This year’s report highlights some of the programs run by our community partners under our Healthy Aging Initiative. From respite care, to transportation, to help navigating doctor’s appointments, much is being done to make the MetroWest region a better place to grow older. This past year we also launched caregivingmetrowest.org, a new website hosted by BayPath Elder Services that provides comprehensive and tailored information and support to caregivers of older adults in each of our 25 communities.

In addition to our work on healthy aging, the foundation continues to support a variety of projects aimed at improving access to health insurance and primary medical care, behavioral health services to adolescents, and the development of our next generation of health care practitioners. A complete list of grants made this past year is included in the report.

On behalf of the foundation’s board of trustees, we wish to thank our many community partners, committee and panel members and other volunteers who helped support the work of the foundation this past year. Your efforts continue to make the foundation an important resource in “improving the health status of the community, its individuals and families.”

Dana Nehe, Chair, Board of Trustees  Martin Cohen, President/CEO
There are many positive aspects of aging in MetroWest—the prevalence of social activities and services and world-class medical care at your doorstep—but one area where services are not prevalent is transportation options for older adults. In order to fill this gap, ITN Greater Boston began offering door-to-door service for older and visually impaired adults in January 2012. Volunteer drivers pick up consumers at their homes and drive them to any destination within the service area, including medical appointments, grocery stores, religious services and friends’ homes. The program is unique in that it’s available 24 hours a day, 7 days a week and has never turned down a customer asking to travel within the service area. Since inception, ITN has provided over 6,000 rides to its 500 members.

The service provides added security and peace of mind for some. In the words of one regular user, “It has given me a sense of security and independence that I thought was gone.” For others it helps to take the burden off their family and stay engaged in meaningful activities. “I’ve been able to participate in many more church-related activities, and my husband, who normally drives me, has been able to devote more time to other activities.” There are some who would not get the medical care they need without the service. “Now I can make doctor appointments when I need to see a doctor before; I didn’t go as often as I should have because of difficulty finding transportation.”

TRANSPORTATION THAT IS IMPROVING QUALITY OF LIFE.
RESPITE CARE: ESSENTIAL TO THE HEALTH OF CAREGIVERS
Family and friends provide the vast majority of care to older adults in the United States. Most of us are not prepared to jump into the role of caregiver, but 75% of us will find ourselves in that role at some point in our lives. Supporting caregivers in a variety of ways is vital to their own health and that of their loved ones.

Respite care is one way caregivers can take that needed break without worrying about their loved one. The Medfield and Franklin Councils on Aging offer different models of respite care, both providing a vital service to those with dementia and other chronic diseases, as well as their often overwhelmed family members.

The Club at the Medfield Council on Aging offers on-site care for patients with dementia and other disabilities being cared for by family or friends. It provides enriching programming and social interaction for those that attend the program, but the benefits for their caregivers are perhaps more profound.

Mary and Helen have been happily married to their husbands for over 50 years. For both women their worlds slowly changed when their husbands were diagnosed with Alzheimer’s disease. The slow decline in health is now at a point where neither man can be left alone. They depend on their wives to meet their basic physical and emotional needs. As wonderful as they are as caregivers, both Mary and Helen also need time to care for themselves.

Both women were hesitant to leave their husbands at The Club the first day. They did not know what to expect and were cautious about leaving their husbands in the care of strangers. These fears were soon pushed aside when they saw how engaged the men were in the many activities, including singing, exercise and bingo. They have come to value the expertise of the staff and often ask questions about how to handle situations that arise at home. Mary and Helen have also developed a friendship with each other. The ability to talk to someone in a similar situation has helped them both feel more supported and less alone.

Another model of respite care that has been equally crucial to the lives of caregivers served is administered by the Franklin Council on Aging. The Companion Caregiver Program brings trained professional companion caregivers into the homes of dementia patients, giving their family caregivers much needed time outside the house. As they spend time in clients’ homes week after week and get to know family members, companion caregivers are also able to provide referrals to other services. This further decreases the stress and isolation family caregivers often feel.

