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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2011

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2011 or tax year beginning OCT 1, 2011, and ending SEP 30, 2012

Name of foundation METROWEST COMMUNITY HEALTH CARE 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, and ZIP 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"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) \$ 93,950,109.	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	393,816.			
	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	1,427,060.	1,427,060.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<89,168.>			
	b Gross sales price for all assets on line 6a	4,621,218.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	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	1,731,708.	1,427,060.	0.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	245,840.	29,068.	0.	216,772.
	14 Other employee salaries and wages	273,226.	0.	0.	273,226.
	15 Pension plans, employee benefits	165,063.	9,714.	0.	155,349.
	16a Legal fees STMT 2	1,360.	0.	0.	1,360.
	b Accounting fees STMT 3	33,461.	0.	0.	33,461.
	c Other professional fees STMT 4	213,119.	50,939.	0.	162,180.
	17 Interest				
	18 Taxes STMT 5	215,621.	0.	0.	0.
	19 Depreciation and depletion	8,669.	0.	0.	
	20 Occupancy	102,678.	5,107.	0.	97,571.
	21 Travel, conferences, and meetings	25,280.	0.	0.	25,280.
	22 Printing and publications	28,105.	0.	0.	28,105.
	23 Other expenses STMT 6	614,874.	520,666.	0.	94,208.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,927,296.	615,494.	0.	1,087,512.
	25 Contributions, gifts, grants paid	1,868,522.			2,079,213.
26 Total expenses and disbursements. Add lines 24 and 25	3,795,818.	615,494.	0.	3,166,725.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<2,064,110.>				
b Net investment income (if negative, enter -0-)		811,566.			
c Adjusted net income (if negative, enter -0-)			0.		

**METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.**

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	48,770.	36,045.	36,045.
	2 Savings and temporary cash investments	357,729.	123,966.	123,966.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	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	37,959.	37,797.	37,797.
	10a Investments - U.S. and state government obligations STMT 8	1,137,895.	1,201,584.	1,201,584.
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	76,747,009.	85,496,529.	85,496,529.
Liabilities	14 Land, buildings, and equipment: basis ▶ 126,949. Less: accumulated depreciation STMT 10 ▶ 116,812.	2,957.	10,137.	10,137.
	15 Other assets (describe ▶ STATEMENT 11)	6,485,411.	7,044,051.	7,044,051.
	16 Total assets (to be completed by all filers)	84,817,730.	93,950,109.	93,950,109.
	17 Accounts payable and accrued expenses	328,955.	324,265.	
	18 Grants payable	1,512,384.	1,301,693.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 12)	169,118.	290,955.	
	23 Total liabilities (add lines 17 through 22)	2,010,457.	1,916,913.	
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	68,975,469.	76,833,417.	
	25 Temporarily restricted	5,213,384.	5,972,785.	
	26 Permanently restricted	8,618,420.	9,226,994.	
	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	82,807,273.	92,033,196.	
	31 Total liabilities and net assets/fund balances	84,817,730.	93,950,109.	

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	82,807,273.
2 Enter amount from Part I, line 27a	2	<2,064,110.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	11,290,033.
4 Add lines 1, 2, and 3	4	92,033,196.
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	92,033,196.

**METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.**
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 PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b INVESTMENT PARTNERSHIPS	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 3,310,291.		2,881,064.	429,227.
b 1,310,927.		1,829,322.	<518,395.>
c			
d			
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			429,227.
b			<518,395.>
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> 2 <div style="border-left: 1px solid black; padding-left: 10px;"><89,168.></div> </div> </div>
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	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 </div> <div style="margin-left: 10px;"> 3 <div style="border-left: 1px solid black; padding-left: 10px;">N/A</div> </div> </div>

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 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))
2010	4,652,835.	84,537,196.	.055039
2009	4,414,314.	79,147,832.	.055773
2008	4,871,037.	71,563,814.	.068066
2007	6,755,747.	104,184,952.	.064844
2006			

2 Total of line 1, column (d)	2	.243722
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	.060931
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	83,021,127.
5 Multiply line 4 by line 3	5	5,058,560.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,116.
7 Add lines 5 and 6	7	5,066,676.
8 Enter qualifying distributions from Part XII, line 4	8	3,182,574.

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)		1	16,231.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
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	16,231.
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	16,231.
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a 21,168.		
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	21,168.
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	4,937.
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax 4,937. Refunded		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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
1c 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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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? If "Yes," attach a conformed copy of the changes		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?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MA</u>		
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? If "No," attach explanation	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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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FOUNDATION, INC.**

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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)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.MWHEALTH.ORG	13	X	
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 2011, 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 Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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.

	Yes	No
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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	N/A	1b
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 2011?		1c X
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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	N/A	2b
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2011 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 2011)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
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 2011?		4b X

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FOUNDATION, INC.**

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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 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ 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)?

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? **N/A** ☐ Yes ☐ No

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

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? **N/A**

5b

X

6b

X

7b

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 13		245,840.	50,631.	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.	82,812.	30,291.	0.
CATHY GLOVER - 161 WORCESTER RD, FRAMINGHAM, MA 01701	GRANT MGMT DIR.	84,834.	25,985.	0.
RAMANI SRIPADA - 161 WORCESTER RD, FRAMINGHAM, MA 01701	PROGRAM OFFICER	62,835.	27,936.	0.

