



# EQUITY IN ACTION

METROWEST  
HEALTH  
FOUNDATION

ANNUAL REPORT 2021

DO THEY HEAR US

I KNOW THEY  
SEE US THEIR  
SILENCE IS







## Equity in Action

In 2004, Edna Smith, then chair of the foundation's board of trustees, made a passionate plea to her colleagues that the foundation take a leadership role in addressing the racial and ethnic health disparities that existed in the MetroWest region. While the foundation had made many grants to address health disparities, Edna's plea was a clarion call that more could and should be done to address the root causes of health inequities—racism, discrimination and the unequal allocation of power and resources that result in unequal social, economic, and environmental conditions.

The work that Edna championed continues at the foundation. COVID-19 has put a new spotlight on health inequities, as people of color and those with lower income have been disproportionately affected by the pandemic in our region. As you will see in this 2021 Annual Report to the Community, we have responded using multiple strategies and actions to not only improve care, but to seek organizational improvements that address barriers to health equity, including the need for a more diverse caregiving workforce.

These accomplishments would not be possible without the work of the 60+ individuals who volunteer on behalf of the foundation. In addition to the MetroWest Racial & Ethnic Disparities Workgroup, our trustees, grant panel, audit, investment and distribution committee members, all play an important role in providing guidance and oversight of our grants, finances and program activities. We truly appreciate their contributions to our work and to our mission to improve the health status of our twenty-five MetroWest communities.

William Graham  
*Chair, Board of Trustees*

Martin Cohen  
*President/CEO*



# EQUITY IN ACTION

The past year has been a challenging one. The COVID-19 pandemic has tested our collective health in ways that have both shined a light on incredible community strengths while also highlighting huge inequities across our region. The disproportionate impact of COVID-19 across low-income and marginalized communities was not inevitable. It was the logical consequence of decades of policies and practices that have led to disparities in health and wellness.

**The foundation's commitment to health equity has always been core to our mission and our work in the community.**

Over the past year, we have focused this work in new ways that respond directly to the effects of the pandemic and push the region toward a more equitable future.



# Equity in Action

Our health equity approach has been multi-dimensional, using many of the social impact tools available to us. Here is a sampling of our work over the past year.

DATA GATHERING  
AND ANALYSIS

GRANTMAKING IN  
HEALTH EQUITY

TRAINING FOR EQUITY

EDUCATING THE COMMUNITY

BUILDING A SKILLED AND  
DIVERSE WORKFORCE

CONVENING LEADERS  
ON PRESSING ISSUES

# Grantmaking in Health Equity



\$501,845 in direct funding for health equity initiatives and capacity building projects directly advancing equity in community organizations.

**\$501,845 in direct funding**



# Training for Equity



The foundation funded the launch of the Wayside Equity Center and is underwriting a 12-session series on organizational equity planning and implementation. The virtual workshops are held monthly for staff and volunteers of community-based and municipal agencies in the region. The foundation is also funding individual consultation with Equity Center staff for agencies with more specific needs.

In addition to the new Wayside Training, the foundation's Racial & Ethnic Disparities Workgroup hosted a half-day training on Health Equity 201 with Mo Barbosa of Health Resources in Action. The training highlighted concrete actions that the leadership and staff of community agencies can take to promote equity within their organizations and the community.

**The training highlighted concrete actions that the leadership and staff of community agencies can take to promote equity within their organizations and the community.**



“

The COVID-19 pandemic was very scary for our community members and even more concerning was taking an experimental vaccine as a possible remedy for prevention. Anxiety was especially high in our immigrant community. It was clear to me that the “get the vaccine” message needed to come from trusted leaders in the community so using known school and faith leaders was why we recommended the foundation profile them on video with messages in English, Spanish, and Portuguese. The campaign made a huge difference especially for those families that needed that extra bit of encouragement.”

