

METROWEST
HEALTH
FOUNDATION
ANNUAL REPORT 2023



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 Commu-

nity 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



INVESTING IN THE SOCIAL DETERMINANTS OF HEALTH

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.



Systems change

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.



Addressing immediate needs

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.





Housing

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.



Homelessness

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.²

\$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.¹

\$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.¹

\$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.²
\$25,000

Community Foundation for MetroWest

To support emergency health
needs for new immigrants.
\$20,000

Community Foundation for MetroWest

To support the RAM Clinic.
\$5,000

Jewish Family Service of Metrowest

To add a caseworker to the
Framingham Public Schools
Welcome Center.¹
\$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.²
\$4,750

Natick Service Council, Inc.

To support staffing in the
food pantry.²
\$15,000.

Natick Service Council, Inc.

To support the food pantry.²
\$25,000

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.²
\$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

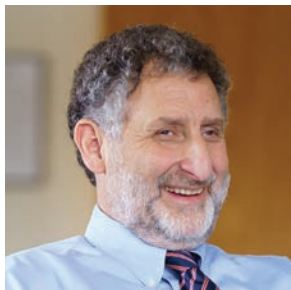
² From the Leonard Morse Grants Panel



With gratitude...

**At the end of 2023, the foundation said
goodbye to two of its founding staff
members—Martin Cohen and Cathy Glover.**





For the last 24 years, Marty Cohen has led the MetroWest Health Foundation in providing close to \$80 million in support of health and human service programs in the region. As

the foundation's founding President & CEO, Marty was given the task of turning the proceeds from the 1996 sale of MetroWest Medical Center into a charitable foundation that would, as its mission states, "improve the health status of the community, its individuals and families through informed and innovative leadership." Through Marty's leadership the foundation's work was more than just providing funding. Rather, he saw the foundation as a catalyst for change, bringing government, nonprofit organizations, and individuals together to bring innovative ideas and solutions to those in need.



Cathy Glover's work with the foundation began long before there was a foundation. As an employee of MetroWest Health inc.—the nonprofit parent

of MetroWest Medical Center, she was instrumental in organizing the Steering Committee that helped define the purpose of the foundation. As the only other foundation employee for its first four years, Cathy worked on every aspect of the foundation's mission. She implemented and managed the foundation's grant management database and has processed every grant request and payment. She also managed the scholarship program, which has awarded over \$2.5 million to enable area students to pursue careers in medicine, nursing, and the allied health professions.

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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Rebecca Gallo, *Senior Program Officer*
Cathy Glover, *Grants Management Director*

As of 9/30/23

Financials

STATEMENT OF FINANCIAL POSITION SEPTEMBER 30, 2023

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

ASSETS	2023	2022
Cash and cash equivalents	\$1,543,550	\$2,490,256
Investments	\$98,862,588	\$90,449,507
Beneficial interests in perpetual trusts	\$7,104,287	\$6,732,924
Right-of-Use Asset – Operating, net	\$504,523	—
Other assets	\$104,302	\$99,540
Total assets	\$108,119,250	\$99,772,227
LIABILITIES & NET ASSETS	2023	2022
Liabilities		
Accrued expenses and other	\$1,554,905	\$1,868,556
Grants payable	\$1,657,574	\$2,848,435
Operating Lease Liability	\$522,052	—
Deferred excise taxes	\$420,949	\$281,619
Total liabilities	\$4,155,480	\$4,998,610
Net Assets		
Without donor restrictions:		
• General purpose funds	\$58,055,237	\$51,489,680
• Grants Panels	\$27,362,168	\$26,124,321
Total without donor restrictions	\$85,417,405	\$77,614,001
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)

REVENUES	2023	2022
Income from outside trusts and other	\$420,660	\$363,718
Net assets released from purpose restrictions	—	—
Net gains (losses) on beneficial interests in perpetual trusts	\$371,363	(\$1,672,269)
Investment return, net	\$12,125,117	(\$14,998,796)
Total revenues	(\$12,917,140)	(\$16,307,347)
OPERATING EXPENSES	2023	2022
Program services		
• Community Education and Advocacy	\$479,620	\$456,711
• Grant and related	\$2,651,225	\$5,369,945
Total program services	\$3,130,845	\$5,826,656
Management and general	\$596,142	\$206,776
Total operating expenses	\$3,726,987	\$6,033,432
Changes in net assets	\$9,190,153	(\$22,340,779)
NET ASSETS	2023	2022
Beginning of year	\$94,773,617	\$117,114,396
End of year	\$103,963,770	\$94,773,617

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.



METROWEST
HEALTH
FOUNDATION



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