Total number of other employees paid over \$50,000

0

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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."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SIGMAWORKS		
17 ROSEMARY STREET, NEEDHAM, MA 02494	HEALTH DATA ANALYSIS	58,787.
PRIME BUCHHOLZ & ASSOCIATES	INVESTMENT	
273 CORPORATE DRIVE, PORTSMOUTH, NH 03801	CONSULTING	50,939.

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
SEE STATEMENT 14	338,156.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
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	83,794,746.
b	Average of monthly cash balances	1b	490,662.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	84,285,408.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	84,285,408.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,264,281.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	83,021,127.
6	Minimum investment return Enter 5% of line 5	6	4,151,056.

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	4,151,056.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	16,231.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	16,231.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,134,825.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,134,825.
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	4,134,825.

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	3,166,725.
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	15,849.
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	3,182,574.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	3,182,574.

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 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				4,134,825.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007	1,660,458.			
c From 2008	1,302,232.			
d From 2009	475,338.			
e From 2010	453,799.			
f Total of lines 3a through e	3,891,827.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► \$ 3,182,574.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions) **	357,232.			
d Applied to 2011 distributable amount				2,825,342.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	1,309,483.			1,309,483.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,939,576.			
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 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	357,232.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	2,582,344.			
10 Analysis of line 9:				
a Excess from 2007	350,975.			
b Excess from 2008	1,302,232.			
c Excess from 2009	475,338.			
d Excess from 2010	453,799.			
e Excess from 2011				

** SEE STATEMENT 15

Form 990-PF (2011)

N/A

- ☐ 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

[illegible]Form **990-PF** (2011)

**METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.**
Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a Paid during the year				
SEE ATTACHED				2,079,213.
Total			▶ 3a	2,079,213.
b Approved for future payment				
SEE ATTACHED				1,301,693.
Total			▶ 3b	1,301,693.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

123621
12-02-11

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No 1545-0047

2011

Name of the organization

METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.

Employer identification number

04-2121342

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.

Employer identification number

04-2121342

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHICKERING TRUST C/O MELLON BANK ONE BOSTON PLACE BOSTON, MA 02108	\$ 330,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	CLARK TRUST C/O BANK OF AMERICA TWO PORTLAND SQ. PORTLAND, ME 04101	\$ 15,373.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
3	PFAFF FUND C/O BOSTON FOUNDATION 75 ARLINGTON ST. BOSTON, MA 02116	\$ 36,584.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4	SARAH WHITE TRUST C/O BANK OF AMERICA 100 FEDERAL STREET BOSTON, MA 02110	\$ 11,859.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Employer identification number

04-2121342

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization

**METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.**

Employer identification number

04-2121342

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ► \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
INVESTMENT PARTNERSHIPS & SIMILAR ENTITIES	192,220.	0.	192,220.
SECURITIES	1,234,840.	0.	1,234,840.
TOTAL TO FM 990-PF, PART I, LN 4	1,427,060.	0.	1,427,060.

FORM 990-PF	LEGAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	1,360.	0.	0.	1,360.
TO FM 990-PF, PG 1, LN 16A	1,360.	0.	0.	1,360.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	33,461.	0.	0.	33,461.
TO FORM 990-PF, PG 1, LN 16B	33,461.	0.	0.	33,461.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	213,119.	50,939.	0.	162,180.
TO FORM 990-PF, PG 1, LN 16C	213,119.	50,939.	0.	162,180.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CURRENT EXCISE TAX EXPENSE	17,195.	0.	0.	0.
DEFERRED EXCISE TAX EXPENSE	198,426.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	215,621.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WEB & COMPUTER SUPPORT	28,843.	0.	0.	28,843.
INSURANCE	6,629.	0.	0.	6,629.
EQUIPMENT RENTAL	7,310.	0.	0.	7,310.
OFFICE SUPPLIES AND SUPPORT	51,426.	0.	0.	51,426.
INVESTMENT FEES	520,666.	520,666.	0.	0.
TO FORM 990-PF, PG 1, LN 23	614,874.	520,666.	0.	94,208.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
UNREALIZED GAIN ON INVESTMENTS	10,681,459.
GAIN ON BENEFICIAL INTERESTS IN PERPETUAL TRUSTS	608,574.
TOTAL TO FORM 990-PF, PART III, LINE 3	11,290,033.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US GOVERNMENT OBLIGATIONS -FIXED INCOME	X		1,201,584.	1,201,584.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,201,584.	1,201,584.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,201,584.	1,201,584.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS-FIXED INCOME	FMV	19,262,434.	19,262,434.
MUTUAL FUNDS-EQUITIES	FMV	26,910,513.	26,910,513.
EQUITY HEDGE FUNDS OF FUNDS	FMV	32,761,294.	32,761,294.
COMMODITIES FUND	FMV	6,562,288.	6,562,288.
PUBLIC/PRIVATE REAL ASSETS	FMV	0.	0.
TOTAL TO FORM 990-PF, PART II, LINE 13		85,496,529.	85,496,529.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	10
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FIXED ASSETS	126,949.	116,812.	10,137.
TOTAL TO FM 990-PF, PART II, LN 14	126,949.	116,812.	10,137.

