenfield. Or maybe at the Unitarian Society in Northampton or at Baystate Medical Center.

She immigrated from El Salvador ten years ago to work the fruit, vegetable and tobacco farms along the Connecticut River Valley. Now, as the co-director of the Pioneer Valley Workers Center (PVWC), Rosales and her farmworker colleagues are courageously telling their stories to audiences around the region to gain support for better working conditions, wages, and health protections.

Many of the agricultural farms in Western Massachusetts rely on immigrant labor. Some of those workers face deplorable labor conditions—denied water, lunch breaks, protective equipment or dignified bathrooms. Some endure racist taunts, sexual harassment, and wage theft. And the \$8 minimum hourly wage for farmworkers is far lower than most other workers in our state.



Farmworkers, PVWC organizers, and co-op farmers show support for the Fairness for Farmworkers bill.



Claudia Rosales, co-director of the Pioneer Valley Workers Center

Led by Rosales, PVWC emboldens its members—now numbering hundreds—to organize and speak out. Their successes are piling up.

“A lot of farm workers have lost their fear,” she reported. “Now they come to the Workers Center and say, ‘This is happening to me. I need help.’ Before, they didn’t do that. They would be too scared they’d be fired. Now, they feel the support from the public and the organizations. They feel safer.”

In 2023, a new law—backed by a broad coalition of groups—will allow all residents of Massachusetts to be eligible for a drivers license, regardless of legal status.

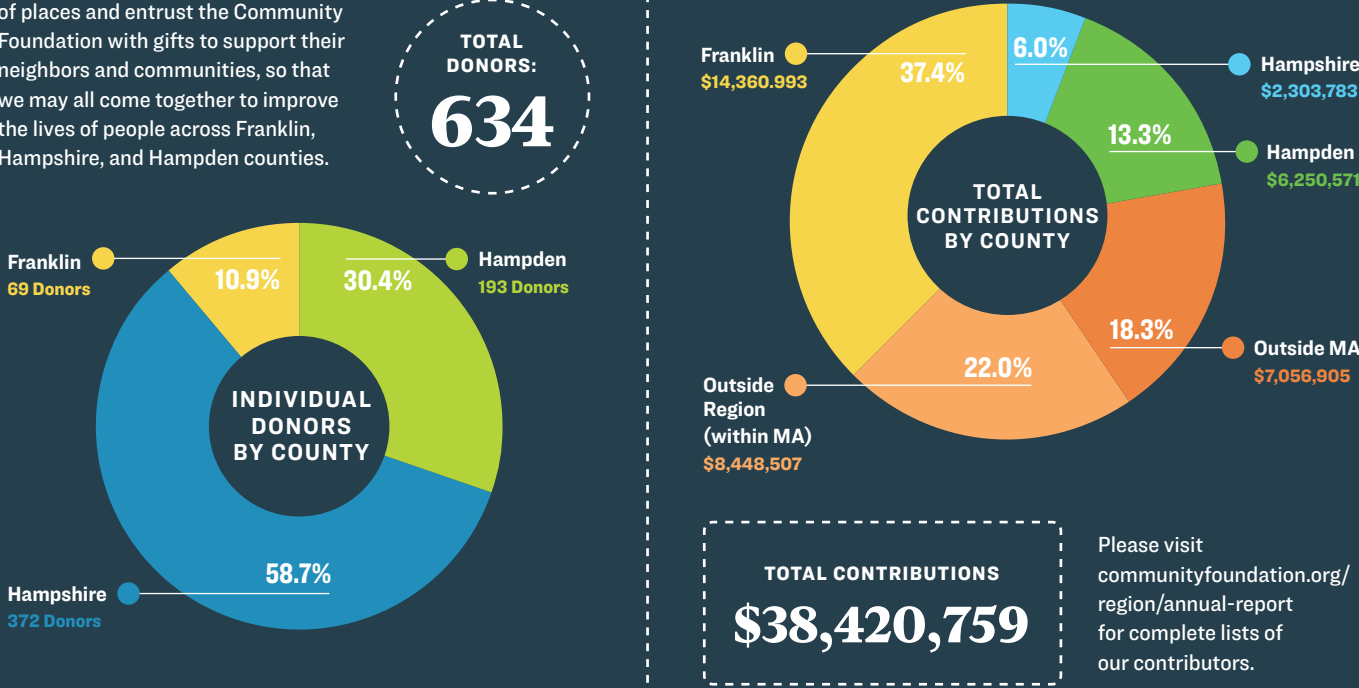
And, since farmworkers typically lack health insurance and health care, PVWC is going farm-to-farm to train workers on wearing sunblock and hats to protect their skin and on ways to access medical care and vaccines.