**LINO COVARRUBIAS**

*CHIEF EXECUTIVE OFFICER,  
JEWISH FAMILY SERVICE OF METROWEST*



# Educating the Community

---



When vaccines became available, the foundation partnered with community leaders to produce and distribute short videos offering vaccine facts and encouraging residents to get vaccinated. Videos, featuring local influencers, were produced in English, Spanish and Portuguese. They were used by community agencies and local public health departments, as well as posted on our website and social media to encourage vaccinations.



# Building a Skilled and Diverse Workforce through Scholarships and Internships

---



The foundation continues to offer scholarships for MetroWest residents pursuing degrees in nursing, social work, psychology, medicine and other related medical/clinical fields. The goal is to alleviate some of the cost burden making higher education more accessible to those pursuing careers in the health field and attracting diverse candidates from across the region. The foundation awarded 37 scholarships this past fiscal year, with 44% of recipients being people of color. Recipients were also fluent in at least 7 languages other than English.

**37 scholarships awarded—44% of recipients being people of color**

This past year the foundation launched the MetroWest Health Internship Program, offering stipends for graduate level interns at municipal or non-profit agencies working in a clinical capacity or to improve community health. The goal of the internship program is to increase the diversity of interns available to agencies and attract and keep the next generation of public health and health care staff in the region.

## Convening Leaders on Pressing Issues with an Equity Focus

---



The pandemic highlighted the collective power of community leaders from different sectors coming together around immediate and longer-term needs.

The foundation used its convening role to bring a number of groups together to address issues of concern with a focus on equity. This included a session for local public health directors as well as leadership staff from large non-profit agencies on Racism as a Public Health Emergency with Dr. Ada Amobi of Mass General Hospital and JSI Research & Training Institute.

**The foundation used its convening role to bring a number of groups together to address issues of concern with a focus on equity.**

We convened leaders from non-profit and municipal agencies working in all aspects of housing to identify needs and resources for families and individuals facing eviction, as well as the changing landscape of state and federal funding for rental and mortgage assistance. Council on Aging directors and others working with older adults in the community also came together for a series facilitated by Dr. Caitlin Coyle and her team from the UMass Boston Gerontology Institute on innovative ways to address social isolation among older adults during the pandemic. The foundation also provided grant funding for programs to increase technology access for older adults.

“

During this time of ever-changing realities, local health departments turned to each other with questions, new ideas, shared frustrations, and ongoing encouragement. The COVID-19 pandemic brought long standing structural and systemic inequities into clear view. We rapidly found the highest burden of disease rested with our residents that had few resources to manage through a pandemic. Funding support and flexibility from the MetroWest Health Foundation made an important contribution to needs as they arose and evolved.”

**ALEX DEPALO**

*DIRECTOR OF PUBLIC HEALTH,  
CITY OF FRAMINGHAM*



# Data Gathering and Analysis



Data is a powerful tool to identify and highlight disparities. The foundation's strategy for collecting and sharing health data through an equity lens has evolved over time. In the early stages of the pandemic, we used town-level demo-

graphic data to tailor our funding strategy to better support communities with greater prevalence of at-risk populations, such as Hispanic/Latino residents, people of color, and people in poverty. Staff reviewed weekly town-level data on COVID incidence and unemployment rates to understand who was being most impacted by the downstream economic effects of the pandemic; COVID incidence, testing, and unemployment data were made accessible via a dashboard on our website. As the pandemic progressed and vaccines became available, the foundation developed an interactive dashboard with town-level data on who received the vaccine by age, race, and sex, and compared that to population sizes. This tool allowed public health practitioners to identify gaps and groups exhibiting potential vaccine hesitancy or access issues.

**This tool allowed public health practitioners to identify gaps and groups exhibiting potential vaccine hesitancy or access issues.**



## MORE TO COME

Our work on health equity will continue to evolve as we and our community partners strive to create more equitable systems of care throughout the region. We see this work as essential to addressing the unmet health needs of our MetroWest community.



“

While COVID-19 and the death of George Floyd helped highlight the inequities our clients experience, these have always been true. We aim for behavioral health and public health leaders to be agents of change with antiracism as our baseline and collaboration as our method. To us that means to unpack and investigate the ways oppression exists within us and within our systems. We want to stop talking about doing the right things and start doing the right things.”