FORM 990-PF	OTHER ASSETS	STATEMENT 11
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
BENEFICIAL INTERESTS IN PERPETUAL TRUSTS	6,424,463.	7,033,037.	7,033,037.
DEFERRED COMPENSATION INVESTMENTS - METROWEST HEALTH, INC.	41,711.	0.	0.
PREPAID EXCISE TAXES	19,237.	11,014.	11,014.
TO FORM 990-PF, PART II, LINE 15	6,485,411.	7,044,051.	7,044,051.

FORM 990-PF	OTHER LIABILITIES	STATEMENT 12
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED COMPENSATION LIABILITY - METROWEST HEALTH, INC.	41,711.	0.
DEFERRED EXCISE TAXES	74,323.	272,221.
FUNDS HELD FOR OTHERS	53,084.	18,734.
TOTAL TO FORM 990-PF, PART II, LINE 22	169,118.	290,955.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 13

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	245,840.	50,631.	0.
HENRY BARR 161 WORCESTER RD. FRAMINGHAM, MA 01701	CHAIR 5.00	0.	0.	0.
DANA NESHE 161 WORCESTER RD. FRAMINGHAM, MA 01701	VICE CHAIR 5.00	0.	0.	0.
JOEL BARRERA 161 WORCESTER RD. FRAMINGHAM, MA 01701	CLERK 5.00	0.	0.	0.
ROSEMARIE COELHO 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
KEVIN FOLEY 161 WORCESTER RD. FRAMINGHAM, MA 01701	TREASURER 5.00	0.	0.	0.
ANNE MARIE BOURSIQUOT KING 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
CYNTHIA BECHTEL 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
MARIA DASILVA 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
ARNOLD SOSLOW, M.D. 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.
ADAM ROGERS 161 WORCESTER RD. FRAMINGHAM, MA 01701	TRUSTEE 1.00	0.	0.	0.

REGINA MARSHALL	TRUSTEE			
161 WORCESTER RD.	1.00	0.	0.	0.
FRAMINGHAM, MA 01701				

MEYER LEVY	TRUSTEE			
161 WORCESTER RD.	1.00	0.	0.	0.
FRAMINGHAM, MA 01701				

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII	245,840.	50,631.	0.
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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	14
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ACTIVITY ONE

1) THE FOUNDATION PROVIDED 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 OVER \$1.8 MILLION IN NEW GRANTS TO NON-PROFIT COMMUNITY ORGANIZATIONS AND MUNICIPAL GOVERNMENTS TO IMPROVE THE HEALTH OF THE METROWEST RESIDENTS. THESE GRANTS SUPPORT A VARIETY OF PROGRAMS THAT SERVE ELDERS, YOUTH AND SPECIAL POPULATIONS SUCH AS THE HOMELESS AND INDIGENT.

3) THE FOUNDATION PROVIDED \$118,699 IN SCHOLARSHIPS ENABLING 69 INDIVIDUALS TO PURSUE DEGREE PROGRAMS IN NURSING, MEDICINE AND ALLIED HEALTH PROFESSIONS.

4) THE FOUNDATION SPONSORED THE METROWEST HEALTH LEADERSHIP PROGRAM, OFFERING LEADERSHIP TRAINING TO TEN INDIVIDUALS FROM HEALTH AND HUMAN SERVICES AGENCIES WITHIN OUR SERVICE AREA. THE FOUNDATION ALSO SPONSORED AN EVALUATION INSTITUTE TO INCREASE OUR GRANTEE'S UNDERSTANDING OF PROGRAM EVALUATION AND MEASUREMENT.

EXPENSES

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

338,156.

FORM 990-PF

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

STATEMENT 15

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- \$330,000
2. CLARK TRUST C/O BANK OF AMERICA- \$15,373
3. SARAH WHITE TRUST C/O BANK OF AMERICA- \$11,859

FORM 990-PF

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

STATEMENT 16

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MARTIN COHEN, PRESIDENT, METROWEST COMMUNITY HEALTH CARE 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 COMMUNITY HEALTH CARE 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.

Depreciation and Amortization 990-PF
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

Name(s) shown on return

Business or activity to which this form relates

Identifying number

**METROWEST COMMUNITY HEALTH CARE
FOUNDATION, INC.****FORM 990-PF PAGE 1****04-2121342****Part I Election To Expense Certain Property Under Section 179** Note: If you have any listed property, complete Part V before you complete Part I

1	Maximum amount (see instructions)	1	500,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	2,000,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2010 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2012. Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	8,669.