Said Rosales, “I would like people to know that despite the fact we are undocumented, we still have rights. When people hear our testimonies and what we live through, they learn how to spread the word and help us fight.” ●

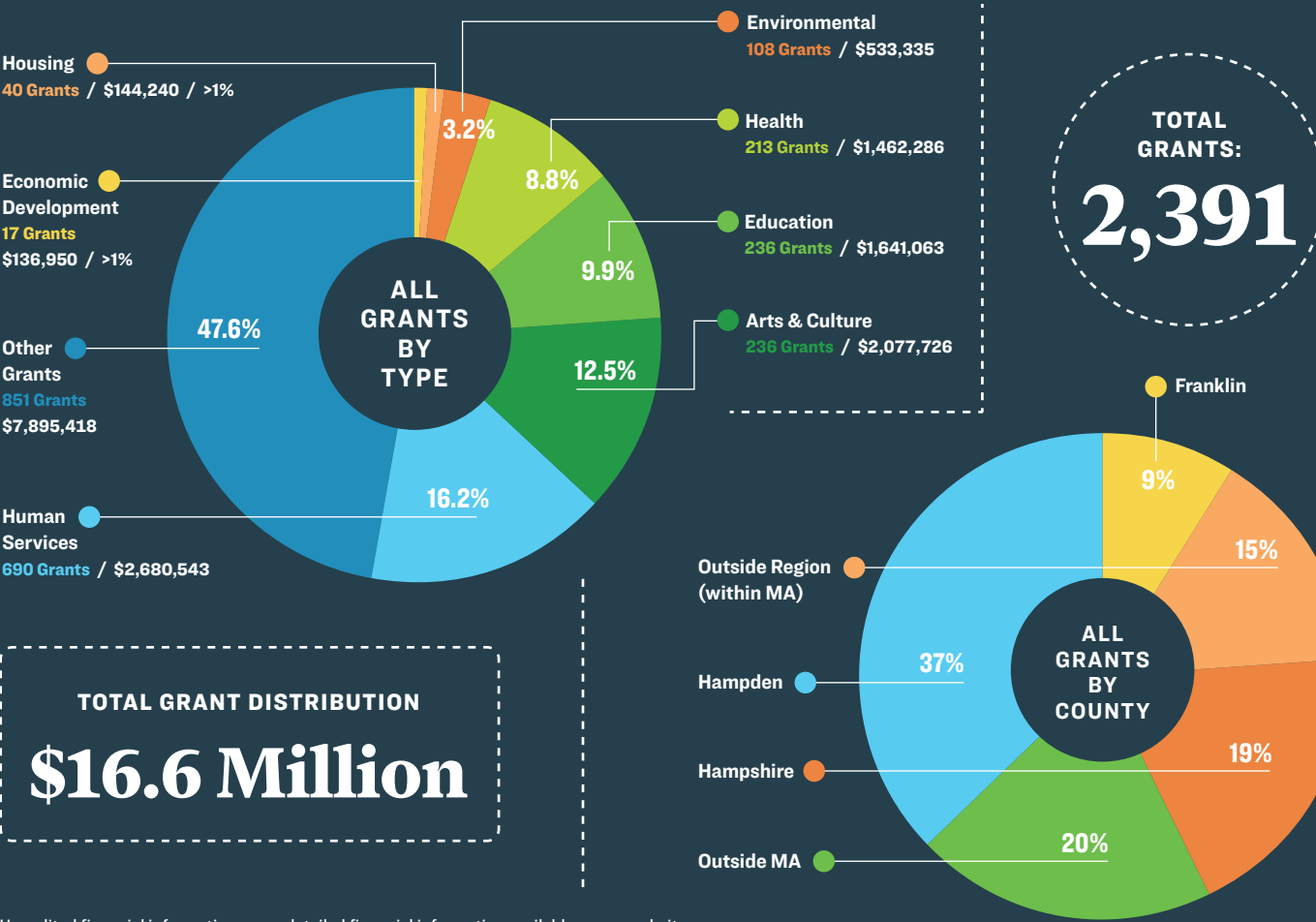
Credit: Alfonso Neal, Pioneer Valley Workers Center

Who Gave?

