through a wider lens

INVESTING IN THE SOCIAL DETERMINANTS OF HEALTH
We welcome Phillip González as the foundation’s new President & CEO.

Phillip González comes to the foundation with over twenty years of experience in health philanthropy. Prior to joining the foundation, he was the Director of Community Investments at Point 32 Health Foundation where he led their community engagement and grantmaking strategies.

Before Point 32, Phillip was program director at Community Catalyst, Inc., a national advocacy organization which builds consumer participation in the health care system. There he directed the Roadmaps to Health Community Grants program funded by the Robert Wood Johnson Foundation. Phillip also worked as director of grantmaking for the Blue Cross Blue Shield of Massachusetts Foundation where he was directly involved in the implementation of Massachusetts’ pioneering 2006 health care reform law.

An active volunteer, Phillip has received numerous awards for his community service and leadership. In 2010 he was part of the inaugural cohort for the Terrance Keenan Institute for Emerging Leaders in Health Philanthropy supported by Grantmakers in Health. He holds a master’s degree in public administration from the University of Massachusetts Boston, and a bachelor’s degree from the University of Vermont.
Good health is a multidimensional concept that goes beyond the absence of disease.

Various dimensions contribute to a holistic understanding of an individual’s well-being such as genetics, individual behavior, access to quality health care, and the social determinants of health—those conditions that influence health and well-being both directly and indirectly—such as racism, income, education, and housing.

For the foundation, our work has always included a focus on the social determinants of health as understanding and addressing these dimensions are crucial for developing effective public health policies and interventions that promote health equity and improve population health. In this, our 24th annual report to the community, you can see how our multiple grantmaking and program strategies across these dimensions are leading to real systems change, while also providing needed support to individuals and families.

On behalf of the foundation’s board of trustees, I want to thank our grantees, community partners, and our committee and panel members who support our work. Your efforts allow us to fulfill our mission of “improving the health status of the community, its individuals and families” every day. I also want to extend my sincere thanks to Cathy Glover and Marty Cohen for their incredible leadership over the last 24 years. Their work has enabled the foundation to accomplish so much across the region. I also want to join with my fellow trustees in welcoming our new President & CEO, Phillip González. Phillip’s expertise in health philanthropy and his commitment to health equity make him the ideal choice to lead us as we begin our second quarter century!

Anna Cross
Chair, Board of Trustees

130
new grants awarded in FY2023

57
MetroWest residents receive a health profession scholarship

Over
$3.5M
provided in grant funding
Social determinants of health are the nonmedical factors that influence health outcomes. They are the conditions in which people are born, grow, work, live, and age, and the wider set of forces and systems shaping the conditions of daily life.

—Centers for Disease Control
We are fortunate to live in a region with world-class healthcare facilities as access to quality health care is important for a healthy life.

Yet, the social determinants of health—economic stability, education, food, neighborhood and environment, and social and community context—have a far greater impact on individual and community health.

In the wake of the COVID pandemic and rising costs of living in the region, families and individuals are finding that it is these social determinants that are becoming increasingly challenging. Over the past year, the foundation has responded to these issues through immediate assistance at points of crisis and high need, and through strategic investments in longer-term collaborative approaches that can foster systems change in the region.
The foundation is focused on place-based initiatives implementing cross-sector strategies to improve health in neighborhoods or communities.

For example, with ongoing support from the foundation, the Voices of the Community project in South Framingham serves to lift up the strengths and challenges of residents, and work with them to develop interventions to improve health. This partnership has led to training and coaching staff at local social service agencies to engage with and listen to residents as they design and improve programs. It has also increased access to basic needs, including healthcare through community education and outreach.
Another place-based initiative is the MetroWest Care Connection. Here the foundation helped launch and is supporting systems change by bringing health and social service agencies together to collectively address the needs of individuals and families. By breaking down traditional “silos” that make accessing services difficult to navigate, this “hub” approach is designed to create a front door to an array of services and supports. Staff are able to assist those seeking care find the most appropriate fit as quickly as possible. Stuck or problem cases are discussed in weekly team meetings where multiple nonprofit and government agencies convene to find immediate solutions for those in need.
Successful systemic change initiatives can take months and, often years to effectively change the everyday lives of those most negatively impacted by lack of access to nutritious food, adequate housing, transportation, and safe places to work and play.