Part III MACRS Depreciation (Do not include listed property) (See instructions)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2011	17	
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2011 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property	/		27 5 yrs	MM	S/L	
	/		27 5 yrs	MM	S/L	
i Nonresidential real property	/		39 yrs	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2011 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year	/		40 yrs	MM	S/L	

Part IV Summary (See instructions)

21	Listed property. Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see instr	22	8,669.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V

Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)

Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A - Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
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25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use **25**

26 Property used more than 50% in a qualified business use

		%						
		%						
		%						

27 Property used 50% or less in a qualified business use:

		%			S/L -		
		%			S/L -		
		%			S/L -		

28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 **28**

29 Add amounts in column (i), line 26. Enter here and on line 7, page 1 **29**

Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle	(b) Vehicle	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners.		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
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42 Amortization of costs that begins during your 2011 tax year:

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43 Amortization of costs that began before your 2011 tax year **43**

44 Total. Add amounts in column (f). See the instructions for where to report **44**

Schedule of Appropriations and Payments

Fiscal Year 2012

9/30/2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Advocates, Inc. Suite 305 1 Clarks Hill Framingham, MA 01702 <i>BRITE Program at Marlborough Hospital</i> \$49,999 00 2012	509a(1)	\$0.00	\$49,999.00	\$24,999.50	\$24,999.50
Advocates, Inc. Suite 305 1 Clarks Hill Framingham, MA 01702 <i>Primary Care Health Model</i> \$5,076.00 2012	509a(1)	\$0.00	\$5,076.00	\$5,076.00	\$0.00
Assabet Valley Collaborative 51 Orchard Street Maulboro, MA 01752 <i>Family Success Partnership</i> \$300,000.00 2009		\$50,000.00	\$0.00	\$50,000.00	\$0.00
BayPath Elder Services, Inc. 33 Boston Post Road West Marlborough, MA 01752-1853 <i>Aging Well Together</i> \$24,200 00 2011	509a(1)	\$12,100.00	\$0.00	\$12,100.00	\$0.00
BayPath Elder Services, Inc. 33 Boston Post Road West Marlborough, MA 01752-1853 <i>MetroWest Caregiver WebConnect</i> \$59,691.00 2012	509a(1)	\$0.00	\$59,691.00	\$0.00	\$59,691.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Bridgewater State University Foundation Boyden Hall	501c(3)	\$16,350.00	\$0.00	\$13,867.00	\$0.00
131 Summer Street Bridgewater, MA 02325					
MARC Technical Assistance for Bullying Prevention					
\$30,217.00					
2010					
Council on Foundations		\$0.00	\$9,680.00	\$9,680.00	\$0.00
2121 Crystal Drive, Suite 700 Arlington, VA 22202					
Membership Dues 2012					
\$9,680.00					
2012					
Education Development Center, Inc. 43 Foundry Avenue Waltham, MA 02453-8313	501c(3)	\$0.00	\$0.00	-\$500.00	\$0.00
Technical Assistance for the Youth Substance Abuse Initiative 2008					
\$221,500.00					
2008					
Education Development Center, Inc. 43 Foundry Avenue Waltham, MA 02453-8313	501c(3)	\$449,997.00	\$0.00	\$299,998.00	\$149,999.00
2012 MetroWest Adolescent Health Survey					
\$599,996.00					
2011					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Edward M. Kennedy Community Health Center	501c(3)	\$250,000.00	\$0.00	\$0.00	\$250,000.00
2000 Century Drive Worcester, MA 01606					
Edward M. Kennedy Health Center (Framingham)					
\$1,000,000.00					
2010					
Edward M. Kennedy Community Health Center	501c(3)	\$0.00	\$10,000.00	\$10,000.00	\$0.00
2000 Century Drive Worcester, MA 01606					
Process Improvement Grant - Re-Engaging High-Risk Diabetic Patients Pilot					
\$10,000.00					
2012					
Framingham Public Schools 31 Flagg Drive #2		\$0.00	\$150,000.00	\$75,000.00	\$75,000.00
Framingham, MA 01702-5928 FHS Clinical Care Coordination					
\$150,000.00					
2012					
Framingham State University 100 State Street Dwight Hall	Other	\$27,887.50	\$0.00	\$27,887.50	\$0.00
Framingham, MA 01701 MetroWest Schools Food and Nutrition Environmental Scan					
\$55,775.00					
2010					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Framingham State University 100 State Street Dwight Hall Framingham, MA 01701 <i>Expansion of the Lifelong Learning Series Program</i>	Other	\$9,975.00	\$0.00	\$9,975.00	\$0.00
\$19,950.00 2011					
Framingham State University 100 State Street Dwight Hall Framingham, MA 01701 <i>Adventures in Lifelong Learning Program</i>	Other	\$0.00	\$16,900.00	\$8,450.00	\$8,450.00
\$16,900.00 2012					
Franklin Council on Aging 10 McCahill Street Franklin, MA 02038 <i>Franklin/Medway Councils on Aging Fall Prevention Program</i>	Other	\$6,686.50	\$0.00	\$6,686.50	\$0.00
\$13,373.00 2011					
Grant Makers in Health 1100 Connecticut Ave, NW Suite 1200 Washington, DC 20036 <i>Membership Dues</i>	501c(3)	\$0.00	\$3,250.00	\$3,250.00	\$0.00
\$3,250.00 2012					
Grantmakers for Effective Organizations 1725 DeSales Street, NW Suite 404 Washington, DC 20036 <i>Membership Dues</i>		\$0.00	\$1,725.00	\$1,725.00	\$0.00
\$1,725.00 2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Health Care For All 30 Winter Street, 10th Floor Boston, MA 02108 <i>MassHealth Adult Dental Restoration Community Action Program</i> \$25,000.00 2012	501c(3)	\$0.00	\$25,000.00	\$12,500.00	\$12,500.00
Milford Regional Healthcare Foundation 17 Winter Street Milford, MA 01757 <i>Health Disparities</i> \$12,000.00 2011	501c(3)	\$6,000.00	\$0.00	\$6,000.00	\$0.00
Holliston Public Schools 370 Hollis Street Holliston, MA 01746 <i>Grant to Prevent Bullying Among Middle School Students</i> \$39,666.68 2011		\$39,666.68	\$0.00	\$0.00	\$39,666.68
