

Return of Private Foundation

Department of the Treasury
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation

2016

Do not enter social security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2016 or tax year beginning **OCT 1, 2016**, and ending **SEP 30, 2017**

Name of foundation METROWEST HEALTH FOUNDATION, INC.		A Employer identification number 04-2121342
Number and street (or P.O. box number if mail is not delivered to street address) 161 WORCESTER ROAD, SUITE 202	Room/suite	B Telephone number (508) 879-7625
City or town, state or province, country, and ZIP or foreign postal code FRAMINGHAM, MA 01701		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 105,574,677.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	339,783.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,936,726.	1,936,726.		STATEMENT 4
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,818,498.			
	b Gross sales price for all assets on line 6a 12,908,010.				
	7 Capital gain net income (from Part IV, line 2)		2,818,498.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	5,095,007.	4,755,224.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	255,756.	30,178.	0.	225,578.
	14 Other employee salaries and wages	257,219.	0.	0.	257,219.
	15 Pension plans, employee benefits	158,252.	9,351.	0.	148,901.
	16a Legal fees STMT 5	519.	0.	0.	519.
	b Accounting fees STMT 6	35,273.	0.	0.	35,273.
	c Other professional fees STMT 7	132,711.	76,545.	0.	56,166.
	17 Interest				
	18 Taxes STMT 8	177,202.	0.	0.	0.
	19 Depreciation and depletion	6,641.	0.	0.	
	20 Occupancy	104,990.	5,917.	0.	99,073.
	21 Travel, conferences, and meetings	53,255.	1,746.	0.	51,509.
	22 Printing and publications	18,683.	0.	0.	18,683.
	23 Other expenses STMT 9	614,499.	515,858.	0.	98,641.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,815,000.	639,595.	0.	991,562.
	25 Contributions, gifts, grants paid	3,680,468.			3,389,554.
26 Total expenses and disbursements. Add lines 24 and 25	5,495,468.	639,595.	0.	4,381,116.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<400,461.>				
b Net investment income (if negative, enter -0-)		4,115,629.			
c Adjusted net income (if negative, enter -0-)			0.		

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only.		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	118,778.	143,058.	143,058.
	2 Savings and temporary cash investments	684,110.	1,095,365.	1,095,365.
	3 Accounts receivable ▶ 30,856.			
	Less: allowance for doubtful accounts ▶		30,856.	30,856.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	75,996.	170,014.	170,014.
	10a Investments - U.S. and state government obligations STMT 11	3,185,034.	2,367,748.	2,367,748.
	b Investments - corporate stock STMT 12	46,946,276.	49,600,232.	49,600,232.
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 13	40,151,034.	44,843,180.	44,843,180.	
14 Land, buildings, and equipment: basis ▶ 123,700.				
Less: accumulated depreciation STMT 14 ▶ 113,671.	13,755.	10,029.	10,029.	
15 Other assets (describe ▶ STATEMENT 15)	7,033,821.	7,314,195.	7,314,195.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	98,208,804.	105,574,677.	105,574,677.	
Liabilities	17 Accounts payable and accrued expenses	476,801.	781,415.	
	18 Grants payable	1,546,809.	1,837,723.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 16)	421,800.	555,436.	
23 Total liabilities (add lines 17 through 22)	2,445,410.	3,174,574.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	79,785,668.	85,263,923.	
	25 Temporarily restricted	6,749,948.	7,628,028.	
	26 Permanently restricted	9,227,778.	9,508,152.	
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances	95,763,394.	102,400,103.		
31 Total liabilities and net assets/fund balances	98,208,804.	105,574,677.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	95,763,394.
2 Enter amount from Part I, line 27a	2	<400,461.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 10	3	7,037,170.
4 Add lines 1, 2, and 3	4	102,400,103.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	102,400,103.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	MUTUAL FUNDS	P	VARIOUS	VARIOUS
b	EQUITY HEDGE FUND OF FUNDS	P	VARIOUS	VARIOUS
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	9,170,642.		7,999,359.	1,171,283.
b	3,737,368.		2,090,153.	1,647,215.
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,171,283.
b			1,647,215.
c			
d			
e			

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	2,818,498.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	4,945,243.	88,968,114.	.055584
2014	3,374,870.	94,080,684.	.035872
2013	4,282,891.	95,817,606.	.044698
2012	3,725,222.	88,017,652.	.042324
2011	3,182,574.	83,021,127.	.038335

2	Total of line 1, column (d)	2	.216813
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.043363
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	92,192,608.
5	Multiply line 4 by line 3	5	3,997,748.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	41,156.
7	Add lines 5 and 6	7	4,038,904.
8	Enter qualifying distributions from Part XII, line 4	8	4,384,031.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	41,156.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	41,156.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	41,156.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	82,138.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	82,138.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	40,982.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 40,982. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?
Website address WWW.MWHEALTH.ORG
14 The books are in care of MARTIN COHEN, PRESIDENT & CEO Telephone no. (508) 879-7625
Located at 161 WORCESTER ROAD, FRAMINGHAM, MA ZIP+4 01701
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here
and enter the amount of tax-exempt interest received or accrued during the year 15 N/A
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a During the year did the foundation (either directly or indirectly):
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) Yes No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Yes No

5b Yes No

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No

N/A

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

6b Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

N/A

7b Yes No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 17		255,756.	55,857.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
REBECCA DONHAM - 161 WORCESTER RD, FRAMINGHAM, MA 01701	SR. PRGM OFFICER. 36.00	101,850.	36,379.	0.
CATHY GLOVER - 161 WORCESTER RD, FRAMINGHAM, MA 01701	GRANT MGMT DIR. 40.00	99,267.	31,425.	0.
REBECCA GALLO - 161 WORCESTER RD, FRAMINGHAM, MA 01701	PROGRAM OFFICER 24.00	47,000.	4,700.	0.

Total number of other employees paid over \$50,000 Yes No 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

Table with 3 columns: (a) Name and address of each person paid more than \$50,000, (b) Type of service, (c) Compensation. Rows include FSG, PRIME BUCHHOLZ & ASSOCIATES, and STATE STREET CORPORATION.

Total number of others receiving over \$50,000 for professional services 0

Part IX-A Summary of Direct Charitable Activities

Table with 2 columns: Description of activity, Expenses. Row 1: SEE STATEMENT 18, 133,846.

Part IX-B Summary of Program-Related Investments

Table with 2 columns: Description of investment, Amount. Row 1: N/A.

Total. Add lines 1 through 3 0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	48,483,579.
b	Average of monthly cash balances	1b	698,770.
c	Fair market value of all other assets	1c	44,414,207.
d	Total (add lines 1a, b, and c)	1d	93,596,556.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) SEE STATEMENT 19 1e 7,314,195.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	93,596,556.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,403,948.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	92,192,608.
6	Minimum investment return. Enter 5% of line 5	6	4,609,630.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	4,609,630.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	41,156.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	41,156.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,568,474.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,568,474.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	4,568,474.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	4,381,116.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	2,915.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,384,031.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	41,156.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,342,875.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				4,568,474.
2 Undistributed income, if any, as of the end of 2016:				
a Enter amount for 2015 only			1,400,904.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 4,384,031.				
a Applied to 2015, but not more than line 2a			1,400,904.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions) **	302,814.			
d Applied to 2016 distributable amount				2,680,313.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	302,814.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				1,888,161.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	302,814.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

** SEE STATEMENT 20

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

Table with 5 columns: (a) 2016, (b) 2015, (c) 2014, (d) 2013, (e) Total. Rows include 2a-e (Qualifying distributions) and 3a-d (Alternative tests).