Given this reality, the foundation is also committed to funding projects and agencies that provide immediate assistance. This has included rapid funding to meet needs in a crisis, such as funding for short-term medical needs of migrant families living in hotels, or assistance with ongoing basic needs such as healthy food or housing.
Food insecurity

The foundation funds immediate food security needs through investments that increase access to healthy and culturally relevant foods in pantries.

The number of MetroWest residents in need of assistance with food is rising, which puts additional pressure on local food programs. To address this rising need, the foundation made a leading gift to A Place to Turn to renovate and expand their pantry. The pantry is now able to serve more people in a dignified and efficient way. And, through a collaboration with other MetroWest area funders, the foundation was able to support a second MetroWest area route by Lovin’ Spoonfuls, an organization that facilitates the rescue and distribution of healthy, fresh food to area pantries and food programs.

Creating a more sustainable and equitable local food system will have a significant impact on food security and nutrition. The foundation has invested in the MetroWest Food Collaborative, which brings together professionals and community members to advocate, educate and collaboratively improve equity and access to nutritious foods.
The high cost and lack of affordable housing units in the region has a far-reaching impact.

High housing costs mean less money to pay for other necessities. To understand this problem in more detail, the foundation issued *Shut Out: Understanding the affordable housing crisis in MetroWest*. This report documents increased rental and home ownership costs that make it difficult for families to pay for other basic needs, like food, transportation, and healthcare.

With concern over increased evictions following the lifting of the COVID public health emergency declaration, the foundation regularly convened nonprofit and municipal leaders to share best practices for helping families facing eviction. These online meetings helped facilitate collaboration and information sharing. This work is now being formalized through a housing coalition to address housing security issues in the region led by the *MetroWest Care Connection*. 
The foundation has also provided direct funding to help families faced with eviction through legal assistance (MetroWest Legal Service) and mediation (MetroWest Mediation Services), as well as case management and coaching for families at risk of losing their housing (Family Promise MetroWest).

Support has also been provided to seed innovative models such as the Framingham Older Adult Home Share Program run by Jewish Family Service of Metrowest in partnership with the Framingham Council on Aging. This program allows older adults who have space in their homes and who need or want extra income and/or companionship to be paired with those seeking affordable housing. The model addresses the lack of affordable housing, as well as social isolation often experienced by older adults.
While preventing housing loss is ideal, there are some in our community experiencing homelessness.

Those who have been in the situation for an extended period of time are often mistrustful and more challenging to engage. With support from the foundation, the South Middlesex Opportunity Council recently opened a Day Center to respond to immediate needs for food, laundry, and a safe, warm space during the day. While staff meet guests’ immediate needs, they are also working on long-term trust building and connections that can help lead folks out of homelessness.
Grants

**BASIC HEALTH NEEDS**

**MetroWest Free Medical Program**  
To support basic health needs—primary care.  
$100,000

**CAPACITY BUILDING**

**Ashland Health Department**  
To vaccinate school age children in the region.  
$20,000

**Bethany Health Care Center**  
To address staffing challenges.  
$20,000

**Edward M. Kennedy Community Health Center, Inc.**  
To support staff training for insurance enrollment services.  
$20,000