In the words of one caregiver, “This service acts as a lifeline which gives marvelous care and understanding to its members. It allows me freedom for a few hours, having confidence in the excellent quality of care for my wife. The program makes my wife very happy and is expanding my lifetime as well.”

The personal attention companion caregivers are able to give clients in a one-on-one setting is a unique feature of the program. It provides an opportunity for individualized solutions to issues caregivers may be facing. For example, Marvin, a client with advanced dementia, had become constantly destructive, using his hands to tear up whatever he could find. His companion brought him indestructible items and a small remote control train, both of which served to ease his anxiety. These small changes have been invaluable to his wife’s ability to care for him.
A LITTLE SUPPORT GOES A LONG WAY

For many of us, going to the doctor is routine, but for others just the thought of entering an exam room leaves us anxious and flustered. In fact, the vast majority of Americans (88%) do not have proficient health literacy according to the U.S. Dept. of Health and Human Services. This means most of us leave the doctor not fully understanding our medical condition or what we need to do to remain healthy. The issue is compounded for older adults who may have trouble hearing, memory loss or are just not used to questioning a doctor.

The Patient Navigator Program at Jewish Family Service of Metropolitan is making trips to the doctor a little easier, less stressful and more productive for older adults. Trained volunteers or patient navigators, many of whom are retired medical professionals, accompany older adults to their appointment, helping them to list questions for the doctor, and taking notes about future appointments or prescriptions to be filled.

In the case of Tom, an older gentleman without family or friends who were in a position to help him, the program allowed him to receive care that transformed his quality of life. One night Tom was in excruciating pain so he drove himself to the emergency room. Tom was told he needed surgery and found a surgeon at a hospital over 30 miles away. Tom had no one who could drive him to the many appointments necessary before the surgery could be scheduled. He was ready to give up when he called the Patient Navigator Program. Instead of the rejection he anticipated, Tom was paired with a retired oncology nurse who agreed to drive him to the seven appointments he needed to prepare for his surgery. After a long recovery, Tom has returned home and his quality of life is much improved. This would not have been possible without the logistical and emotional support Tom received from his caring patient navigator.
Grants

Access to Care

Advocates, Inc.
$172,198.00 | To create a Pediatric Health Home by integrating behavioral health into the pediatric care team at Southcoast Medical Group

Edward M. Kennedy Community Health Center, Inc.
$214,396.00 | To increase the number of children and adults in the MetroWest region who will access primary and preventive care.

Health Care for All
$150,000.00 | To provide technical assistance and training to the foundations’ Access to Care grantees.

Latino Health Insurance Program, Inc.
$74,043.70 | To reduce the number of uninsured individuals and families in MetroWest.

Massachusetts Alliance of Portuguese Speakers
$33,244.95 | To reduce the number of uninsured individuals and families in MetroWest.

MetroWest Free Medical Program
$37,035.00 | To reduce the number of uninsured individuals and families in MetroWest.

MetroWest Legal Services
$65,000.00 | To create a medical-legal partnership with the Edward M. Kennedy Community Health Center in Framingham.

Adolescent Mental Health

Assabet Valley Regional Technical School
$120,000.00 | To provide a nursery and stabilization program for students returning from hospitalization or long-term absences.

Blackstone Valley Regional Vocational School District
$100,000.00 | To provide a nursery and stabilization program for students returning from hospitalization or long-term absences.

Framingham Public Schools
$57,465.00 | To provide a mental health coordinator at Framingham High School.

Lincoln-Sudbury Regional High School
$200,000.00 | To provide a nursery and stabilization program for students returning from hospitalization or long-term absences.

Natick Public Schools
$371,406.00 | To address the behavioral health needs of students.

New Brunswick Public Schools
$53,471.00 | To implement a plan that bolsters the continuum of mental health supports for high-risk middle and high school students and their families.

Waypoint Youth & Family Support Network, Inc.
$232,533.41 | To provide immediate access to behavioral health services for children and adolescents in the Framingham schools.

Waypoint Youth & Family Support Network, Inc.
$380,497.67 | To provide mildford students with access to adolescent mental health services focused on depression.

Health Policy

National Alliance On Mental Illness of Massachusetts
$35,800.00 | To support municipal and state police departments in developing best practices for responding safely and respectfully to people with mental illness.