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

SEE STATEMENT 21

b The form in which applications should be submitted and information and materials they should include:

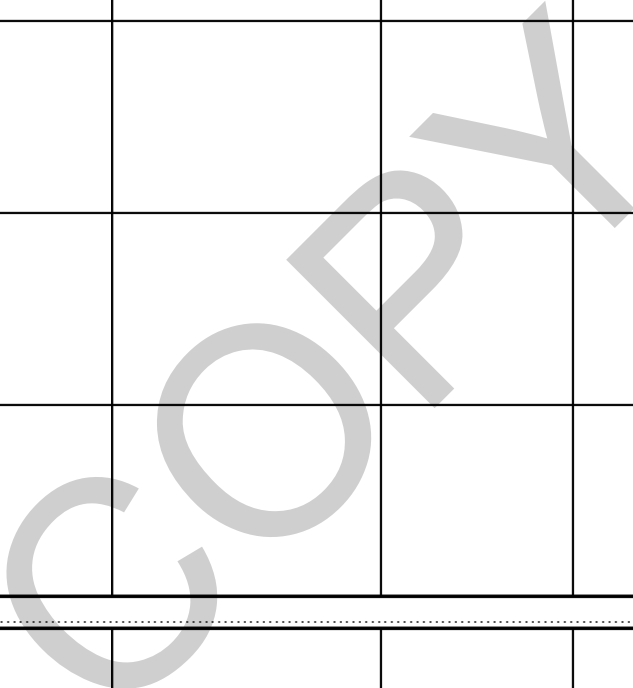
c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED				3,389,554.
Total			▶ 3a	3,389,554.
b Approved for future payment SEE ATTACHED				1,837,723.
Total			▶ 3b	1,837,723.



Part XVI-A Analysis of Income-Producing Activities

Table with columns: Unrelated business income (a, b), Excluded by section 512, 513, or 514 (c, d), and (e) Related or exempt function income. Rows include: 1 Program service revenue, 2 Membership dues and assessments, 3 Interest on savings and temporary cash investments, 4 Dividends and interest from securities, 5 Net rental income or (loss) from real estate, 6 Net rental income or (loss) from personal property, 7 Other investment income, 8 Gain or (loss) from sales of assets other than inventory, 9 Net income or (loss) from special events, 10 Gross profit or (loss) from sales of inventory, 11 Other revenue, 12 Subtotal, 13 Total.

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No. and Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash			X
(2) Other assets			X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization			X
(2) Purchases of assets from a noncharitable exempt organization			X
(3) Rental of facilities, equipment, or other assets			X
(4) Reimbursement arrangements			X
(5) Loans or loan guarantees			X
(6) Performance of services or membership or fundraising solicitations			X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees			X
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee: **THOMAS WASHBURN, CPA** Date: **01/05/18** Title: **PRESIDENT, CEO**

May the IRS discuss this return with the preparer shown below (see instr.)? Yes No

Paid Preparer Use Only	Print/Type preparer's name THOMAS WASHBURN, CPA	Preparer's signature THOMAS WASHBURN,	Date 01/05/18	Check <input type="checkbox"/> if self-employed	PTIN P01375551
	Firm's name ALEXANDER, ARONSON, FINNING & CO., P.C.			Firm's EIN 04-2571780	
	Firm's address 50 WASHINGTON STREET WESTBORO, MA 01581			Phone no. (508) 366-9100	

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No.	Description	Date Acquired	Method	Life	Conv	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	FIXED ASSETS	VARIOUS	SL	.000		16	123,700.				123,700.	107,030.		6,641.	113,671.
	* TOTAL 990-PF PG 1 DEPR						123,700.				123,700.	107,030.		6,641.	113,671.

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	4
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	
SECURITIES	1,936,726.	0.	1,936,726.	1,936,726.	1,936,726.	
TO PART I, LINE 4	1,936,726.	0.	1,936,726.	1,936,726.	1,936,726.	

FORM 990-PF	LEGAL FEES				STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
LEGAL	519.	0.	0.	519.		
TO FM 990-PF, PG 1, LN 16A	519.	0.	0.	519.		

FORM 990-PF	ACCOUNTING FEES				STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
ACCOUNTING	35,273.	0.	0.	35,273.		
TO FORM 990-PF, PG 1, LN 16B	35,273.	0.	0.	35,273.		

FORM 990-PF	OTHER PROFESSIONAL FEES				STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
PROFESSIONAL FEES	132,711.	76,545.	0.	56,166.		
TO FORM 990-PF, PG 1, LN 16C	132,711.	76,545.	0.	56,166.		

FORM 990-PF	TAXES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EXCISE TAX EXPENSE	177,202.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	177,202.	0.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	9
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
WEB & COMPUTER SUPPORT INSURANCE	50,267.	0.	0.	50,267.	
EQUIPMENT RENTAL	7,111.	0.	0.	7,111.	
OFFICE SUPPLIES AND SUPPORT INVESTMENT FEES	8,083.	0.	0.	8,083.	
	33,180.	0.	0.	33,180.	
	515,858.	515,858.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	614,499.	515,858.	0.	98,641.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	10
DESCRIPTION		AMOUNT	
UNREALIZED GAIN ON INVESTMENTS		6,756,796.	
GAIN ON BENEFICIAL INTERESTS IN PERPETUAL TRUSTS		280,374.	
TOTAL TO FORM 990-PF, PART III, LINE 3		7,037,170.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS		STATEMENT	11
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT OBLIGATIONS -FIXED INCOME	X		2,367,748.	2,367,748.
TOTAL U.S. GOVERNMENT OBLIGATIONS			2,367,748.	2,367,748.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			2,367,748.	2,367,748.

FORM 990-PF	CORPORATE STOCK		STATEMENT	12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS-FIXED INCOME	14,541,070.	14,541,070.
MUTUAL FUNDS-EQUITIES	35,059,162.	35,059,162.
TOTAL TO FORM 990-PF, PART II, LINE 10B	49,600,232.	49,600,232.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	13
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
EQUITY HEDGE FUNDS OF FUNDS	FMV	38,547,193.	38,547,193.
COMMODITIES FUND	FMV	3,645,167.	3,645,167.
PUBLIC/PRIVATE REAL ESTATE FUND	FMV	2,650,820.	2,650,820.
TOTAL TO FORM 990-PF, PART II, LINE 13		44,843,180.	44,843,180.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 14

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FIXED ASSETS	123,700.	113,671.	10,029.
TOTAL TO FM 990-PF, PART II, LN 14	123,700.	113,671.	10,029.