**Franklin Food Pantry**  
To undertake a strategic planning process.  
$20,000

**Hockomock Area YMCA–Bernon Family Branch**  
To provide Mental Health First Aid Training for staff.  
$20,000

**Medway Public Schools**  
To train staff to identify and refer students with mental health issues.  
$18,631

**Project Just Because**  
To purchase refrigeration units for perishable pantry foods.  
$14,653

**Town of Franklin**  
To purchase food lockers to maximize user choice.  
$10,000

**Town of Natick**  
To conduct cardiac screening of public safety personnel.  
$64,500

**COMMUNITY HEALTH INNOVATION**

**Advocates, Inc.**  
To support MetroWest Care Connection.  
$483,091

**Amazing Things Arts Center, Inc.**  
To support the Voices of the Community project.  
$125,000

**Education Development Center, Inc.**  
To identify innovative strategies for schools to promote digital wellness and improved mental health among girls.  
$50,000

**South Middlesex Opportunity Council, Inc.**  
To support a Day Center for vulnerable unhoused populations.  
$49,984
SPARK Kindness, Inc.
To develop an Identity Based Anti-Bullying coalition.2
$26,022

COMMUNITY PUBLIC HEALTH INTERVENTIONS

Health Care For All
To conduct a COVID booster vaccine outreach and education campaign.1
$30,000

Hudson Health Department
Challenge grant directed to staffing the MetroWest Food Collaborative.
$15,000

MetroWest Legal Services
To assist residents with MassHealth renewals and redeterminations.
$50,000

EMOTIONAL HEALTH OF CHILDREN & YOUTH

Boys & Girls Club of MetroWest
To support the SMART Girls in Action initiative.
$90,000

Hopedale Public Schools
To support a Multi-Tiered System of Support counseling program.
$48,934

MetroWest YMCA
To support trauma-informed teen programming.
$50,000

Norfolk Public Schools
To develop and deliver psychoeducational groups to strengthening the mental health of girls.
$60,000

HEALTH & HOUSING STABILITY

Family Promise MetroWest
To support homelessness prevention and shelter diversion services.2
$75,000

Jewish Family Service of Metrowest
To a pilot program that will connect older adults to housing.1
$50,000

MetroWest Legal Services
To provide legal representation to tenants facing eviction.
$50,000

RIA, Inc.
To support survivor recovery, self-sufficiency, and well-being.
$27,340

HEALTH EQUITY

MetroWest Worker Center
To support a community health worker.
$58,825

Wayside Youth & Family Support Network, Inc.
To provide equity training for grantees.
$27,984
RESPONSIVE

**A Place To Turn**
To support the food pantry.  
$25,000

**Community Foundation for MetroWest**
To support emergency health needs for new immigrants.  
$20,000

**Metro Community Development Corporation**
To support a social work position.  
$20,000

**MetroWest Free Medical Program**
To equip clinical space in Marlborough.  
$14,200

**Milford Public Schools**
To support the emotional health of new immigrant students.  
$19,300

**Natick Service Council, Inc.**
To support development activities.  
$4,750

**Natick Service Council, Inc.**
To support staffing in the food pantry.  
$15,000

**Needham Community Council**
To provide medical transportation for older adults.  
$10,000

**Needham Health and Human Services Department**
To support the supervision and training of clinical staff.  
$4,000

**Open Table, Inc.**
To support food distribution in Hudson.  
$7,000

**Town of Natick**
To provide rail trail access for people with disabilities.  
$20,000

**YOUTH-DRIVEN HEALTH & WELLNESS**

**Needham Public Schools**
To launch a youth led/adult guided Wellness Club.  
$10,000
WORKFORCE ENHANCEMENT

Massachusetts Bay Community College
To support the development of an associate degree program in behavioral health.
$4,840

Internship Stipends (25)
$178,900

SCHOLARSHIPS

Nursing (34)
$132,000

Medical/Clinical (23)
$92,000

1 From the Framingham Union Grants Panel
2 From the Leonard Morse Grants Panel
With gratitude...

At the end of 2023, the foundation said goodbye to two of its founding staff members—Martin Cohen and Cathy Glover.
We thank both Marty and Cathy for their exceptional work over the last 24 years. The foundation, its grantees, and the MetroWest community are stronger because of their contributions.
Governance

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

As of 9/30/23

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# Financials

## Statement of Financial Position

**September 30, 2023**

(with summarized comparative totals as of September 30, 2022)