Hopkinton Public Schools 89 Hayden Rowe Street Hopkinton, MA 01748 <i>Building a Positive School Climate in Hopkinton Middle School</i> \$29,750.02 2011	Municipality of Government	\$39,666.68	\$0.00	\$9,916.66	\$29,750.02
Hudson Board of Health 78 Main Street Hudson, MA 01749 <i>CDC Public Health Community Transformation Grant</i> \$60,000.00 2012	Municipality of Government	\$0.00	\$60,000.00	\$60,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Hudson Board of Health					
78 Main Street	Municipality	\$0 00	\$181,586.00	\$30,264.33	\$151,321.67
Hudson, MA 01749	of				
<i>Hudson Adolescent Substance Use</i>	Government				
<i>Intervention Initiative</i>					
\$181,586 00					
2012					
Hudson Public Schools					
155 Apsley Street		\$39,666.68	\$0.00	\$19,833.32	\$19,833.36
Hudson, MA 01749					
<i>Bullying Prevention Project</i>					
\$59,500.00					
2011					
ITN Greater Boston, Inc.					
34 Deloss Street		\$0 00	\$143,944 00	\$71,972 00	\$71,972.00
Framingham, MA 01702					
<i>Transportation</i>					
\$143,944.00					
2012					
Jewish Family Service of Metrowest					
475 Franklin Street, Suite 101	501c(3)	\$12,495.00	\$0.00	\$12,495.00	\$0 00
Framingham, MA 01702					
<i>Managing Diabetes in Seniors A</i>					
<i>Community/Medical Partnership</i>					
\$24,990.00					
2011					
Jewish Family Service of Metrowest					
475 Franklin Street, Suite 101	501c(3)	\$0.00	\$22,486 00	\$11,243.00	\$11,243.00
Framingham, MA 01702					
<i>Managing Diabetes in Seniors A</i>					
<i>Community Medical Partnership Year II</i>					
\$22,486 00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Justice Resource Institute, Inc. 545 Boylston Street, Suite 700 Boston, MA 02116 <i>Healthy Aging with HIV</i> \$50,000.00 2012	501(c)(3)	\$0.00	\$50,000.00	\$25,000.00	\$25,000.00
Community Legal Aid 405 Main Street Worcester, MA 01608 <i>Milford Health Advocacy Project</i> \$18,000.00 2012	501(c)(3)	\$0.00	\$18,000.00	\$18,000.00	\$0.00
Marlborough Public Schools District Education Center 17 Washington Street Marlborough, MA 01752-2225 <i>Promoting Active Lifestyles (PAL)</i> <i>Continuation Grant</i> \$49,080.79 2008		\$0.00	\$0.00	-\$919.20	\$0.00
Medfield Council on Aging One Ice House Road Medfield, MA 02052 <i>Adult Respite Care Program</i> \$32,676.00 2012		\$0.00	\$32,676.00	\$32,676.00	\$0.00
Health Resources In Action 95 Berkeley Street Boston, MA 02116 <i>ITN Greater Boston</i> \$119,364.00 2011		\$59,682.00	\$0.00	\$59,682.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Framingham, MA 01701					
<i>Lisa Ferrelli</i>					
<i>8 Courtland Lane</i>					
<i>Ashland, MA 01721</i>					
\$1,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Jennifer Mazier</i>					
<i>4 Trettel Drive</i>					
<i>Milford, MA 01757</i>					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Ainsley Jones</i>					
<i>195 Beacon Street, Apt 6</i>					
<i>Boston, MA 02116</i>					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Ariana Succi</i>					
<i>33 Pennsylvania Ave</i>					
<i>Needham, MA 02492</i>					
\$2,000.00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Medical/Clinical Scholarships					
161 Worcester Road		\$0 00	\$2,000.00	\$2,000 00	\$0 00
Framingham, MA 01701					
Janice Cha					
7 Waring Road					
Natick, MA 01760					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0 00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Megan Rohr					
15 Rolling Lane					
Hudson, MA 01749					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0 00	\$1,000.00	\$1,000.00	\$0.00
Framingham, MA 01701					
Wilma de la Zerda					
13 Oran Road					
Framingham, MA 01702					
\$1,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0 00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Michael J McGowan					
57 Oxford Drive					
Franklin, MA 02038					
\$2,000 00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Matthew Donovan</i>					
<i>29 Beatrice Lane</i>					
<i>Holliston, MA 01746</i>					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Katherine Cerulo</i>					
<i>23 Westfield Road</i>					
<i>Natick, MA 01760</i>					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Framingham, MA 01701					
<i>Katharine Budra</i>					
<i>7 Crestwood Drive</i>					
<i>Ashland, MA 01721</i>					
\$1,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
<i>Jillian Sannicandro</i>					
<i>35 Hillside Road</i>					
<i>Ashland, MA 01721</i>					
\$2,000.00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Dennis Lau					
15 Langdon Road					
Wayland, MA 01778					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Claire McCarthy					
15 Pleasant St					
Wayland, MA 01778					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Charlotte Hannon					
800 Central Avenue					
Needham, MA 02492					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Ariana Succi					
33 Pennsylvania Ave					
Needham, MA. 02492					
\$2,000.00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Alison Rooney					
64 Parkinson Street					
Needham, MA 02492					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Abigail Santos					
9 Cape Rd					
Mendon, MA 01756					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Violet Chang					
925 Worcester Street					
Wellesley, MA 02482					
\$2,000.00					
2012					
Medical/Clinical Scholarships					
161 Worcester Road		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Framingham, MA 01701					
Emily Bright					
39 Walnut Street, Apt 3F					
Natick, MA 01760					
\$2,000.00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Metropolitan Area Planning Council 60 Temple Place Boston, MA 02111 <i>Establishment of a Public Health Shared Services District between the Towns of Ashland, Holliston, Hopkinton, and Medway</i>	Municipality of Government	\$69,556.24	\$0.00	\$23,185.42	\$46,370.82
\$139,112.50 2010					
MetroWest Free Medical Program c/o Congregation Beth El 105 Hudson Rd. Sudbury, MA 01776 <i>Multidisciplinary Chronic Disease Prevention and Education Program</i>	501(c)(3)	\$0.00	\$40,020.00	\$40,020.00	\$0.00
\$40,020.00 2012					