FORM 990-PF OTHER ASSETS STATEMENT 15

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
BENEFICIAL INTERESTS IN PERPETUAL TRUSTS	7,033,821.	7,314,195.	7,314,195.
TO FORM 990-PF, PART II, LINE 15	7,033,821.	7,314,195.	7,314,195.

FORM 990-PF OTHER LIABILITIES STATEMENT 16

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED EXCISE TAXES	324,751.	460,798.
FUNDS HELD FOR OTHERS	97,049.	94,638.
TOTAL TO FORM 990-PF, PART II, LINE 22	421,800.	555,436.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 17
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MARTIN COHEN 161 WORCESTER RD. FRAMINGHAM, MA 01701	PRESIDENT/CEO 40.00	255,756.	55,857.	0.
ADAM ROGERS 161 WORCESTER RD. FRAMINGHAM, MA 01701	TREASURER 5.00	0.	0.	0.
JOHN CORRON 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 5.00	0.	0.	0.
CAROL GLOFF 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 5.00	0.	0.	0.
ALAN GELLER 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
ANNE MARIE BOURSIQUOT KING 161 WORCESTER RD. FRAMINGHAM, MA 01701	VICE CHAIR 1.00	0.	0.	0.
KATHLEEN HERRMAN 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
COLEEN TORONTO 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
JOHN KRIKORIAN 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
REGINA MARSHALL 161 WORCESTER RD. FRAMINGHAM, MA 01701	CLERK 1.00	0.	0.	0.
MEYER LEVY 161 WORCESTER RD. FRAMINGHAM, MA 01701	CHAIR 1.00	0.	0.	0.

WILLIAM GRAHAM	TRUSTEE			
161 WORCESTER RD.	1.00	0.	0.	0.
FRAMINGHAM, MA 01701				
ANNA CROSS	TRUSTEE			
161 WORCESTER RD.	1.00	0.	0.	0.
FRAMINGHAM, MA 01701				
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		255,756.	55,857.	0.

FORM 990-PF SUMMARY OF DIRECT CHARITABLE ACTIVITIES STATEMENT 18

ACTIVITY ONE

- 1.THE FOUNDATION PROVIDED EXTENSIVE LEADERSHIP, RESEARCH, DATA COLLECTION AND PROGRAM SUPPORT TO IMPROVE HEALTH AND HEALTH CARE SERVICES TO THE TWENTY-FIVE COMMUNITIES IN THE METROWEST AREA OF MASSACHUSETTS.
- 2.THE FOUNDATION PROVIDED \$3.3 MILLION IN GRANT FUNDING TO IMPROVE THE HEALTH OF THE METROWEST RESIDENTS. THE FOUNDATION AWARDED 66 NEW GRANTS IN FY 2017 PROVIDING OVER \$2.4 MILLION IN NEW FUNDING TO NONPROFIT COMMUNITY ORGANIZATIONS AND MUNICIPAL GOVERNMENTS FOR A VARIETY OF PROGRAMS THAT SERVE ELDERS, YOUTH AND SPECIAL POPULATIONS SUCH AS THE HOMELESS AND INDIGENT,
- 3.THE FOUNDATION PROVIDED \$86,000 IN SCHOLARSHIPS ENABLING 50 RESIDENTS TO PURSUE DEGREE PROGRAMS IN NURSING, MEDICINE AND ALLIED HEALTH PROFESSIONS.
- 4.THE FOUNDATION SPONSORED THE METROWEST HEALTH LEADERSHIP PROGRAM, OFFERING LEADERSHIP TRAINING TO 10 INDIVIDUALS FROM HEALTH AND HUMAN SERVICES AGENCIES WITHIN OUR SERVICE AREA.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

133,846.

FORM 990-PF

REDUCTION EXPLANATION
PART X, LINE 1E

STATEMENT 19

EXPLANATION FOR REDUCTION CLAIMED FOR BLOCKAGE OR OTHER FACTORS

THE VALUE OF THE ASSET BEFORE THE REDUCTION CLAIMED ABOVE AS OF SEPTEMBER 30, 2017 WAS \$7,314,195. THE DISCOUNT CLAIMED IS 100% OF THE ASSET VALUE DUE TO CERTAIN RESTRICTIONS ON THE ASSET AS NOTED. THE FOUNDATION RECORDS ITS DESIGNATED INTEREST IN OUTSIDE PERPETUAL TRUSTS WHERE THE TRUSTEES DO NOT HAVE VARIANCE POWER. THE FOUNDATION COMPUTES ITS INTEREST BY MULTIPLYING THE ITS DESIGNATED INTEREST PERCENTAGE BY THE VALUE OF THE INVESTMENTS OF THE TRUST. THE TRUSTEES OF THE VARIOUS PERPETUAL TRUSTS RETAIN ALL DISCRETION OVER THE INVESTMENT AND DISTRIBUTION OF TRUST ASSETS. THE FOUNDATION CLAIMS A BLOCKAGE ASSOCIATED WITH WITH THE FULL VALUE OF ITS INVESTMENT IN PERPETUAL TRUSTS. ASSETS DISTRIBUTED FROM THE TRUSTS ARE USED TO SATISFY PRIVATE FOUNDATION DISTRIBUTION REQUIREMENTS FOR EACH TRUST. AS SUCH, THE DISTRIBUTIONS MADE BY THE FOUNDATION FROM TRUST INCOME ARE ADJUSTED FROM THE FOUNDATION'S QUALIFYING DISTRIBUTIONS AS A DISTRIBUTION FROM CORPUS PURSUANT TO 53.4942(A)-3(D)(2).

COPY

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO TREAT
EXCESS QUALIFYING DISTRIBUTIONS
AS DISTRIBUTIONS OUT OF CORPUS

STATEMENT 20

METROWEST RECEIVED CONTRIBUTIONS FROM OTHER PRIVATE FOUNDATIONS AND DISTRIBUTED AN AMOUNT EQUAL IN VALUE TO THE CONTRIBUTIONS RECEIVED. AS SUCH METROWEST IS ELECTING TO DISTRIBUTE THE QUALIFYING DISTRIBUTIONS OUT OF CORPUS PURSUANT TO REGULATION 53.4942(A)-3(D)(2).

THE TRUST DISTRIBUTIONS INCLUDE THE FOLLOWING:

1. CHICKERING TRUST C/O MELLON BANK- \$279,321
2. CLARK TRUST C/O BANK OF AMERICA- \$12,348
3. SARAH WHITE TRUST C/O BANK OF AMERICA- \$11,145

COPY

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 21

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARTIN COHEN, PRESIDENT, METROWEST HEALTH FOUNDATION
161 WORCESTER ROAD, SUITE 202
FRAMINGHAM, MA 01701

TELEPHONE NUMBER

508-879-7625

FORM AND CONTENT OF APPLICATIONS

APPLICATIONS MUST FOLLOW A STANDARD REQUEST FOR PROPOSALS THAT INCLUDES A DESCRIPTION OF THE UNMET HEALTH NEED TO BE ADDRESSED, PROGRAM GOALS AND OBJECTIVES, BUDGET, AND BUDGET NARRATIVE.