**GUIMEL DECARVALHO**

*VICE PRESIDENT OF PEOPLE AND CULTURE &  
CHIEF DIVERSITY OFFICER, WAYSIDE YOUTH  
& FAMILY SUPPORT NETWORK*





# Grants

## BASIC HEALTH NEEDS

Advocates, Inc.

Behavioral Health

**\$225,000.00**

Edward M. Kennedy  
Community Health  
Center, Inc.

Oral Health

**\$150,000.00**

Edward M. Kennedy  
Community Health  
Center, Inc.

Primary Medical Care

**\$525,000.00**

Edward M. Kennedy  
Community Health  
Center, Inc.

Prescription Assistance

**\$450,000.00**

Health Care For All

Insurance Enrollment

**\$75,000.00**

Latino Health Insurance  
Program, Inc.

Insurance Enrollment

**\$150,000.00**

Lovin' Spoonfuls, Inc.

Food Insecurity

**\$150,000.00**

MetroWest Legal Services

Medical-Legal Partnership

**\$225,000.00**

Riverside Community Care

Behavioral Health

**\$150,000.00**

South Middlesex  
Opportunity Council, Inc.

Behavioral Health

**\$225,000.00**

South Middlesex  
Opportunity Council, Inc.

Homelessness

**\$225,000.00**

Wayside Youth & Family  
Support Network, Inc.

Behavioral Health

**\$225,000.00**

## **CAPACITY BUILDING**

### **Lovin' Spoonfuls, Inc.**

To expand deliveries  
in the MetroWest area.  
**\$150,000.00**

### **Massachusetts Bay Community College**

To develop a Patient  
Simulation Center.  
**\$500,000.00**

## **COMMUNITY HEALTH INNOVATION**

### **Advocates, Inc.**

To develop a Health and  
Social Service Hub to connect  
healthcare and social services.  
**\$399,996.00**

### **Jewish Family Service of Metrowest**

To assist new immigrant  
families in Framingham.<sup>1</sup>  
**\$24,101.31**

### **MetroWest Nonprofit Network, Inc.**

To support the Voices of  
the Community project.<sup>1</sup>  
**\$214,797.60**

## **COVID-19 RELATED GRANTS**

### **Advanced Math and Science Academy Charter School**

To provide emotional support  
services for those impacted  
by COVID.  
**\$30,000.00**

### **Advocates, Inc.**

To provide emotional support  
services for those impacted  
by COVID.  
**\$29,962.24**

### **Advocates, Inc.**

To address social isolation  
among older adults.  
**\$23,800.00**

### **Ashland Council on Aging**

To address social isolation  
among older adults.  
**\$24,000.00**

### **Beth Israel Lahey Health at Home**

To provide emotional support  
services for those impacted  
by COVID.  
**\$29,992.00**

### **Boys & Girls Club of MetroWest**

To provide emotional support  
services for those impacted  
by COVID.  
**\$30,000.00**

### **Framingham Council on Aging**

To address social isolation  
among older adults.  
**\$25,000.00**

### **Framingham Health Department**

To improve public  
health capacity.  
**\$30,000.00**

### **Framingham Public Schools**

Emergency grant  
**\$17,000.00**

### **Framingham Public Schools**

To provide emotional support  
services for those impacted  
by COVID.  
**\$100,000.00**

### **Franklin Council on Aging**

To address social isolation  
among older adults.  
**\$4,599.30**

### **Hockomock Area YMCA - Bernon Family Branch**

Emergency grant  
**\$7,500.00**

### **Holliston Council on Aging**

To address social isolation  
among older adults.  
**\$26,153.69**

**Hopkinton Health  
Department**

To improve public  
health capacity.

**\$19,800.00**

**Horace Mann Educational  
Associates, Inc.**

Emergency grant

**\$3,483.00**

**Hudson Health  
Department**

To provide emotional support  
services for those impacted  
by COVID.

**\$30,000.00**

**Hudson Health  
Department**

To improve public  
health capacity.