MetroWest Legal Services, Inc. 63 Fountain Street, Suite 304 Framingham, MA 01702 <i>KidsCare Connection</i>	509a(1)	\$79,104.00	\$0.00	\$79,104.00	\$0.00
\$158,208.00 2011					
MetroWest Legal Services, Inc. 63 Fountain Street, Suite 304 Framingham, MA 01702 <i>KidsCare Connection</i>	509a(1)	\$0.00	\$89,551.55	\$44,775.77	\$44,775.78
\$89,551.55 2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Foundations of Health & Fitness</i> \$173,500.00 2009	Other	\$28,916.65	\$0.00	\$28,916.65	\$0.00
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Improving Schools From Within</i> <i>Developing Leadership to Stop Bullying</i>	Other	\$14,250.00	\$0.00	\$14,250.00	\$0.00
\$28,500.00 2011					
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>BOKS (Best of Kids in School), formerly</i> <i>known as Fit Kidz Get Up & Go, Inc.</i> \$105,031.00 2011	Other	\$87,525.83	\$0.00	\$17,505.17	\$70,020.66
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Improving Schools From Within</i> <i>Developing Student Peer Leadership to</i> <i>Stop Bullying</i> \$31,000.00 2012	Other	\$0.00	\$31,000.00	\$23,250.00	\$7,750.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Natick Public Schools 13 E. Central Street Natick, MA 01760 <i>Transitions Program</i> \$75,000.00 2012	Other	\$0.00	\$75,000.00	\$75,000.00	\$0.00
Town of Natick 179 Boden Lane Natick, MA 01760 <i>Natick Community Senior Center Health and Exercise Equipment</i> \$84,698.00 2012	Other	\$0.00	\$84,698.00	\$84,698.00	\$0.00
Town of Natick 179 Boden Lane Natick, MA 01760 <i>Natick Community Senior Center Exercise Continuation Grant</i> \$25,180.00 2012	Other	\$0.00	\$25,180.00	\$12,590.00	\$12,590.00
Natick Service Council, Inc. 2 Webster Street Natick, MA 01760 <i>The Living Well Project: Behavioral Health Screening & Intervention for Older Adults</i> \$25,000.00 2012	501c(3)	\$0.00	\$25,000.00	\$25,000.00	\$0.00
Natick Visiting Nurse Association 209 W Central St, Suite 313 Natick, MA 01760 <i>MetroWest Meds</i> \$279,484.00 2012	501c(3)	\$0.00	\$279,484.00	\$279,484.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
National Alliance On Mental Illness Of Massachusetts 400 West Cummings Park Suite 6650 Woburn, MA 01801 <i>Mental Health and the Criminal Justice System Preventing Unnecessary Arrests and Incarceration</i> \$20,000.00 2012	501(c)(3)	\$0 00	\$20,000 00	\$10,000.00	\$10,000.00
Needham Public Schools 1330 Highland Avenue Needham, MA 02492 <i>Bullying Prevention Among Middle School Students</i> \$59,500.00 2011	Other	\$39,666.68	\$0 00	\$9,916.66	\$29,750.02
New England Eye Institute 940 Commonwealth Avenue Boston, MA 02115 <i>MetroWest Community Health Care Foundation Eye Fund</i> \$7,900 00 2010	501(c)(3)	\$3,950.00	\$0.00	\$3,950.00	\$0.00
New England Eye Institute 940 Commonwealth Avenue Boston, MA 02115 <i>The Framingham Public School Vision Center Eyeglass Fund</i> \$6,000.00 2012	501(c)(3)	\$0 00	\$6,000.00	\$0.00	\$6,000 00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Michelle Salvato 442 Old Connecticut Path, Apt. 5 Framingham, MA 01701 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Tran Finneran 1325 Worcester Road, B5 Framingham, MA 01701 \$699.00 2012		\$0.00	\$699.00	\$699.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Susan Cavallaro 95 Mill Street Hopdale, MA 01747 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Nicole Alger 18 Gleason Street Ext Marlborough, MA 01752 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Michelle Garcia</i> 87 Stacey Road Marlborough, MA 01752 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Lucretia McFadden</i> 169 Cedar Street Milford, MA 01757 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Leydy Marin</i> 21 Warner Street Hudson, MA 01749 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Julie Colantuoni</i> 3 Central Street, Apt. 1 Westborough, MA 01581 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Jessica Firmingham 273 Boston Post Road E #2 Marlborough, MA 01752 \$2,000.00 2012		\$0 00	\$2,000 00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Angela Trombley 34 Winter Street Northborough, MA 01532 \$1,000 00 2012		\$0 00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Alcileia Foster 259 Boston Post Road, Apt #6 Marlborough, MA 01752 \$2,000 00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Pamela Lusek 4 Rev. Thomas Hooker Road Westborough, MA 01581 \$2,000.00 2012		\$0.00	\$2,000 00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jensen McKee</i> <i>30 Lafayette Lane</i> <i>Norfolk, MA 02056</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Althea Swett</i> <i>359 Village Street, Unit 3</i> <i>Mills, MA 02054</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Bianca Cutler</i> <i>42 Everett Street</i> <i>Sherborn, MA 01770</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Brisa Consoletti</i> <i>64 Nason Street</i> <i>Bellingham, MA 02019</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Camila DaMatta Venades 140 Chapin Road Hudson, MA 01749 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Candace Lally 281 Hudson Street Marlborough, MA 01752 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Erica Bonilla 55 Elbow Street Bellingham, MA 02019 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Kristina Ellmore 23 Glines Ave Milford, MA 01757 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient Address Purpose	2012	2012	2012	2012	2012
Beginning Balance	Newly Allocated	Amount Paid	Ending Balance		
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Shannon Gusmini 11 Second Street Natick, MA 01760 \$2,000.00 2012	\$0.00	\$2,000.00	\$0.00	\$0.00	
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Nicholas Larkin 73 School Street Needham, MA 02492 \$2,000.00 2012	\$0.00	\$2,000.00	\$0.00	\$0.00	
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Vicki Ferretti 12 Temi Rd Hudson, MA 01749 \$1,000.00 2012	\$0.00	\$1,000.00	\$0.00	\$0.00	
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Nancy Hopkins 9 Pollock Rd Wayland, MA 01778 \$1,000.00 2012	\$0.00	\$1,000.00	\$0.00	\$0.00	