ANY SUBMISSION DEADLINES

THE FOUNDATION HAS TWO SUBMISSION DEADLINES PER YEAR (SPRING/FALL).

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS ARE LIMITED TO PROPOSALS THAT ADDRESS AN UNMET HEALTH NEED IN THE 25-TOWN AREA SERVED BY THE FOUNDATION. ELIGIBLE APPLICANTS ARE EITHER TAX-EXEMPT ORGANIZATIONS 501(C)(3) OR GOVERNMENTAL ENTITIES.

SEE THE FOUNDATION'S WEB SITE AT WWW.MWHEALTH.ORG FOR FURTHER INFORMATION.

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARTIN COHEN, PRESIDENT, METROWEST HEALTH FOUNDATION
161 WORCESTER ROAD, SUITE 202
FRAMINGHAM, MA 01701

TELEPHONE NUMBER NAME OF GRANT PROGRAM

508-879-7625 SCHOLARSHIPS

FORM AND CONTENT OF APPLICATIONS

COMPLETED CONFIDENTIAL SCHOLARSHIP APPLICATION FORM AND FEDERAL FINANCIAL AID FORM.

ANY SUBMISSION DEADLINES

APPLICATIONS SHOULD BE SUBMITTED TO THE FOUNDATION OFFICE.

RESTRICTIONS AND LIMITATIONS ON AWARDS

SCHOLARSHIPS ARE AVAILABLE FOR CERTAIN NURSING, MEDICAL AND CLINICAL PROGRAMS, AND ARE BASED ON FINANCIAL NEED, ACADEMIC PERFORMANCE, AND DEMONSTRATED MOTIVATION AND CHARACTER TO OBTAIN A FORMAL EDUCATION IN A NURSING, MEDICAL OR CLINICAL PROFESSION. SCHOLARSHIPS ARE LIMITED TO RESIDENTS OR EMPLOYEES OF TOWNS IN THE FOUNDATION'S SERVICE AREA. APPLICANTS MUST COMPLETE A CONFIDENTIAL SCHOLARSHIP APPLICATION FORM AND SUBMIT ALL REQUIRED ATTACHMENTS TO THE FOUNDATION OFFICE. STUDENTS MUST ALSO COMPLETE A FEDERAL FINANCIAL AID FORM. APPLICATIONS ARE REVIEWED BY THE FOUNDATION'S SCHOLARSHIP COMMITTEE AS THEY ARE RECEIVED AND MAY BE SUBMITTED BETWEEN APRIL 15TH AND MAY 31ST AND OCTOBER 15TH AND NOVEMBER 30TH. SCHOLARSHIPS ARE AWARDED FOR TUITION FEES ONLY UP TO A MAXIMUM OF \$2,000.

Schedule of Appropriations and Payments Showing Population Served

10/11/2017

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Advocates, Inc. 1881 Worcester Road Framingham, MA 01701 <i>Psychiatry Access Project</i> \$74,268.32 2017	PC Public Charity	\$0.00	\$74,268.32	\$0.00	\$74,268.32	\$0.00
Advocates, Inc. 1881 Worcester Road Framingham, MA 01701 <i>Behavioral Health Partners of MetroWest: Implementation Request</i> \$74,952.79 2017	PC Public Charity	\$0.00	\$74,952.79	\$0.00	\$74,952.79	\$0.00
Appalachian Mountain Club 5 Joy Street Boston, MA 02108 <i>Outdoors Rx: Getting Youth & Families Outside and Active in Framingham</i> \$10,000.00 2017	PC Public Charity	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$0.00
Assabet Valley Regional Technical School 215 Fitchburg Street Marlboro, MA 01752 <i>Assabet Valley CARES</i> \$210,000.00 2014	PC Public Charity	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
BayPath Elder Services, Inc. 33 Boston Post Road West, Ste. 510 Marlborough, MA 01752-1853 <i>Creating Dementia Friendly Communities, Phase Two</i> \$18,720.00 2016	PC Public Charity	\$9,360.00	\$0.00	\$0.00	\$9,360.00	\$0.00
BayPath Elder Services, Inc. 33 Boston Post Road West, Ste. 510 Marlborough, MA 01752-1853 <i>Healthy Living; Empowering Older Adults with Chronic Diseases</i> \$19,875.00 2017	PC Public Charity	\$0.00	\$19,875.00	\$0.00	\$19,875.00	\$0.00
BayPath Elder Services, Inc. 33 Boston Post Road West, Ste. 510 Marlborough, MA 01752-1853 <i>LGBT Elder Initiative</i> \$36,501.00 2017	PC Public Charity	\$0.00	\$36,501.00	\$0.00	\$36,501.00	\$0.00
Bellingham Public Schools 4 Mechanic Street Bellingham, MA 02019 <i>BHS BRIDGES Transition Program</i> \$209,942.51 2015	PC Public Charity	\$103,471.25	\$0.00	\$0.00	\$69,064.17	\$34,407.08
Bellingham Public Schools 4 Mechanic Street Bellingham, MA 02019 <i>Early Childhood Social-Emotional Learning Initiative</i> \$25,000.00 2016	PC Public Charity	\$12,500.00	\$0.00	\$0.00	\$12,500.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Bellingham Public Schools 4 Mechanic Street Bellingham, MA 02019 <i>SEL: Enhancing Students' Capacity for Successful Engagement</i> \$105,000.00 2017	PC Public Charity	\$0.00	\$105,000.00	\$0.00	\$20,000.00	\$85,000.00
Bethany Hill Place 89 Bethany Road Framingham, MA 01702 <i>Capacity building - safety and hygiene improvements.</i> \$12,460.00 2017	PC Public Charity	\$0.00	\$12,460.00	\$0.00	\$12,460.00	\$0.00
Valley Tech Educational Foundation 65 Pleasant Street Upton, MA 01568-1499 <i>The BVT Bridge Program</i> \$180,000.00 2014	PC Public Charity	\$30,000.00	\$0.00	\$0.00	\$30,000.00	\$0.00
Valley Tech Educational Foundation 65 Pleasant Street Upton, MA 01568-1499 <i>H.E.A.R.T. (Healthy Environment for At-Risk Teens)</i> \$5,776.00 2017	PC Public Charity	\$0.00	\$5,776.00	\$0.00	\$5,776.00	\$0.00