**\$20,000.00**

**Jewish Family Service  
of Metrowest**

Emergency grant

**\$10,000.00**

**Jewish Family Service  
of Metrowest**

To address social isolation  
among older adults.

**\$29,756.25**

**Massachusetts  
Association for the Blind**

To address social isolation  
among older adults.

**\$21,347.00**

**Massachusetts Bay  
Community College**

To provide emotional support  
services for those impacted  
by COVID.

**\$30,000.00**

**Mental Health  
Collaborative, Inc**

To provide emotional support  
services for those impacted  
by COVID.

**\$14,550.00**

**MetroWest YMCA**

To address social isolation  
among older adults.

**\$25,000.00**

**Natick Health  
Department**

To improve public  
health capacity.

**\$30,000.00**

**Needham Community  
Council Food Pantry**

To address social isolation  
among older adults.

**\$25,000.00**

**Needham Public  
Health Division**

To improve public  
health capacity.

**\$20,000.00**

**New Hope, Inc.**

To provide emotional support  
services for those impacted  
by COVID.

**\$30,000.00**

**Northborough Council  
on Aging**

To address social isolation  
among older adults.

**\$9,268.00**

**RIA House Inc.**

Emergency grant

**\$2,500.00**

**Sherborn Council  
on Aging**

To address social isolation  
among older adults.

**\$16,000.00**

**South Middlesex  
Opportunity Council, Inc.**

Emergency grant

**\$85,000.00**

**South Middlesex  
Opportunity Council, Inc.**

To provide emotional support  
services for those impacted  
by COVID.

**\$25,783.00**



### SPARK Kindness, Inc.

To provide emotional support services for those impacted by COVID.

**\$24,474.50**

### Sudbury Board of Health

To improve public health capacity.

**\$20,000.00**

### Thrive, Support and Advocacy

To address social isolation among older adults.

**\$17,160.00**

### Wayside Youth & Family Support Network, Inc.

Emergency grant

**\$10,000.00**

### Wellesley Council on Aging

Emergency grant

**\$10,000.00**

### Westborough Youth & Family Services

To provide emotional support services for those impacted by COVID.

**\$19,000.00**

## HEALTH EQUITY

### Health Care For All

To offer a health justice academy.

**\$30,000.00**

### Learning Center for the Deaf

To develop a strategic plan to advance racial equity, diversity, and inclusion.

**\$30,000.00**

### MetroWest YMCA

To support cultural competency training.

**\$30,000.00**



**Natick Health  
Department**

To develop and implement  
a health equity plan and  
training process.<sup>2</sup>

**\$30,000.00**

**OUT MetroWest**

To offer social education  
programs for LGBTQ+ youth.

**\$24,146.00**

**Wayside Youth & Family  
Support Network, Inc.**

To provide diversity, equity,  
and inclusion training.

**\$21,948.00**

**Wayside Youth & Family  
Support Network, Inc.**

To establish an Equity  
Training Center.

**\$29,769.50**

**RESPONSIVE**

**A Place To Turn**

Food Pantry<sup>2</sup>

**\$50,000.00**

**Family Promise**

**MetroWest**

Emergency shelter support.<sup>2</sup>

**\$35,000.00**

**Jewish Family Service  
of Metrowest**

To translate training materials  
to be used for an active  
bystander program.<sup>1</sup>

**\$17,500.00**

**MetroWest Legal Services**

To help low-income immigrants  
maintain access to health care.

**\$19,584.00**

**Natick Service  
Council, Inc.**

Food Pantry<sup>2</sup>

**\$50,000.00**

**Planned Parenthood**

**League of Massachusetts**

To provide integrated mental  
health services for transgender  
and non-binary patients.