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$1,543,550</td>
<td>$2,490,256</td>
</tr>
<tr>
<td>Investments</td>
<td>$98,862,588</td>
<td>$90,449,507</td>
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<tr>
<td>Beneficial interests in perpetual trusts</td>
<td>$7,104,287</td>
<td>$6,732,924</td>
</tr>
<tr>
<td>Right-of-Use Asset – Operating, net</td>
<td>$504,523</td>
<td>—</td>
</tr>
<tr>
<td>Other assets</td>
<td>$104,302</td>
<td>$99,540</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>$108,119,250</strong></td>
<td><strong>$99,772,227</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES &amp; NET ASSETS</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liabilities:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accrued expenses and other</td>
<td>$1,554,905</td>
<td>$1,868,556</td>
</tr>
<tr>
<td>Grants payable</td>
<td>$1,657,574</td>
<td>$2,848,435</td>
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<tr>
<td>Operating Lease Liability</td>
<td>$522,052</td>
<td>—</td>
</tr>
<tr>
<td>Deferred excise taxes</td>
<td>$420,949</td>
<td>$281,619</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>$4,155,480</strong></td>
<td><strong>$4,998,610</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General purpose funds</td>
<td>$58,055,237</td>
<td>$51,489,680</td>
</tr>
<tr>
<td>Grants Panels</td>
<td>$27,362,168</td>
<td>$26,124,321</td>
</tr>
<tr>
<td><strong>Total without donor restrictions</strong></td>
<td><strong>$85,417,405</strong></td>
<td><strong>$77,614,001</strong></td>
</tr>
</tbody>
</table>

| With donor restrictions: |            |               |
| Purpose restricted, including Grants Panel funds: |            |               |
| Expendable | $7,367,826 | $6,710,229 |
| Endowments | $4,074,252 | $3,716,463 |
| Beneficial interests in perpetual trusts | $7,104,287 | $6,732,924 |
| **Total with donor restrictions** | **$18,546,365** | **$17,159,616** |
| **Total net assets** | **$103,963,770** | **$94,773,617** |
| **Total liabilities and net assets** | **$108,119,250** | **$99,772,227** |

## Statement of Activities and Changes in Net Assets

**For the year ended September 30, 2023**

(with summarized comparative totals for the year ended September 30, 2022)

<table>
<thead>
<tr>
<th>REVENUES</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income from outside trusts and other</td>
<td>$420,660</td>
<td>$363,718</td>
</tr>
<tr>
<td>Net assets released from purpose restrictions</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>Net gains (losses) on beneficial interests in perpetual trusts</td>
<td>$371,363</td>
<td>$(1,672,269)</td>
</tr>
<tr>
<td>Investment return, net</td>
<td>$12,125,117</td>
<td>$(14,998,796)</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td><strong>($12,917,140)</strong></td>
<td><strong>($16,307,347)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPERATING EXPENSES</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program services:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Education and Advocacy</td>
<td>$479,620</td>
<td>$456,711</td>
</tr>
<tr>
<td>Grant and related</td>
<td>$2,651,225</td>
<td>$5,369,945</td>
</tr>
<tr>
<td><strong>Total program services</strong></td>
<td><strong>$3,130,845</strong></td>
<td><strong>$5,826,656</strong></td>
</tr>
<tr>
<td>Management and general</td>
<td>$596,142</td>
<td>$206,776</td>
</tr>
<tr>
<td><strong>Total operating expenses</strong></td>
<td><strong>$3,726,987</strong></td>
<td><strong>$6,033,432</strong></td>
</tr>
<tr>
<td><strong>Changes in net assets</strong></td>
<td><strong>$9,190,153</strong></td>
<td><strong>($22,340,779)</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year</td>
<td>$94,773,617</td>
<td>$117,114,396</td>
</tr>
<tr>
<td>End of year</td>
<td>$103,963,770</td>
<td>$94,773,617</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

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.

MAKE 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

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.