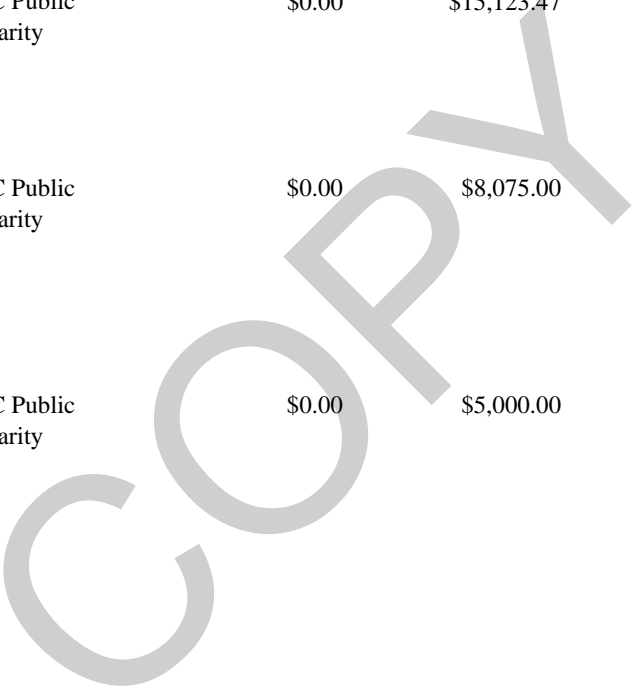
Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
The Bridge of Central Massachusetts, Inc. 4 Mann Street Worcester, MA 01602 <i>Comprehensive DBT, Self-Injury, & Suicide Prevention Training & Consultation</i> \$55,611.86 2016	PC Public Charity	\$27,805.93	\$0.00	\$0.00	\$27,805.93	\$0.00
The Bridge of Central Massachusetts, Inc. 4 Mann Street Worcester, MA 01602 <i>EHR Implementation</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
The Bridge of Central Massachusetts, Inc. 4 Mann Street Worcester, MA 01602 <i>DBT, Self-Injury and Suicide Prevention Training and Consultation</i> \$31,000.00 2017	PC Public Charity	\$0.00	\$31,000.00	\$0.00	\$31,000.00	\$0.00
Brookline Community Mental Health Center 41 Garrison Road Brookline, MA 02445 <i>Continuous Improvement and Sustainability among School-Based Transition Programs in the MetroWest Region.</i> \$30,000.00 2017	PC Public Charity	\$0.00	\$30,000.00	\$0.00	\$7,500.00	\$22,500.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Common Street Spiritual Center 13 Common Street Natick, MA 01760 <i>Gun Buy-back Program</i> \$10,000.00 2017	PC Public Charity	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$0.00
Commonwealth of Massachusetts Department of Public Health 250 Washington Street, 4th Floor Boston, MA 02108 <i>Mass in Motion MetroWest Moves</i> \$60,000.00 2017	PC Public Charity	\$0.00	\$60,000.00	\$0.00	\$60,000.00	\$0.00
Council on Foundations 2121 Crystal Drive, Suite 700 Arlington, VA 22202 <i>Membership Dues 2017</i> \$13,100.00 2017	PC Public Charity	\$0.00	\$13,100.00	\$0.00	\$13,100.00	\$0.00
Daniel's Table 102 Fountain Street Framingham, MA 01702 <i>The Path to Nutritional Equality</i> \$157,062.00 2017	PC Public Charity	\$0.00	\$157,062.00	\$0.00	\$72,402.00	\$84,660.00
Dover-Sherborn Regional Schools 157 Farm Street Dover, MA 02030 <i>Dover-Sherborn High School Transition Program</i> \$158,040.00 2017	PC Public Charity	\$0.00	\$158,040.00	\$0.00	\$75,040.00	\$83,000.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Education Development Center, Inc. 43 Foundry Avenue Waltham, MA 02453-8313 <i>2018 MetroWest Adolescent Health Survey</i> \$633,034.00 2017	PC Public Charity	\$0.00	\$633,034.00	\$0.00	\$236,862.00	\$396,172.00
Edward M. Kennedy Community Health Center 650 Lincoln Street Worcester, MA 01605 <i>Extending Behavioral Health Integration to Kennedy CHC-Milford</i> \$184,323.80 2016	PC Public Charity	\$89,188.35	\$0.00	\$0.00	\$0.00	\$89,188.35
Edward M. Kennedy Community Health Center 650 Lincoln Street Worcester, MA 01605 <i>Provider Education and Policy Change in Opioid Prescription</i> \$7,017.00 2017	PC Public Charity	\$0.00	\$7,017.00	\$0.00	\$7,017.00	\$0.00
Edward M. Kennedy Community Health Center 650 Lincoln Street Worcester, MA 01605 <i>Clinical Care Management in High Risk Patients</i> \$135,000.00 2017	PC Public Charity	\$0.00	\$135,000.00	\$0.00	\$50,000.00	\$85,000.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Family Continuity (FCP Inc.) 9 Centennial Drive, Suite 202 Peabody, MA 01960 <i>School Based Behavioral Health Services</i> \$65,040.07 2017	PC Public Charity	\$0.00	\$65,040.07	\$0.00	\$54,731.65	\$10,308.42
Metrowest Interfaith Hospitalitynetwork Inc P.O. Box 847 Natick, MA 01760 <i>Family Health Initiative</i> \$19,965.00 2017	PC Public Charity	\$0.00	\$19,965.00	\$0.00	\$19,965.00	\$0.00
Framingham Police Department 1 William Welch Way Framingham, MA 01702 <i>Gun Buyback Program</i> \$5,000.00 2017	Municipality of Government	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$0.00
Framingham Public Schools 73 Mt. Wayte Ave., Suite #5 Framingham, MA 01702 <i>Social Emotional Learning Assessment Project</i> \$25,000.00 2016	PC Public Charity	\$12,500.00	\$0.00	\$0.00	\$12,500.00	\$0.00
Framingham Public Schools 73 Mt. Wayte Ave., Suite #5 Framingham, MA 01702 <i>Early Childhood Social-Emotional Learning Implementation Grant</i> \$105,000.00 2017	PC Public Charity	\$0.00	\$105,000.00	\$0.00	\$40,000.00	\$65,000.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Framingham State University 100 State Street Dwight Hall Framingham, MA 01701 <i>Framingham State University Suicide Prevention Task Force Dialectical Behavioral Therapy Skills Group</i> \$9,100.00 2017	PC Public Charity	\$0.00	\$9,100.00	\$0.00	\$9,100.00	\$0.00
Framingham State University 100 State Street Dwight Hall Framingham, MA 01701 <i>Funding for Mental Health Kiosk</i> \$15,123.47 2017	PC Public Charity	\$0.00	\$15,123.47	\$0.00	\$15,123.47	\$0.00
Grant Makers in Health 1100 Connecticut Ave, NW Suite 1200 Washington, DC 20036 <i>Membership Dues</i> \$8,075.00 2017	PC Public Charity	\$0.00	\$8,075.00	\$0.00	\$8,075.00	\$0.00
Grant Makers in Health 1100 Connecticut Ave, NW Suite 1200 Washington, DC 20036 <i>Support of a Special Report on Health Conversion Foundations</i> \$5,000.00 2017	PC Public Charity	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$0.00



Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Grantmakers for Effective Organizations 1725 DeSales Street, NW Suite 404 Washington, DC 20036 <i>Membership Dues</i> \$1,920.00 2017	PC Public Charity	\$0.00	\$1,920.00	\$0.00	\$1,920.00	\$0.00
Health Care For All One Federal Street Boston, MA 02110 <i>Consumer Health Advocacy in Framingham, Natick, and Ashland</i> \$12,500.00 2017	PC Public Charity	\$0.00	\$12,500.00	\$0.00	\$12,500.00	\$0.00
Health Care For All One Federal Street Boston, MA 02110 <i>MassHealth ACO Consumer Action Project</i> \$50,000.00 2017	PC Public Charity	\$0.00	\$50,000.00	\$0.00	\$25,000.00	\$25,000.00
Health Care Without Walls, Inc. 148 Linden Street, Suite 208 Wellesley, MA 02482 <i>Family Shelter Care Program</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
Hockomock Area YMCA - Bernon Family Branch 45 Forge Hill Road Franklin, MA 02038 <i>YMCA's Diabetes Prevention Program</i> \$10,695.00 2017	PC Public Charity	\$0.00	\$10,695.00	\$0.00	\$10,695.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Hoops and Homework Inc. 56 Agnes Dr. Framingham, MA 01701 <i>Building Staff Capacity to Effectively Work with Children and Youth attending Hoops and Homework Program</i> \$10,000.00 2017	PC Public Charity	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$0.00
Hopkinton Public Schools 89 Hayden Rowe Street Hopkinton, MA 01748 <i>Hopkinton High School START (Student Therapeutic Academic Resource Team)</i> \$216,433.00 2015	PC Public Charity	\$69,595.30	\$0.00	\$0.00	\$69,595.30	\$0.00
Hopkinton Public Schools 89 Hayden Rowe Street Hopkinton, MA 01748 <i>Hopkinton Middle School START</i> \$220,328.00 2016	PC Public Charity	\$146,306.67	\$0.00	\$0.00	\$73,181.67	\$73,125.00
Hopkinton Youth & Family Services 18 Main Street Hopkinton, MA 01748 <i>MetroWest Youth Teaming Together (MYTT) Summit</i> \$12,247.50 2017	Municipality of Government	\$0.00	\$12,247.50	\$0.00	\$12,247.50	\$0.00
Hudson Board of Health 78 Main Street Hudson, MA 01749 <i>Hudson Adolescent Substance Use Intervention Initiative</i> \$181,586.00 2012	PC Public Charity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Hudson Public Schools 155 Apsley Street Hudson, MA 01749 <i>Pathways to Academic and Therapeutic Help (PATH)</i> \$217,067.00 2016	PC Public Charity	\$144,126.17	\$0.00	\$0.00	\$72,651.17	\$71,475.00
Jeff's Place Children's Bereavement Center, Inc. 34 Deloss Street, Second floor Framingham, MA 01702 <i>Staff Counselor</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$10,000.00	\$10,000.00
Jewish Family Service of Metrowest 475 Franklin Street, Suite 101 Framingham, MA 01702 <i>Immigrant & Refugee Psycho-education & Support Pilot Project</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
Kids Connect Inc. 43 Main Street Natick, MA 01760 <i>Stress Reduction thru Learning</i> \$10,000.00 2016	PC Public Charity	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00
King Philip Regional High School 201 Franklin Street Wrentham, MA 02093 <i>STEPS Program (continuation grant)</i> \$137,080.00 2016	PC Public Charity	\$34,040.00	\$0.00	\$0.00	\$0.00	\$34,040.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Lincoln Sudbury High School 390 Lincoln Road Sudbury, MA 01776 <i>Transition Program: Beacon</i> \$220,500.00 2014	PC Public Charity	\$36,750.00	\$0.00	\$0.00	\$36,750.00	\$0.00
Lovin' Spoonfuls 367 Western Ave Brighton, MA 02135-1005 <i>Lovin' Spoonfuls Food Rescue MetroWest Expansion</i> \$93,516.09 2016	PC Public Charity	\$63,384.59	\$0.00	\$0.00	\$36,926.93	\$26,457.66
Marlborough Public Schools District Education Center 17 Washington Street Marlborough, MA 01752-2225 <i>Whitcomb School Transition Program</i> \$108,100.00 2017	PC Public Charity	\$0.00	\$108,100.00	\$0.00	\$62,400.00	\$45,700.00
Massachusetts Medical Society and Alliance Charitable Foundation 860 Winter St Waltham, MA 02451 <i>Translation and Dissemination of Physician and Patient Fact Sheets - Opioids</i> \$10,000.00 2017	PC Public Charity	\$0.00	\$10,000.00	\$0.00	\$10,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Nihit Mehta</i> <i>47 Donna Lee Lane</i> <i>Ashland, MA 01721</i> \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Nelida Machicote</i> <i>711 Charlestown Meadows Drive</i> <i>Westborough, MA 01581</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Sidra Maqbool</i> <i>53 Auburn Street Extension Apt. # 3</i> <i>Framingham, MA 01701</i> \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Maria Luz Margulis</i> <i>6 Robert Road</i> <i>Framingham, MA 01702</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Amanda Kuczmiec</i> 63 Hadley Road Framingham, MA 01701 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jennifer Fishbein</i> 29 Saddle Ridge Sudbury, MA 01776 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Nolan Rothwell</i> 37 Birch Hill Road Ashland, MA 01721 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Alice Achieng,</i> 295 Turnpike Road, Apt. #22 Westborough, MA 01581 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Anne Marie Crowell</i> 14 Country Way Medfield, MA 02052 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Christina Matulis</i> 121 Arch Street Needham, MA 02492 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Theresa Rooney</i> 24 Bradford Street Needham, MA 02492 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Lucy Mull</i> 45 Dana Road Wellesley, MA 02482 02482 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Julia Masse</i> <i>10 Geneva Ave</i> <i>Norfolk, MA 02056</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Kristin L. Fonseca</i> <i>119 Hanlon Road</i> <i>Holliston, MA 01746</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Patrick Brooks</i> <i>134 Island Road</i> <i>Millis, MA 02054</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Danielle Cioffi</i> <i>221 Farm Street</i> <i>Millis, MA 02054</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Sakura Gandolfo</i> 28A Walnut Street Marlborough, MA 01752 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Marie Christine Hydro</i> 59 Priest Street Hudson, MA 01749 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jamie Horigan</i> 19 Curtis Road Hopkinton, MA 01748 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Danielle Kerrigan</i> 190 Prospect Street Holliston, MA 01746 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Medical/Clinical Scholarships 161 Worcester Road Framingham, MA 01701 <i>Lauren O'Brien</i> <i>30 Fatima Drive</i> <i>Ashland, MA 01721</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Medway Public Schools 45 Holliston Street Medway, MA 02053 <i>Replication of Bridge for Resilient Youth in Transition at Medway High School</i> \$188,045.85 2016	PC Public Charity	\$123,421.85	\$0.00	\$0.00	\$32,181.58	\$91,240.27