Our contributors hail from a wide variety of places and entrust the Community Foundation with gifts to support their neighbors and communities, so that we may all come together to improve the lives of people across Franklin, Hampshire, and Hampden counties.



Grantmaking



Unaudited financial information; more detailed financial information available on our website.



Triska-Tushanna Bature graduated on June 4, 2022 with an associate's degree in nursing from Greenfield Community College

WESTERN MASS COMPLETES

With a Boost, Nurses Cross the Finish Line

Amy Prioetti, coordinator of financial aid at Greenfield Community College (GCC), was about to hit “send” to surprise Triska-Tushanna Bature with good news: Bature was one of five nursing students selected to receive a \$2,500 “completion grant” though the Community Foundation.

A Chicopee resident in the last semester of GCC’s two-year nursing program, Bature had set her sights on becoming a midwife. She had persisted through eight years of community college and impressed Prioetti with her tenacity.

While supporting her aging mother, Bature juggled studies, a job, and caring for her two young children. Yet, college bills stacked up next to household and family expenses. At times, Bature dipped into public assistance programs or the local diaper bank.

Prioetti never sent the email, because at that moment, Bature was on the line. “What was cool was that I got to tell her about the grant on the phone,” Prioetti said.

Bature will never forget it. “I was laughing and crying, because I was calling for help to pay for a capstone project fee of \$350. I felt so stressed because I didn’t have it and I was so close to graduation.”

Bature’s story is common. A study commissioned by the Community Foundation, Western Mass Completes, revealed that seemingly small barriers facing students every day often force them to “stop out” from college.

That’s why, with input from Prioetti, the Community Foundation piloted completion grants for nursing students at GCC. The funding was for overdue bills, licensure or exam fees, or any expenses hindering college completion. Grant dollars were distributed with minimal delays.

The grants worked. “We got those students over the finish line,” Prioetti said. “Many had stopped and started their college education many times. And, at a community college, sometimes the difference in moving forward into the next semester is as little as \$200.” ●

College Completion Rates for Older Students

60%
of students who are pursuing a degree at a **4-year college** graduate.¹

25%
of students who are pursuing a degree at a **2-year college** graduate.¹

16.4%
of students **30 years and older** graduate within 5 years.²

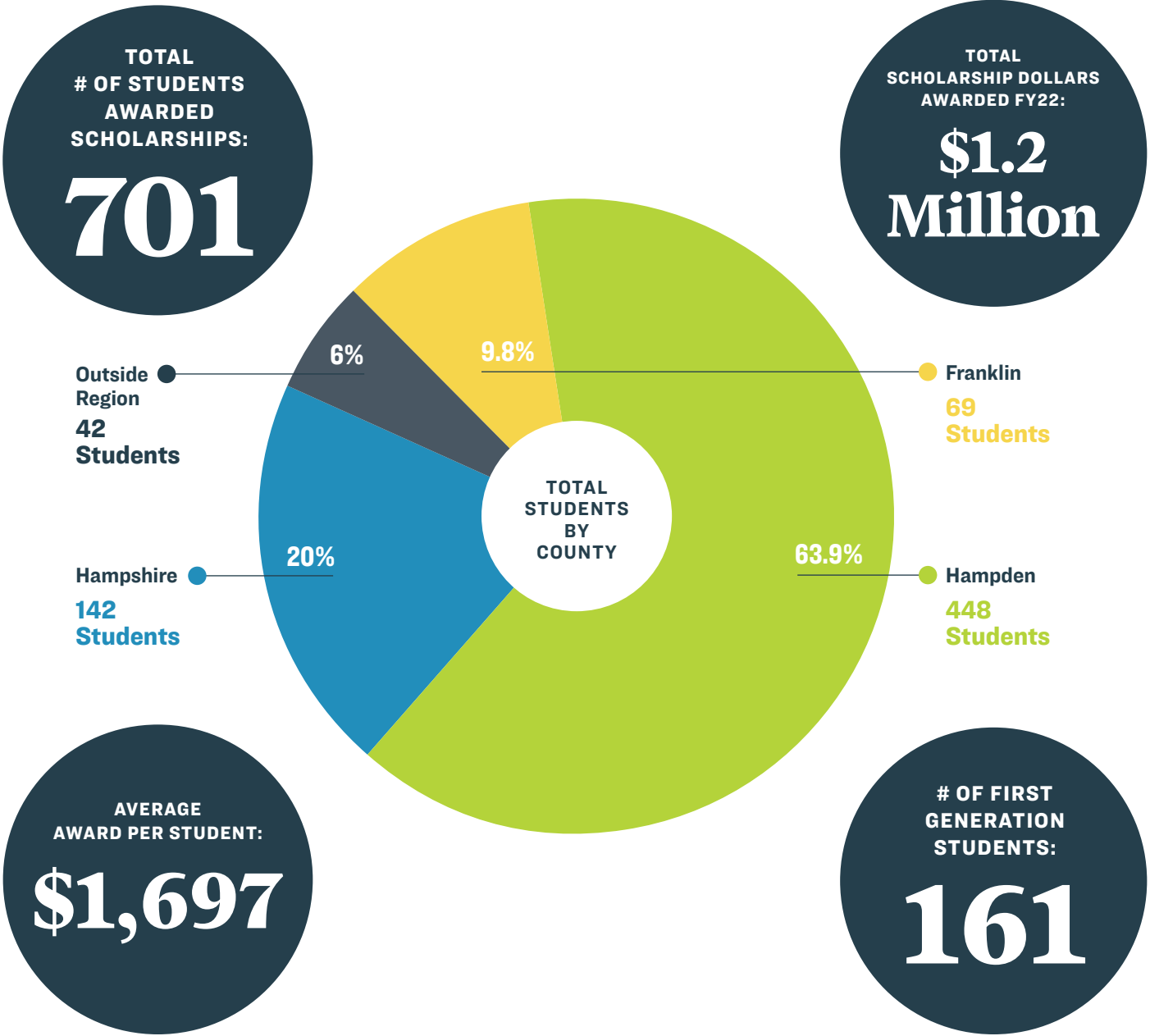
28.7%
of health care majors earn an **associate degree**.²