Healthy Affordable

Advocates, Inc.
$14,000.00 | To provide telephone-based pre- health educational support to improve the mental and physical health of caregivers.

Advocates, Inc.
$31,000.00 | To reduce the incidence of substance abuse/substance abuse, including prescription medication misuse or abuse among older adults.

Rutland Elder Services, Inc.
$39,500.00 | To support the implementation of caregivinginsurance.org.

Edward M. Kennedy Community Health Center, Inc.
$328,906.00 | To improve the ability of bringing the PC-0 (Program of All Inclusive Care for the Elderly) program to MetroWest.

Wayside Youth & Family Support Network, Inc.
$145,893.00 | To help older people living with HIV/AIDS manage chronic health conditions.

Healthy Aging

Reach Beyond Domestic Violence Inc.
$200,000.00 | To purchase an advanced simulator to enhance the skills of EMDs providers.

United Way of Saint Joseph
$56,960.00 | To increase access to medical-specific foods for seniors in Framingham and Marlborough.

Supporting Healthy Communities

Hudson Board of Health
$24,980.30 | To provide 10% matching support to the Public Health Prevention Wellness Trust Fund project in MetroWest.

Massachusetts Department of Public Health
$150,000.00 | To support the Mass in Motion program to promote active living and healthy eating in the towns of Framingham, Hudson, Marlborough and Northborough.

MetroWest Area Planning Council
$8,465.00 | To train and equip area first responders with naloxone to prevent opiate overdose.

Town of Natick, Board of Health
$118,372.75 | To form a regional multi-town collaborative to adopt evidence-based tobacco control policies and practices.

Scholarships

Medical/Clinical Scholarships (10) $13,000.00

Nursing Scholarships (10) $50,000.00

Community Health Awards

Sam Morgan, Ph.D.
Beth Donnelly
### 2015 Health Leadership Program

**Board of Trustees**
- Joel Barrera, Vice Chair
- Cynthia Bechtel, Ph.D.
- Anne Marie Boursiquot King
- Rosamaria Coelho, Clerk
- Maria DaSilva
- Alan Geller
- John Krikorian, M.D.
- Meyer Levy
- Regina Marshall, Esq.
- Dana Neshé, Chair
- Julie Reed
- Adam Rogers, Treasurer

**Framingham Union Grants Panel**
- Karin Agte
- Anna Carollo Cross
- Betsy Cross
- Michael Devlin
- Nancy Morse-Bey  
  (term expired 5/31/14)
- Anna Romer, Ed.D.
- Cheryl Tully Stoll  
  (term expired 5/31/14)

**Leonard Morse Grant Panel**
- Jay H. Ball
- Christopher Barthlin, Esq.
- Donna Baer, Ed.D.
- Marenore Nguyen
- Virginia Savry

**Framingham Vision-Grants Panel**
- Karen Agta
- Anna Carollo Cross
- Betty Cross
- Michael Devlin
- Nancy Morse-Bey  
  (term expired 5/31/14)
- Anna Romer, Ed.D.
- Cheryl Tully Stoll  
  (term expired 5/31/14)

**Scholarship Committee**
- Cynthia Bechtel, Ph.D., Chair
- Maria DaSilva
- Michael Devlin
- Marenore Nguyen

**Personnel Committee**
- Cynthia Bechtel, Ph.D.
- Rosamaria Coelho, Chair
- John Krikorian, M.D.
- Dana Neshé

**Nominating Committee**
- Joel Barrera, Chair
- Maria DaSilva
- Regina Marshall, Esq.
- Dana Neshé

**Audit Committee**
- Robert Adenour
- Frank C. Jenkins
- Meyer Levy
- William G. McCarthy
- John A. Merritt

**Investment Committee**
- James J. Connelly
- Robert Delfaney
- Kevin Foley
- Frank C. Jenkins
- Meyer Levy
- Michael Moody
- Thomas More
- Adam Rogers, Chair
- Brian Stewart
- Thomas Umans
- J. Ben Williams

### Governance

The Board of Trustees has engaged Alexander, Aronson & Finning, Certified Public Accountants, of Westborough, Massachusetts to perform the annual audit. A copy of their complete audit report is available for review from the Foundation.

