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  Martin Cohen
Chair, Board of Trustees  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.
Grantmaking in Health Equity

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

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 demographic 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.¹
$24,101.31

MetroWest Nonprofit Network, Inc.
To support the Voices of the Community project.¹
$214,797.60

Ashland Council on Aging
To address social isolation among older adults.
$24,000.00

Framingham Public Schools
Emergency grant
$17,000.00

COVID-19 RELATED GRANTS

Advanced Math and Science Academy Charter School
To provide emotional support services for those impacted by COVID.
$30,000.00

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.
$4,599.30

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.
$5,000.00

Framingham Health Department
To improve public health capacity.
$30,000.00

Franklin Council on Aging
To address social isolation among older adults.
$4,599.30

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

Jewish Family Service of Metrowest
Jewish Family Service of Metrowest
To address social isolation among older adults.
$29,756.25

Massachusetts Association for the Blind
Massachusetts Association for the Blind
To address social isolation among older adults.
$21,347.00

Massachusetts Bay Community College
Massachusetts Bay Community College
To provide emotional support services for those impacted by COVID.
$30,000.00

Mental Health Collaborative, Inc
Mental Health Collaborative, Inc
To provide emotional support services for those impacted by COVID.
$14,550.00

MetroWest YMCA
MetroWest YMCA
To address social isolation among older adults.
$25,000.00

Natick Health Department
Natick Health Department
To improve public health capacity.
$30,000.00

Needham Community Council Food Pantry
Needham Community Council Food Pantry
To address social isolation among older adults.
$25,000.00

Needham Public Health Division
Needham Public Health Division
To address social isolation among older adults.
$20,000.00

New Hope, Inc.
New Hope, Inc.
To provide emotional support services for those impacted by COVID.
$30,000.00

Northborough Council on Aging
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
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.
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
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Description</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natick Health Department</td>
<td>To develop and implement a health equity plan and training process.²</td>
<td>$30,000.00</td>
</tr>
<tr>
<td>OUT MetroWest</td>
<td>To offer social education programs for LGBTQ+ youth.</td>
<td>$24,146.00</td>
</tr>
<tr>
<td>Wayside Youth &amp; Family Support Network, Inc.</td>
<td>To provide diversity, equity, and inclusion training.</td>
<td>$21,948.00</td>
</tr>
<tr>
<td>Wayside Youth &amp; Family Support Network, Inc.</td>
<td>To establish an Equity Training Center.</td>
<td>$29,769.50</td>
</tr>
<tr>
<td>Jewish Family Service of Metrowest</td>
<td>To translate training materials to be used for an active bystander program.¹</td>
<td>$17,500.00</td>
</tr>
<tr>
<td>MetroWest Legal Services</td>
<td>To help low-income immigrants maintain access to health care.</td>
<td>$19,584.00</td>
</tr>
<tr>
<td>Natick Service Council, Inc.</td>
<td>Food Pantry²</td>
<td>$50,000.00</td>
</tr>
<tr>
<td>Planned Parenthood League of Massachusetts</td>
<td>To provide integrated mental health services for transgender and non-binary patients.</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Town of Natick</td>
<td>To support the Natick Trails project.²</td>
<td>$75,000.00</td>
</tr>
</tbody>
</table>

**Workforce Enhancement**

| Internship Stipends (12)                          | $90,000                               |

**Nursing Scholarships (29)**

| $53,000                                        |

**Medical Clinical Scholarships (8)**

| $16,000                                         |

¹ From the Framingham Union Grants Panel  
² From the Leonard Morse Grants Panel
Governance

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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)

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$2,359,462</td>
<td>$2,552,161</td>
</tr>
<tr>
<td>Investments</td>
<td>$111,641,824</td>
<td>$95,365,148</td>
</tr>
<tr>
<td>Beneficial Interests in Perpetual Trusts</td>
<td>$8,405,193</td>
<td>$7,390,013</td>
</tr>
<tr>
<td>Other Assets</td>
<td>$90,598</td>
<td>$118,014</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$122,497,077</td>
<td>$105,425,336</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; NET ASSETS</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accrued Expenses and Other</td>
<td>$1,959,733</td>
<td>$2,197,270</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>$2,859,498</td>
<td>$747,939</td>
</tr>
<tr>
<td>Deferred Excise Taxes</td>
<td>$556,434</td>
<td>$373,417</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$5,375,665</td>
<td>$3,318,626</td>
</tr>
</tbody>
</table>

Net Assets

Without donor restrictions:
- General purpose funds: $63,656,880, $54,372,125
- Grants Panels: $32,647,340, $30,073,657

TOTAL WITHOUT DONOR RESTRICTIONS: $96,304,220, $84,445,782

With donor restrictions:
- 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

TOTAL WITH DONOR RESTRICTIONS: $20,817,192, $17,660,928

TOTAL NET ASSETS: $117,121,412, $102,106,710

TOTAL LIABILITIES AND NET ASSETS: $122,497,077, $105,425,336

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
SEPTEMBER 30, 2021
(with summarized comparative totals for the year ended September 30, 2020)

<table>
<thead>
<tr>
<th>REVENUES</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment return, net</td>
<td>$20,794,250</td>
<td>$5,908,444</td>
</tr>
<tr>
<td>Income from outside trusts and other</td>
<td>$305,108</td>
<td>$303,816</td>
</tr>
<tr>
<td>Net gains (losses) on beneficial interests in perpetual trusts</td>
<td>$1,015,180</td>
<td>$45,636</td>
</tr>
<tr>
<td>Net assets released from purpose restrictions</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td>$22,114,538</td>
<td>$6,257,896</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPERATING EXPENSES</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Education and Advocacy</td>
<td>$456,138</td>
<td>$483,974</td>
</tr>
<tr>
<td>Grant and related</td>
<td>$5,934,356</td>
<td>$1,988,219</td>
</tr>
<tr>
<td><strong>TOTAL PROGRAM SERVICES</strong></td>
<td>$6,390,494</td>
<td>$2,472,193</td>
</tr>
<tr>
<td>Management and general</td>
<td>$709,342</td>
<td>$414,526</td>
</tr>
<tr>
<td><strong>TOTAL OPERATING EXPENSES</strong></td>
<td>$7,099,836</td>
<td>$2,886,719</td>
</tr>
<tr>
<td>Changes in net assets</td>
<td>$15,014,702</td>
<td>$3,371,177</td>
</tr>
<tr>
<td><strong>NET ASSETS, BEGINNING OF YEAR</strong></td>
<td>$102,106,710</td>
<td>$98,735,533</td>
</tr>
<tr>
<td><strong>NET ASSETS, END OF YEAR</strong></td>
<td>$117,121,412</td>
<td>$102,106,710</td>
</tr>
</tbody>
</table>

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.

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.