38.8%
of health care majors earn a **bachelor’s degree**.²

¹ From Georgetown University, *The College Advantage: Weathering the Economic Storm*

² Education Data Initiative

College Scholarships



College Loans



Unaudited financial information; more detailed financial information available on our website.

THE PERFORMANCE PROJECT

Widening the Circle of Leadership

Iyawna Burnett was 15-years old when she first took the stage with The Performance Project’s “First Generation” artistic ensemble. The experience changed the trajectory of her life.

In *The Ripple Effect*, Iyawna and other “First Gen” members shared childhood memories in a beautiful, woven story about family, culture, war, and dreams.

“It felt more like a family than a performing arts group,” Iyawna said of the young Springfield residents with whom she shared the stage.

Part of their bond was being “first.” “First Gen” members may be the first in their family to grow up in the United States, the first to speak English, to go to college, to be openly LGBT+, or many other “firsts.”

The peer support—and the sense of being listened to for the first time—unfurled a confidence in Iyawna that blossomed.

At 18, as a young mother, she took part in Performance Project Board meetings, mentored ensemble members, and co-directed theater pieces—often with her daughter in tow.



Iyawna, now a Performance Project co-director, holds her self-published book of poetry.

Now, at age 28, Iyawna is one of the Springfield-based nonprofit’s co-directors, alongside Julie Lichtenberg and James Arana. Each is committed to building the skills necessary for young leaders to soar. They envision up to eight full-time co-directors ultimately sharing administrative and artistic responsibilities. A flexible funding grant from the Foundation lends support.

First Gen “elders” like Iyawna are putting in the hours to learn everything from grant writing to program implementation to build on the organization’s successes. Thousands have already been inspired by the voices and experiences of its talented performers. Many are immigrants and refugees.

“Now we can say, ‘this is *my* organization,’” said an energized Iyawna. “The Performance Project is not just a program I perform with. I understand how it works because I’m teaching and performing. It’s something we can all hold up together and keep moving forward.” ●

Photos provided by The Performance Project

VALLEYCREATES GRANT RECIPIENT

The Girl Who Ate Books

María Luisa Arroyo Cruzado laughed when she said, “Like an artist with a mass of clay, I’m an artist playing with language.” The vivacious poet and writing professor at Bay Path University speaks four languages, including German and Farsi.

Born in Manatí, Puerto Rico and raised in Springfield, Arroyo Cruzado’s published poems touch on themes including women’s rights, racism, and “the collective truths of bicultural U.S. citizens.” Art and women poets often inspire her writing.