Fiscal Year 2012

Recipient and Purpose	2012	2012	2012	2012	2012
	Beginning Balance	Newly Allocated	Amount Paid	Ending Balance	
Nursing Scholarships	\$0.00	\$2,000.00	\$2,000.00	\$0.00	
161 Worcester Road					
Framingham, MA 01701					
Nathaniel Eng					
6 Arbor Way					
Framingham, MA 01701					
\$2,000.00					
2012					
Nursing Scholarships	\$0.00	\$2,000.00	\$2,000.00	\$0.00	
161 Worcester Road					
Framingham, MA 01701					
Monika Horava					
84 Oakland Street					
Medway, MA 02053					
\$2,000.00					
2012					
Nursing Scholarships	\$0.00	\$2,000.00	\$2,000.00	\$0.00	
161 Worcester Road					
Framingham, MA 01701					
Nicole Cioffi					
221 Farm Street					
Milis MA, 02054					
\$2,000.00					
2012					
Nursing Scholarships	\$0.00	\$1,000.00	\$1,000.00	\$0.00	
161 Worcester Road					
Framingham, MA 01701					
Nicole Johnson					
127 Highland Street					
Milford, MA 01757					
\$1,000.00					
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Nicole Keenan</i> <i>10 Hutchinson Drive</i> <i>Marlborough, MA 01752</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Rachel Frank</i> <i>62 Donna Rd</i> <i>Framingham, MA 01701</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Taryn Phaneuf</i> <i>29 Oak Ridge Lane</i> <i>Ashland, MA 01721</i> \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Julia Silverman</i> <i>1 Sherborne Circle</i> <i>Ashland, MA 01721</i> \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Frankie Leigh Mueller 71 South Street Northborough MA 01532 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Nina Coppola 27 Centre Street Dover, MA 02030 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Alexandra R Webb 4 Richardson Court Westborough, MA 01581 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Jessica Ferreira 15 Courtland Street Milford, MA 01757 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Jennifer MacGregor 7 Forest Ave Natick, MA 01760 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Jennifer Lannigan 22 Essex Street Norfolk, MA 02056 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Jennifer Boothby 28 Brogden Rd Ashland, MA 01721 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Emily Lewis 8 Columbia Ave Natick, MA 01760 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Emily Kofi-Fleyn 44 Forest Avenue Extension Natick, MA 01760 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Carina Filosa 23 Woodridge Road Milford, MA 01757 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Caitlin Bourke 13 Hunnewell Terrace Needham, MA 02494 \$1,000.00 2012		\$0.00	\$1,000.00	\$1,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 Brianna Day 33 Ranger Road Natick, MA 01760 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Ashley E Shorton</i> 89 Bethany Rd. Apt 203 Framingham, MA 01702 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Alyssa M Magri</i> 11A Raymond Marchetti St Ashland, MA 01721 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Alexis Cuminsky- Keohan</i> 21 Apsley Street #3 Hudson, MA 01749 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Judith Allen</i> 55 East Central Street #2 Natick, MA 01760 \$2,000.00 2012		\$0.00	\$2,000.00	\$2,000.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Nursing Scholarships 161 Worcester Road Framingham, MA 01701 <i>Jennifer Castelli</i> 57 Conant Rd Framingham, MA 01702 \$2,000.00		\$0.00	\$2,000.00	\$2,000.00	\$0.00
2012					
Olin College of Engineering Olin College 1000 Olin Way Needham, MA 02492 <i>Engineering for Humanity Helping Elders Age in Place through Partnerships for Healthy Living</i> \$60,000.00		\$40,000.00	\$0.00	\$20,000.00	\$20,000.00
2011					
Pelham Apts. Recreation and Computer Networks Center 75 Second Street Framingham, MA 01702 <i>Cuide</i> \$5,000.00		\$0.00	\$5,000.00	\$5,000.00	\$0.00
2012					
Planned Parenthood League of Massachusetts 1055 Commonwealth Ave. Boston, MA 02215 <i>Keeping Kids Healthy' Comprehensive Outreach and Sex Education for Young People and Parents</i> \$56,673.00		\$0.00	\$56,673.00	\$28,336.50	\$28,336.50
2012					