Metropolitan Area Planning Council 60 Temple Place Boston, MA 02111 <i>Reducing Older Adult Isolation Through Age Friendly Planning</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
MetroWest Free Medical Program c/o Congregation Beth El 105 Hudson Rd. Sudbury, MA 01776 <i>Responsive Grant: Healthy Food & Education to Improve Health</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
MetroWest Legal Services, Inc. 63 Fountain Street, Suite 304 Framingham, MA 01702 <i>Medical Legal Partnership</i> \$38,260.80 2017	PC Public Charity	\$0.00	\$38,260.80	\$0.00	\$38,260.80	\$0.00
MetroWest Legal Services, Inc. 63 Fountain Street, Suite 304 Framingham, MA 01702 <i>Juvenile Immigration Relief Project</i> \$70,770.20 2017	PC Public Charity	\$0.00	\$70,770.20	\$0.00	\$70,770.20	\$0.00
MetroWest Regional Transit Authority (MWRTA) 15 Blandin Avenue Framingham, MA 01702 <i>DDD (door-to-door defibrillation)</i> <i>Automated External Defibrillators (AEDs)</i> <i>on MWRTA's Paratransit Fleet</i> \$20,000.00 2017	Municipality of Government	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
Milford Council on Aging 60 North Bow Street Milford, MA 01757 <i>Wellness Program</i> \$16,000.00 2017	PC Public Charity	\$0.00	\$16,000.00	\$0.00	\$16,000.00	\$0.00
Milford Public Schools 31 W. Fountain Street Milford, MA 01757 <i>Early Childhood Social-Emotional Learning Initiative</i> \$25,000.00 2016	Municipality of Government	\$12,500.00	\$0.00	\$0.00	\$12,500.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Milford Public Schools 31 W. Fountain Street Milford, MA 01757 <i>Early Childhood Social-Emotional Learning Implementation Grant</i> \$105,000.00 2017	Municipality of Government	\$0.00	\$105,000.00	\$0.00	\$40,000.00	\$65,000.00
Milford Regional Healthcare Foundation 14 Prospect Street Milford, MA 01757 <i>Access to Care: Outreach in the Emergency Department</i> \$172,906.00 2015	PC Public Charity	\$23,194.50	\$0.00	\$0.00	\$23,194.50	\$0.00
Morse Institute in Natick 14 East Central Street Natick, MA 01760 <i>Health Documentary Series</i> \$11,000.00 2017	PC Public Charity	\$0.00	\$11,000.00	\$0.00	\$11,000.00	\$0.00
Natick Housing Authority 4 Cottage Street Natick, MA 01760 <i>NHA Resident Services Coordinator</i> \$133,970.00 2017	Municipality of Government	\$0.00	\$133,970.00	\$0.00	\$67,610.00	\$66,360.00
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Early Risers Skills for Success</i> \$135,250.00 2016	PC Public Charity	\$65,250.00	\$0.00	\$0.00	\$65,250.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Understanding Diversity and Supporting our LGBTQ (Lesbian, Gay, Bisexual, Transgender, Queer/Questioning) Youth</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$10,000.00	\$10,000.00
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>Substance Abuse Awareness Program (SAAP)</i> \$71,573.00 2015	PC Public Charity	\$11,905.75	\$0.00	\$0.00	\$11,905.75	\$0.00
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>Healthy Eating for Health Aging (HEHA)</i> \$81,414.00 2016	PC Public Charity	\$54,276.00	\$0.00	\$0.00	\$27,138.00	\$27,138.00
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>Smart Nutrition and Exercise for Kids (SNEK)</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$20,000.00	\$0.00
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>Natick Service Council Renovations</i> \$25,000.00 2017	PC Public Charity	\$0.00	\$25,000.00	\$0.00	\$25,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>Capacity Building - to purchase refrigeration equipment.</i> \$10,900.00 2017	PC Public Charity	\$0.00	\$10,900.00	\$0.00	\$10,900.00	\$0.00
Natick Visiting Nurse Association 209 W Central St, Suite 313 Natick, MA 01760 <i>MetroWest Meds</i> \$261,891.00 2017	PC Public Charity	\$0.00	\$261,891.00	\$0.00	\$261,891.00	\$0.00
Needham Council on Aging 83 Pickering Street Needham, MA 02492 <i>Expand Access to Behavioral Health Services for Seniors</i> \$80,000.00 2016	PC Public Charity	\$40,000.00	\$0.00	\$0.00	\$0.00	\$40,000.00
Needham Health Department 1471 Highland Avenue Needham, MA 02492 <i>Concussion Prevention, Education, and Training in Needham</i> \$20,000.00 2015	PC Public Charity	\$10,000.00	\$0.00	\$0.00	\$0.00	\$10,000.00
Needham Health Department 1471 Highland Avenue Needham, MA 02492 <i>Healthy Aging Needham</i> \$20,000.00 2017	PC Public Charity	\$0.00	\$20,000.00	\$0.00	\$10,000.00	\$10,000.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Needham Public Schools 1330 Highland Avenue Needham, MA 02492 <i>SBIRT for Needham Public School Students</i> <i>- Grade 7 to 12</i> \$7,400.00 2017	PC Public Charity	\$0.00	\$7,400.00	\$0.00	\$7,400.00	\$0.00
Northborough and Southborough Public Schools 53 Parkerville Road Southborough, MA 01772 <i>ACCESS</i> \$215,819.95 2016	PC Public Charity	\$107,182.30	\$0.00	\$0.00	\$70,817.57	\$36,364.73
Northborough and Southborough Public Schools 53 Parkerville Road Southborough, MA 01772 <i>Student Tiered Educational Program for Success STEPS program</i> \$218,020.15 2017	PC Public Charity	\$0.00	\$218,020.15	\$0.00	\$107,587.85	\$110,432.30
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Denise Sylvestre</i> <i>35 Briarwood Lane Apt 1</i> <i>Marlborough, MA 01752</i> \$2,000.00 2017	NC Non- Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Tammi Cabana</i> <i>11 Walnut Ave</i> <i>Franklin, MA 02038</i> \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Lionel Richie Agyemang</i> <i>14 Greenview Street, Apt. 207</i> <i>Framingham, MA 01701</i> \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jemima Boating</i> <i>152 East Main Street</i> <i>Northborough ,MA 01532</i> \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Leticia Veliz</i> <i>27 Hosmer Street, Apt. 6</i> <i>Marlborough, MA 01752</i> \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jhoalda Mendez</i> 21 Park Street Apt. 2 Hudson, MA 01749 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Renee Garceau</i> 9 Hanna Road Framingham, MA 01701 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Margaret June Obunga Langa</i> 135 East Main Street, Apt. A12 Westborough, MA 01581 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Emily Player</i> 8 Warren Place Framingham, MA 01701 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Caroline Yu</i> 25 Indian Pond Road Westborough, MA 01581 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Kudzai Gomwe</i> 25 Fenway Drive Framingham MA 01701 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Aaron