Her life experiences, she says, are the “raw materials” for her poetry, captured through a daily practice of journal writing since she was nine.

A grant from the Community Foundation is supporting Arroyo Cruzado’s next project, a collection of poetry she aims to publish in Spanish and in English. The poems are inspired by a journey across Puerto Rico with her “mami.” It was the first time in 36 years her mother had returned to the island where she was raised.

In tracing their visit, Arroyo Cruzado wants readers to “see history, see my respect for my mother’s journey, see the music of our different Spanish voices, and see the twin perspectives of my mother and me.”

“I am the product of my educational privilege in the United States, in Massachusetts, and in private colleges,” she said, “whereas my mom has been educated by life.” ●

The Foundation’s new ValleyCreates grant program, **Project Evolution**, supports twenty local artists in all stages of their projects from creation to implementation. Grantees include filmmakers, painters, musicians, and performers whose work engages the community in meaningful ways.

From *Destierro Means More than Exile* (2018) by María Luisa Arroyo Cruzado

“comelibros: the girl who ate books”

Kids in school & on my street nicknamed me “The Brain”. Where their backpacks slacked, mine swelled with books from two libraries, some stamped “obsolete”, mine to keep. Mami called me “comelibros”, the girl who ate books. Abuela feared me, whispered “loca”, my appetite for books matched her son’s, an urban hermit in Puerto Rico. He crammed towers of books into his head. Words gushed out his mouth – non-stop. I live in my head to protect my body.

María Luisa Arroyo Cruzado (L) with her mami in Puerto Rico



Fifteen-year-old Iyawna Burnett (far right) in *The Ripple Effect*.

Keeping a Young Engineer's Memory Alive



(L to R): Michael, Stanley, and Elizabeth
"Betty" Smiarowski, Julie and Mike Haneski.
Photo courtesy of Julie Haneski

Julie Haneski will always keep the old, framed photo in her Sunderland home. It was taken at the last family get-together before her brother, Michael Smiarowski, lost his life in a car accident. He was 25.

Julie recalled Michael as the kind-hearted kid brother who shared the workload on their family farm in Montague, picking cucumbers, shearing asparagus spears, and harvesting corn. Years later, he was the soft-spoken free spirit who bought himself a jet ski fresh out of college.

When Michael headed to Cornell to study engineering, his mother Betty, a math teacher at Holyoke Community College, and father, Stanley, a third-generation farmer, could not have been prouder. They knew all about hard work and the people struggling to earn college degrees.

In establishing the Michael A. Smiarowski Memorial Scholarship Fund at the Community Foundation after Michael's death, Betty and Stanley wanted to help students in their area go to college—and keep Michael's memory alive.

They've done it. Dozens of students from Turners Falls High School and Frontier Regional School in South Deerfield have received scholarships from the fund since 2002.

Betty and Stanley are no longer with us, but Julie knew how meaningful the scholarships were to them. "Having students honored every year with scholarships from the memorial fund was an important way to focus on Michael," she said.

"The Foundation was always in contact with my mother," Julie added. "The staff visited her over the years, and we went to the annual meetings. They always embraced her, brought up my brother, and told her what the scholarships meant to students. That was just so important to my mother, and she knew she had picked the right place to have the scholarship established." ●