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Reach Beyond Domestic Violence Inc PO Box 540024 Waltham, MA 02454 <i>Peers Against Violence (PAVE)</i> \$39,762.29 2012	501(c)(3)	\$0.00	\$33,619.13	\$19,881.15	\$19,881.15
Share Our Strength, Inc. 110 W. Squantum Street, Suite 27 Quincy, MA 02171 <i>Cooking Matters Massachusetts in the MetroWest</i> \$60,000.00 2012	Non-profit organization	\$0.00	\$60,000.00	\$30,000.00	\$30,000.00
South Middlesex Opportunity Council, Inc. 300 Howard Street Framingham, MA 01702 <i>SMOC Behavioral Health Nurse Care Coordinator</i> \$50,000.00 2012	501(c)(3)	\$0.00	\$50,000.00	\$50,000.00	\$0.00
Springwell, Inc. 307 Waverley Oaks Road, Suite 205 Waltham, MA 02452 <i>Elder Care Transitions Intervention Program</i> \$16,000.00 2011	Non-profit organization	\$12,000.00	\$0.00	\$12,000.00	\$0.00
Sudbury Valley Trustees 18 Wolbach Road Sudbury, MA 01776 <i>South Framingham Community Garden Initiative</i> \$13,443.11 2011	501(c)(3)	\$0.00	\$0.00	-\$2,215.89	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance 2012	Newly Allocated 2012	Amount Paid 2012	Ending Balance 2012
Town of Natick 13 East Central Street Natick, MA 01760 <i>Safe Steps</i> \$65,000.00 2011	Municipality of Government	\$32,500.00	\$0.00	\$0.00	\$32,500.00
Town of Northborough 63 Main Street Northborough, MA 01532 <i>Building a Healthy Northborough - Year two implementation phase</i> \$59,077.00 2011	Municipality of Government	\$29,538.50	\$0.00	\$29,538.50	\$0.00
Trustees of Boston University 715 Albany Street, M-921 Boston, MA 02118 <i>Improving Family Communication to Reduce Obesity Among Children in Framingham, MA</i> \$149,974.93 2006	501c(3)	\$0.00	\$0.00	-\$25.07	\$0.00
Trustees of Boston University 715 Albany Street, M-921 Boston, MA 02118 <i>SEAL Framingham</i> \$67,862.70 2011	501c(3)	\$33,931.35	\$0.00	\$33,931.35	\$0.00
WalkBoston 45 School Street Boston, MA 02108 <i>Setting the Stage for Increasing Walking in Franklin, Milford and Northborough</i> \$42,544.00 2011	501c(3)	\$21,272.00	\$0.00	\$21,272.00	\$0.00

Fiscal Year 2012

Recipient and/or Purpose	Tax Status	Beginning Balance	Newly Allocated	Amount Paid	Ending Balance
		2012	2012	2012	2012
Wayside Youth & Family Support Network, Inc.	509a(1)	\$0.00	\$28,584.00	\$14,292.00	\$14,292.00
1 Fiederrick Abbott Way Framingham, MA 01701 Tempo Young Adult Resource Center Improving the Health Status of Vulnerable Young Adults					
2012					
Grand Totals (133 Items)		\$1,512,384.29	\$1,868,521.68	\$2,079,212.82	\$1,301,693.16