### 2014 Financials

**Statement of Financial Position, September 30, 2014**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and Equivalents</td>
<td>$696,313</td>
<td>$273,676</td>
</tr>
<tr>
<td>Investments</td>
<td>96,030,549</td>
<td>92,292,026</td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td><strong>$104,379,556</strong></td>
<td><strong>$99,955,446</strong></td>
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<tr>
<td><strong>LIABILITIES &amp; NET ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accrued Expenses and Other</td>
<td>$200,237</td>
<td>$390,890</td>
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<tr>
<td>Deferred Excise Taxes</td>
<td>505,731</td>
<td>385,618</td>
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<tr>
<td><strong>Total liabilities</strong></td>
<td><strong>2,074,590</strong></td>
<td><strong>2,521,273</strong></td>
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<tr>
<td><strong>Net assets</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>83,244,335</td>
<td>81,340,897</td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td>2,291,283</td>
<td>6,581,043</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td><strong>85,535,618</strong></td>
<td><strong>87,921,940</strong></td>
</tr>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$104,379,556</strong></td>
<td><strong>$99,955,446</strong></td>
</tr>
</tbody>
</table>

**Statement of Activities, September 30, 2014**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct charitable grants &amp; programs</td>
<td>3,102,476</td>
<td>3,134,109</td>
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<tr>
<td>Grant related and administrative</td>
<td>734,891</td>
<td>1,035,094</td>
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<tr>
<td>Investment related</td>
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<td>953,882</td>
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<tr>
<td><strong>Total revenues</strong></td>
<td><strong>5,590,895</strong></td>
<td><strong>5,123,085</strong></td>
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<tr>
<td><strong>EXPENSES</strong></td>
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<td></td>
</tr>
<tr>
<td>Change in net assets</td>
<td><strong>4,830,793</strong></td>
<td><strong>5,400,977</strong></td>
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<tr>
<td><strong>NET ASSETS, beginning of year</strong></td>
<td><strong>9,454,137</strong></td>
<td><strong>9,033,186</strong></td>
</tr>
<tr>
<td><strong>NET ASSETS, end of year</strong></td>
<td><strong>$102,304,966</strong></td>
<td><strong>$97,434,137</strong></td>
</tr>
</tbody>
</table>

| **ASSETS**    |              |              |
| Cash and Equivalents               | $696,313     | $273,676     |
| Investments                           | 96,030,549   | 92,292,026   |
| **Total assets**                  | **$104,379,556** | **$99,955,446** |
| **LIABILITIES & NET ASSETS**       |              |              |
| Accrued Expenses and Other           | $200,237     | $390,890     |
| Deferred Excise Taxes                | 505,731      | 385,618      |
| **Total liabilities**               | **2,074,590** | **2,521,273** |
| **Net assets**                      |              |              |
| Unrestricted                         | 83,244,335   | 81,340,897   |
| Temporarily Restricted               | 2,291,283    | 6,581,043    |
| **Total net assets**                | **85,535,618** | **87,921,940** |
| **Total liabilities and net assets**| **$104,379,556** | **$99,955,446** |
Our Mission: 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, Hopkinton, Hudson, Marlborough, Medfield, Medway, Mendon, Millis, Natick, Needham, Norfolk, Northborough, Sherborn, Southborough, Sudbury, Wayland, Wellesley, and Westborough.

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

Making a Gift to the Foundation: You can support the work of the MetroWest Health Foundation by making a tax-deductible contribution or by including the foundation in your estate planning. The foundation can assist you in planning a bequest or charitable donation to benefit the health needs of your community. For more information or assistance, contact us at 508.879.7625.

Becoming a Volunteer: The work of the foundation is largely volunteer. Members of the MetroWest community serve on committees and panels that shape the work of the foundation. If you have an interest in serving on a committee or panel, please let us know.

Questions: We encourage questions about our grantmaking and community health activities, and welcome opportunities to meet with or speak to community groups and individuals about our funding philosophies, priorities and grantmaking process.