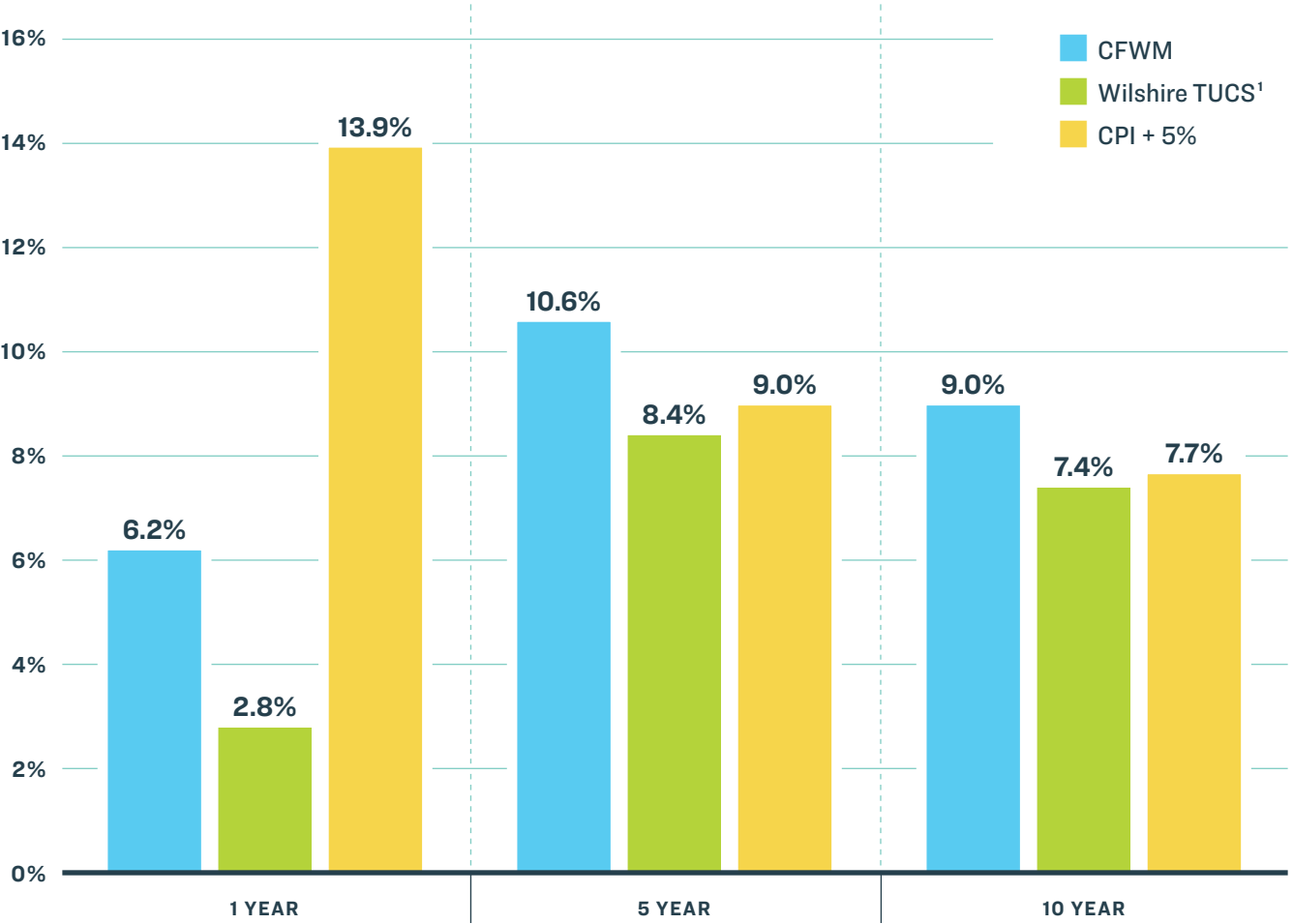
Create Your Legacy, Support Your Community

We want to help you put your passion into action. To establish a new charitable fund to support the causes you care most about and to invest in our community, contact us. You can choose from several flexible giving options that help you to create a lasting impact in our region. Whether you care most about arts and culture, community health and well-being, the environment, supporting college students with scholarships, or creating more inclusive communities, we can help you meet your charitable goals. Give now or after your lifetime.

You can reach Joanna S. Ballantine, vice-president for philanthropic services or Keith McKittrick, director of philanthropic operations, at 413-732-2858 or info@communityfoundation.org.

Comparison of Returns For Global Growth Portfolio

AS OF MARCH 31, 2022



¹ The Wilshire Associates TUCS, the most widely-accepted benchmark for institutional assets, includes approximately 900 plans representing \$2.9 trillion in assets. In order for a more accurate comparison, a 0.8% reduction was used to compare all results net of fees.

Investment Commentary FY22

The Community Foundation of Western Massachusetts’ Global Growth Portfolio generated a 6.2% return net of investment-related fees in fiscal year 2022. Over the past 10 years, the Global Growth Portfolio has grown from roughly \$59.9 million to \$141.7 million. This investment pool has been developed by the Community Foundation’s Investment Committee as the primary vehicle for funds invested for the long-term. Its objective is the generation of maximum long-term total returns within levels of risk determined to be prudent by the Foundation Trustees. The Community Foundation believes that a multi-asset class portfolio, consisting of investments throughout the world, best fulfills that objective. The

portfolio is primarily invested in publicly traded US and International equities and US bonds exclusively using low-cost indexed mutual funds. The Global Growth Portfolio’s investment performance exceeded the Wilshire Trust Universe Company median—a compilation of large institutional investors’ investment returns net of all fees, for all periods. The Community Foundation’s 10-year return of 9.0% ranked comfortably in the top half (1.6% annualized above the median net of fees) of the Wilshire Trust Universe Company median. Assets at fiscal year-end were invested in 57% US Equity, 24% Non-US Equity and Emerging Markets, and 19% Fixed Income investments.