**\$20,000.00**

**Town of Natick**

To support the Natick  
Trails project.<sup>2</sup>

**\$75,000.00**

**WORKFORCE ENHANCEMENT**

**Internship Stipends (12)**

**\$90,000**

**NURSING SCHOLARSHIPS (29)**

**\$53,000**

**MEDICAL CLINICAL  
SCHOLARSHIPS (8)**

**\$16,000**

<sup>1</sup> From the Framingham  
Union Grants Panel

<sup>2</sup> From the Leonard Morse  
Grants Panel

# Governance

## **BOARD OF TRUSTEES**

Mari Brennan Barrera  
John Corron, *Treasurer*  
Lino Covarrubias  
Anna Carollo Cross, Ed.D.  
*Vice Chair*  
Alan Geller  
Carol Gloff, Ph.D., *Clerk*  
Bill Graham, Esq., *Chair*  
Kathleen Herrman, Psy.D.  
James Hicks  
William Iberg  
John Krikorian, M.D.  
Coleen Toronto, Ph.D.

## **FRAMINGHAM UNION GRANTS PANEL**

Karin Agte  
Betsy Cross  
Carol Phalen  
Molly Ruddock  
Viviana Vilches

## **LEONARD MORSE GRANT PANEL**

Alissa Caron  
Catherine Liang  
Shao-Hsien Liu, Ph.D.  
David Mangan, Ph.D.  
Virginia Seery

## **DISTRIBUTION COMMITTEE**

Mari Brennan Barrera  
Lino Covarrubias  
Kevin Foley  
Alan Geller, *Chair*  
Bill Graham, Esq.  
Kathleen Herrman, Psy.D.  
John Krikorian, M.D.  
Regina Marshall, Esq.  
Dana Neshe  
Betsy Rigby  
Laura Senier, Ph.D.  
Susan Seppa  
Claudia Trevor-Wright

## **AUDIT COMMITTEE**

Robert Awkward, Ph.D.  
John Corron  
Lino Covarrubias  
William Iberg, *Chair*  
Frank C. Jenkins  
Meyer Levy, CPA  
William G. McCarthy, CPA  
Susan Seppa, CPA

## **INVESTMENT COMMITTEE**

James J. Connolly  
John Corron, *Chair*  
Kevin Foley  
William Iberg  
Frank C. Jenkins  
Meyer Levy  
Thomas Moore  
Adam Rogers  
Jeffrey Titus  
David Upton  
J. Ben Williams

## **SCHOLARSHIP COMMITTEE**

Carol Gloff, Ph.D.  
Coleen Toronto, Ph.D., *Chair*  
Viviana Vilches

## **PERSONNEL COMMITTEE**

Mari Brennan Barrera  
Anna Carollo Cross, Ed.D.  
Bill Graham, Esq., *Chair*  
James Hicks