Wilson Unga</i> 49 Westbrook Road Northborough, MA 01532 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Kristina Kloman</i> 11 Stanley St Natick, MA 01760 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Ruth Angelica Heredia</i> 32 Interfaith Terrace Apt. D Framingham, MA 01702 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Chaquanna Perry-George</i> 460 Boston Post Road, East Apt # B305 Marlborough, MA 01752 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Nancy Frimpong</i> 85 Broad Street, Apt. 325 Marlborough, MA 01752 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Ramatu Penseh</i> 33 Azalea Lane Marlborough, MA 01752 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Gladys Urzua</i> 27 Wilde Ave, Apt. 2 Framingham, MA 01702 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Dakota James Ribeiro</i> 11 Old North Road Hudson, MA 01749 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Danielle N. Carrier</i> 129 Beaver Street Milford, MA 01757 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Pauline Roy</i> 33 Deacon st Northborough, MA 01532 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Claudia Cifuentes</i> 65 Belmont St Ext Apt 3 Marlborough, MA 01752 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Molly DeMilia</i> 10 Cider Mill Road Framingham, MA 01701 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Marci Kling</i> 18 Femia Road Framingham, MA 01701 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Haleigh Sullivan</i> 22 Byard Lane Westborough, MA 01581 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Danielle Carson</i> 41 Hardwick Road Ashland, MA 01721 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Katelin A. Copithorne</i> 21 Hampden Road Framingham, MA 01702 \$2,000.00 2017	NC Non-Charity	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jamie Allard</i> 803 Pulaski Blvd Bellingham, MA 02019 \$1,000.00 2017	NC Non-Charity	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$0.00
RIA House Inc., - Ready.Inspire.Act 330 Cochituate Road, #1784 Framingham, MA 01701 <i>Capacity Building</i> \$1,750.00 2017	PC Public Charity	\$0.00	\$1,750.00	\$0.00	\$1,750.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
RIA House Inc., - Ready.Inspire.Act 330 Cochituate Road, #1784 Framingham, MA 01701 <i>Through the Eyes of People with Lived Experiences</i> \$5,000.00 2017	PC Public Charity	\$0.00	\$5,000.00	\$0.00	\$5,000.00	\$0.00
Riverside Community Care Riverside Community Care Outpatient Clinic 206 Milford St Upton, MA 01568 <i>A Pilot Program for Anxiety and Depression Management for Seniors Using Yoga-Cognitive Behavioral Therapy (Y-CBT)</i> \$19,999.52 2016	PC Public Charity	\$9,999.76	\$0.00	\$0.00	\$9,999.76	\$0.00
South Middlesex Opportunity Council, Inc. 7 Bishop Street Framingham, MA 01702 <i>SMOC Peer Recovery Coach Program</i> \$141,704.60 2017	PC Public Charity	\$0.00	\$141,704.60	\$0.00	\$108,132.20	\$33,572.40
South Middlesex Opportunity Council, Inc. 7 Bishop Street Framingham, MA 01702 <i>Community Response Team</i> \$75,323.00 2017	PC Public Charity	\$0.00	\$75,323.00	\$0.00	\$75,323.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
SPARK Kindness, Inc. PO Box 823 Natick, MA 01760 <i>SPARK Academy: Putting Principles into Practice</i> \$58,452.34 2016	PC Public Charity	\$29,226.17	\$0.00	\$0.00	\$29,226.17	\$0.00
SPARK Kindness, Inc. PO Box 823 Natick, MA 01760 <i>SPARK Academy: Putting Principles into Practice</i> \$46,475.82 2017	PC Public Charity	\$0.00	\$46,475.82	\$0.00	\$23,237.91	\$23,237.91
Town of Framingham 150 Concord Street Framingham, MA 01702 <i>Naloxone distribution via health departments</i> \$39,360.79 2017	PC Public Charity	\$0.00	\$39,360.79	\$0.00	\$39,360.79	\$0.00
University of Massachusetts Boston Center for Social & Demographic Research in Aging John W. McCormack Graduate School of Policy & Global Studies 100 Morrissey Blvd. Boston, MA 02125 <i>Social Isolation Workshops</i> \$11,695.44 2016	PC Public Charity	\$11,695.44	\$0.00	\$0.00	\$11,695.44	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Wayside Youth & Family Support Network, Inc. 1 Frederick Abbott Way Framingham, MA 01701 <i>The Milford Student Assessment & Intervention Program</i> \$200,487.91 2014	PC Public Charity	\$32,379.68	\$0.00	\$0.00	\$32,379.68	\$0.00
Wayside Youth & Family Support Network, Inc. 1 Frederick Abbott Way Framingham, MA 01701 <i>Children's Mental Health Care Navigator</i> \$143,996.00 2015	PC Public Charity	\$25,525.76	\$0.00	\$0.00	\$25,525.76	\$0.00
Wayside Youth & Family Support Network, Inc. 1 Frederick Abbott Way Framingham, MA 01701 <i>Meeting the Mental Health Needs of LGBTQ Youth</i> \$19,822.90 2016	PC Public Charity	\$9,911.45	\$0.00	\$0.00	\$9,911.45	\$0.00
Wayside Youth & Family Support Network, Inc. 1 Frederick Abbott Way Framingham, MA 01701 <i>Meeting the Mental Health Needs of LGBTQ Youth</i> \$43,097.00 2017	PC Public Charity	\$0.00	\$43,097.00	\$0.00	\$43,097.00	\$0.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Wayside Youth & Family Support Network, Inc. 1 Frederick Abbott Way Framingham, MA 01701 <i>Supporting, Increasing & Retaining Diverse and Culturally Competent Staff</i> \$14,336.43 2017	PC Public Charity	\$0.00	\$14,336.43	\$0.00	\$14,336.43	\$0.00
Wellesley College, Wellesley Centers for Women 106 Central Street Wellesley, MA 02481 <i>Teen(508): Addressing Depression in the Natick High School Community</i> \$369,536.00 2015	PC Public Charity	\$44,722.00	\$0.00	\$0.00	\$44,722.00	\$0.00
Wellesley College, Wellesley Centers for Women 106 Central Street Wellesley, MA 02481 <i>Depression Prevention for Middle School Students in Natick</i> \$89,814.00 2016	PC Public Charity	\$29,938.00	\$0.00	\$0.00	\$29,938.00	\$0.00
Wellesley College, Wellesley Centers for Women 106 Central Street Wellesley, MA 02481 <i>Depression/Suicide Prevention for Adolescents in Holliston</i> \$148,356.00 2017	PC Public Charity	\$0.00	\$148,356.00	\$0.00	\$79,512.00	\$68,844.00

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amended	Amount Paid	Ending Balance
Westborough Public Schools 45 West Main Street Westborough, MA 01581 <i>Westborough High School Center for Student Success</i> \$59,300.00 2016	PC Public Charity	\$15,450.00	\$0.00	\$0.00	\$10,950.00	\$4,500.00
William James College One Wells Avenue Newton, MA 02459 <i>INTERFACE Natick: Mental Health Resource & Referral</i> \$62,403.70 2016	PC Public Charity	\$31,201.85	\$0.00	\$0.00	\$31,201.85	\$0.00
Grand Totals (148 items)		\$1,506,808.77	\$3,720,467.94	\$0.00	\$3,389,553.59	\$1,837,723.12

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