Financial Highlights

	2022	2021
	\$263,677,089.00	\$231,278,703.22
Operating Expenses	\$3,429,244.00	\$3,007,677.00
Operating Expenses as a Percentage of Total Assets	1.30%	1.30%
Contributions	\$38,420,763.00	\$24,025,871.00
Grants	\$16,190,495.00	\$17,955,213.00
Loans	\$384,000.00	\$342,000.00
Total Distributions	\$16,574,495.00	\$18,297,213.00

Unaudited financial information; more detailed financial information available on our website.

Statement of Financial Position

MARCH 31, 2022 AND 2021

ASSETS	2022	2021
Cash and money market funds	\$14,139,067	\$7,270,904
Fees receivable		
Investments	\$240,737,421	\$217,255,840
Assets held under charitable trusts	\$3,118,738	\$3,379,184
Notes receivable	-	\$271,751
Loans receivable, net	\$2,838,520	\$2,884,385
Contributions receivable	\$2,650,000	-
Prepaid expenses	\$66,841	\$51,315
Property and equipment, net	\$126,502	\$165,324
TOTAL ASSETS	\$263,677,089	\$231,278,703

LIABILITIES	2022	2021
Accounts payable and accrued expenses	\$239,394	\$202,501
Grants payable	\$1,012,413	\$8,000
Liabilities under unitrust agreements	\$1,364,953	\$1,585,465
Agency funds	\$23,351,155	\$21,811,516
TOTAL LIABILITIES	\$25,967,915	\$23,607,482

NET ASSETS	2022	2021
Without donor restrictions - undesignated	\$71,129,913	\$51,562,627
Without donor restrictions - Board designated	\$1,657,994	\$1,627,537
With donor restrictions	\$164,921,267	\$154,481,057
TOTAL NET ASSETS	\$237,709,174	\$207,671,221

	2022	2021
TOTAL LIABILITIES AND NET ASSETS	\$263,677,089	\$231,278,703

Trustees

AS OF AUGUST 2022



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HAMPSHIRE COUNTY



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HAMPSHIRE COUNTY



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HAMPDEN COUNTY



Mary-Beth A. Cooper
HAMPDEN COUNTY



Linda Dunlavy
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Gillian Hinkson
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VP for People & Culture
- Katie Allan Zobel
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- Mary-Beth A. Cooper
- Ashley Mowatt Travis
- David E. Pinsky
- Mary-Anne S. Stearns

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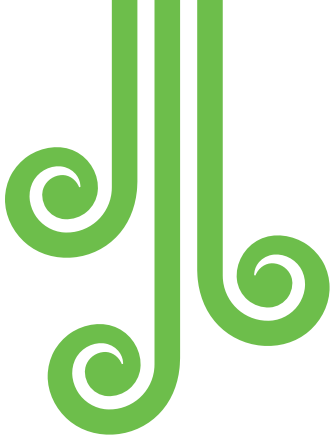
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- Nigel Greaves
- Leo Hwang
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- Elizabeth H. Sillin
- Doug A. Theobald



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- Mark Keroack
- Paul Murphy
- Elizabeth H. Sillin
- Doug A. Theobald

Community Advisors

- Matthew Glassman
- Andrae Green
- Irène I-SHEA Shaikly
- Johnny Miranda
- Vanessa Pabon-Hernandez



Strategic Vision and Priorities

The Community Foundation of Western Massachusetts is committed to increasing equity and opportunity so that all residents of Franklin, Hampden, and Hampshire counties have access to a satisfying quality of life. We will focus and lead in areas we believe will have significant impact on increasing equity and opportunity, utilizing all forms of capital to advance the following:

Charitable giving within our three counties and by marshalling resources from beyond our region.

Diversity, equity and inclusion in workplaces and institutions, starting with our own.

A strong start for all children through high-quality early education and care.

Accessible and more affordable post-secondary education and training, providing pathways to completion and employment.

A vibrant local arts and creativity ecosystem to support self-expression, economic vitality and connection.

Join us.

413-732-2858

communityfoundation.org

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