## **NOMINATING COMMITTEE**

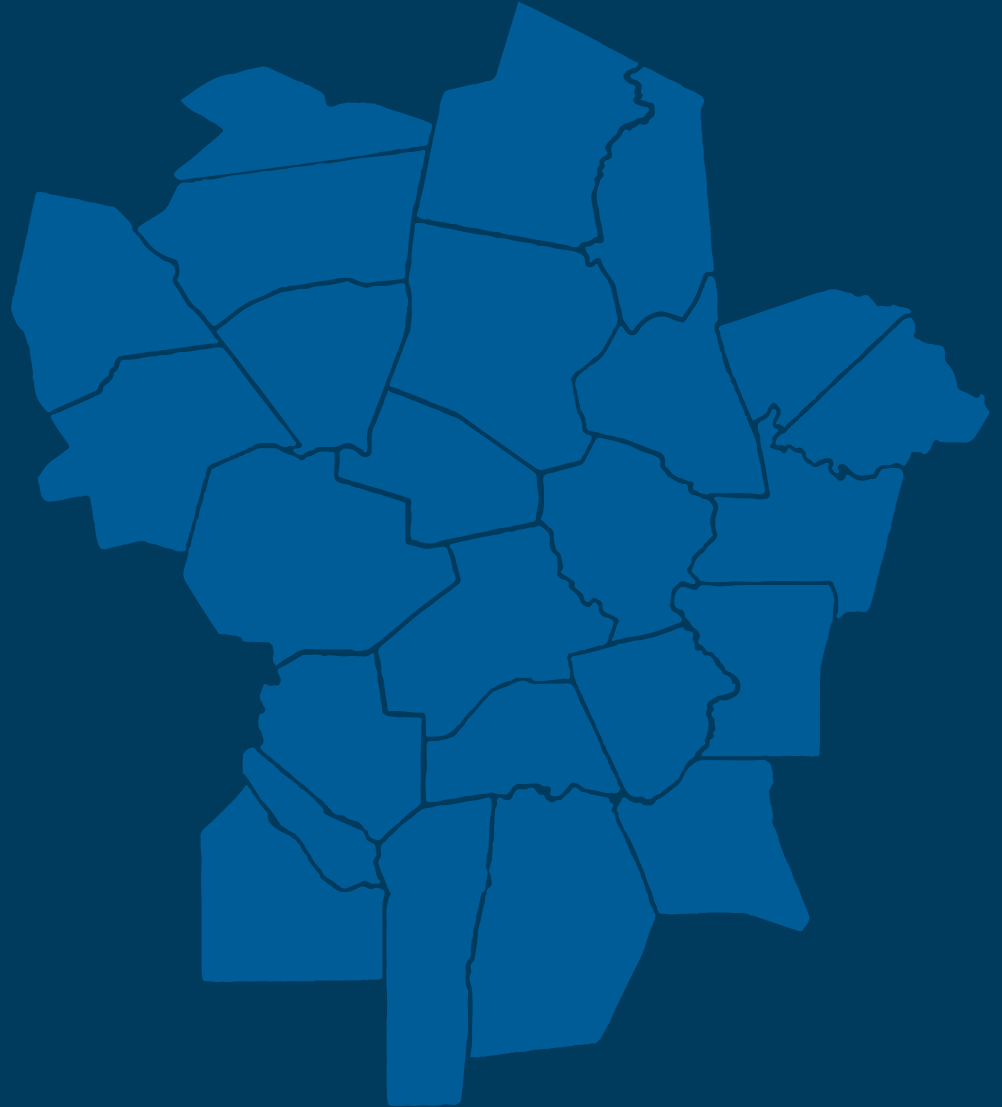
Anna Carollo Cross, Ed.D., *Chair*  
Carol Gloff, Ph.D.  
James Hicks  
John Krikorian, M.D.

## **STAFF**

Kate Baker, *Policy Analyst*  
Martin D. Cohen, *President/CEO*  
Rebecca Donham, *Senior  
Program Officer*  
Rebecca Gallo, *Senior  
Program Officer*  
Cathy Glover, *Grants  
Management Director*

**Our mission is to improve the health status of the community, its individuals, and families through informed and innovative leadership.**

We serve the communities of: Ashland, Bellingham, Dover, Framingham, Franklin, Holliston, Hopedale, Hopkinton, Hudson, Marlborough, Medfield, Medway, Mendon, Milford, Millis, Natick, Needham, Norfolk, Northborough, Sherborn, Southborough, Sudbury, Wayland, Wellesley, and Westborough.





# Financials

## STATEMENT OF FINANCIAL POSITION SEPTEMBER 30, 2021

(with summarized comparative totals as of September 30, 2020)

ASSETS	2021	2020
Cash and Cash Equivalents	\$2,359,462	\$2,552,161
Investments	\$111,641,824	\$95,365,148
Beneficial Interests in Perpetual Trusts	\$8,405,193	\$7,390,013
Other Assets	\$90,598	\$118,014
<b>TOTAL ASSETS</b>	<b>\$122,497,077</b>	<b>\$105,425,336</b>
<b>LIABILITIES &amp; NET ASSETS</b>	<b>2021</b>	<b>2020</b>
Accrued Expenses and Other	\$1,959,733	\$2,197,270
Grants Payable	\$2,859,498	\$747,939
Deferred Excise Taxes	\$556,434	\$373,417
<b>TOTAL LIABILITIES</b>	<b>\$5,375,665</b>	<b>\$3,318,626</b>
<b>Net Assets</b>		
<i>Without donor restrictions:</i>		
General purpose funds	\$63,656,880	\$54,372,125
Grants Panels	\$32,647,340	\$30,073,657
<b>TOTAL WITHOUT DONOR RESTRICTIONS</b>	<b>\$96,304,220</b>	<b>\$84,445,782</b>
<i>With donor restrictions:</i>		
Purpose restricted, including Grants Panel funds:		
Expendable	\$7,929,504	\$6,457,982
Endowments	\$4,482,495	\$3,812,933
Beneficial interests in perpetual trusts	\$8,405,193	\$7,390,013
<b>TOTAL WITH DONOR RESTRICTIONS</b>	<b>\$20,817,192</b>	<b>\$17,660,928</b>
<b>TOTAL NET ASSETS</b>	<b>\$117,121,412</b>	<b>\$102,106,710</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$122,497,077</b>	<b>\$105,425,336</b>

## STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS SEPTEMBER 30, 2021

(with summarized comparative totals for the year ended September 30, 2020)

REVENUES	2021	2020
Investment return, net	\$20,794,250	\$5,908,444
Income from outside trusts and other	\$305,108	\$303,816
Net gains (losses) on beneficial interests in perpetual trusts	\$1,015,180	\$45,636
Net assets released from purpose restrictions	—	—
<b>TOTAL REVENUES</b>	<b>\$22,114,538</b>	<b>\$6,257,896</b>
<b>OPERATING EXPENSES</b>	<b>2021</b>	<b>2020</b>
<b>Program services</b>		
Community Education and Advocacy	\$456,138	\$483,974
Grant and related	\$5,934,356	\$1,988,219
<b>TOTAL PROGRAM SERVICES</b>	<b>\$6,390,494</b>	<b>\$2,472,193</b>
<b>Management and general</b>	<b>\$709,342</b>	<b>\$414,526</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>\$7,099,836</b>	<b>\$2,886,719</b>
Changes in net assets	\$15,014,702	\$3,371,177
<b>NET ASSETS, BEGINNING OF YEAR</b>	<b>\$102,106,710</b>	<b>\$98,735,533</b>
<b>NET ASSETS, END OF YEAR</b>	<b>\$117,121,412</b>	<b>\$102,106,710</b>

The Board of Trustees has engaged AAFCPAs of Westborough, Massachusetts to perform the annual audit.

A copy of their complete audit report is available for review from the Foundation.

# GET INVOLVED

## APPLYING FOR GRANTS

The MetroWest Health Foundation makes grants to non-profit 501(c)(3) community organizations and governmental entities. Requests for grant proposals are issued at various times throughout the year and address specific health issues and areas of concern to the foundation as identified through community needs assessments. The foundation also provides scholarships for individuals interested in pursuing formal educational programs in nursing, medicine, and other health professions. Organizations interested in applying for grants should submit a concept paper to the foundation in advance of a full proposal.

**For more information on applying for a grant or scholarship, call us at 508.879.7625 or visit our website at [www.mwhealth.org](http://www.mwhealth.org).**

## UNDERSTANDING COMMUNITY HEALTH NEEDS

Since our mission is to address the unmet health needs of the communities in the MetroWest area, we invite individuals and organizations with information or data concerning the current or projected health needs of the area to share them with the foundation. This information will help us shape our grantmaking activities and aid in the development of funding priorities for the foundation and its grants panels.

## MAKING A GIFT TO THE FOUNDATION

You can support the work of the MetroWest Health Foundation by making a tax-deductible contribution or by including the foundation in your estate planning.

The foundation can assist you in planning a bequest or charitable donation to benefit the health needs of your community. For more information or assistance, contact us at 508.879.7625.









**METROWEST  
HEALTH  
FOUNDATION**

161 Worcester Rd, Ste. 202  
Framingham, MA 01701  
**PHONE** 508-879-7625  
**EMAIL** [info@mwhealth.org](mailto:info@mwhealth.org)  
[www.mwhealth.org](http://www.mwhealth.org)

**Design:** J Sherman Studio  
**Photography:** John Gillooly/PEI  
(pages 4, 7, 9, 11, 12, inside back cover)