

#### FROM OUR BOARD CHAIRMAN AND PRESIDENT AND CEO

aul Hawken once said, "no one thing can change by itself." Everything is connected. In every community, housing, healthcare, education, employment, the environment, and the economy are intricately linked. If you want to improve one area, you must improve all areas. This is why we are heavily invested in understanding the needs and resources of the greater community.



The same connectivity is true for nonprofit organizations, the small but mighty force charged

with tackling many of our greatest challenges. While they need strong programs, they also need solid, sustainable infrastructures. While they need effective and empowered leadership, they also need strategic partnerships and networks. The strength of one area determines the strength of the other areas. A chain is only as strong as its weakest link. This is why we are heavily invested in understanding the needs and resources of the nonprofit community.

Everything is connected. No one thing can change by itself. For the past 29 years, we have been able to drive social change—strategically, purposefully, and continuously—by recognizing this connectivity, fostering partnerships and collaborations that transcend silos, and strategically deploying our resources to create a powerful chain

# "ALL IS CONNECTED... NO ONE THING CAN CHANGE BY ITSELF." – PAUL HAWKEN

reaction. This is what has fueled our growth and increased our individual and collective impact in the community.

And, while it's important to focus on "numbers" and the strategies

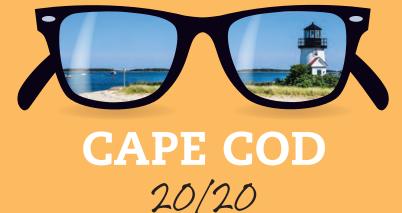
behind them in an Annual Report, we must also recognize and celebrate the people who have helped us connect the dots. Thank you for your support and a successful year. We're proud of what we achieved in 2018. Together.

With gratitude,

Sharon Nunes

Sharon Nunes Board Chairman

Kristin O'Malley President and CEO



## A New Vision For Our Community

The Foundation launched this initiative in 2017 to strategically impact two areas: Nonprofit Capacity-Building and Youth Development. After careful research, we determined this is where the needs are the greatest in our community, but the resources are not as strong as they could be – or need to be. In 2018, we directed a substantial unrestricted endowment gift we received to this initiative and invited several community influencers to join a local collaborative to raise \$1 million by 2020. To date, we have raised \$400,000.

#### 2018 Initiatives

#### NONPROFIT ORGANIZATIONAL CAPACITY-BUILDING STRATEGIC FOCUS GRANTS

We awarded grants totaling \$62,000 to nine nonprofit organizations for capacitybuilding projects: adding key personnel, hiring consultants, purchasing and upgrading technology, and strengthening existing programs. The recipients were: Association to Preserve Cape Cod; Calmer Choice; Cape Abilities; Community Connections; Latham Centers; Community Health Center of Cape Cod; Cultural Center of Cape Cod; Housing Assistance Corporation; and WE CAN.

#### **CAPE HOUSING PARTNERSHIP**

We invested an additional \$20,000 in this Cape-wide initiative to educate the

public about the need for affordable housing, bringing our total investment over a two-year period to \$40,000.

#### NONPROFIT LEADERSHIP DEVELOPMENT

In May, 16 nonprofit executives graduated from the Institute for Nonprofit Practice's Leadership Development Program on Cape Cod. In September, we launched the third year of this award-winning program with our local funders' collaborative, giving 22 more nonprofit executives, including nine students from Martha's Vineyard, this valuable opportunity.

In addition, we organized and led two sessions on Board Training at Philanthropy Day, an annual event to celebrate the nonprofit work in the community, facilitate networking, and provide development opportunities for participants. The event is sponsored by Philanthropy Partners of the Cape and Islands.

We also continued to lead the Cape and Islands Partnership for Nonprofit Advancement, a 23-member collaborative of funders and program providers, strengthening local educational opportunities for nonprofit professional development.

#### YOUTH DEVELOPMENT

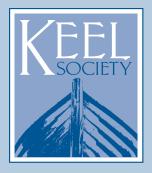
We awarded a multi-year grant of \$150,000 to support the expansion of Y-Achievers, a highly successful program of YMCA Cape Cod. This program, established at Barnstable High School in 2015, matches young people with powerful mentors who help them explore careers, prepare for higher education and complete college. The program expanded to Dennis-Yarmouth Regional High School in 2018. Continued expansion is planned.

#### 2020 Strategic Leadership Visionaries

Anonymous

Mr. and Mrs. Ramani Ayer Ms. Wendy Baker and Mr. Bob Minetti Mr. and Mrs. D. Scott Brown Mr. and Mrs. Jacob F. Brown. II Mr. and Mrs. Edward Budd Larry Capodilupo Henry and Elizabeth Holden Hilton and Georgia Jervey Jerome and Joan D. Karter Ron and Sharon Nunes Mr. and Mrs. James M. Pagos Mark and Elaine Ouinn Mr. and Mrs. Jack Roessner Sid and Donna Snow Brooks S. Thayer Mr. and Mrs. Larry Thayer Mr. and Mrs. William Trachsel

> Learn More! Please contact us to learn more about this initiative and how you can become involved.



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**KEEL SOCIETY** 

The Keel Society honors the Foundation's planned giving leadership group. If you have made a provision for the Foundation in your will or trust, please let us know so that we may express our gratitude and include you in the society.

Elizabeth Gawron

Mr. Dave Harrigan

Dr. and Mrs. Sanford

Janice Hank

James Hinkle

Lois Hirshberg

Hochman

Jari Rapaport Caroline I. Reed Tim and Andrea Reed James H. Rice\* Alix Ritchie John M. Sargent Jacquelyn B. Signore William C. Snow Mr. and Mrs. Lawrence O. Spaulding, Jr. Ms. Gail Turner and Mr. Peter Spier William Stubler Zelda Suslak **Brooks S. Thayer** Mr. and Mrs. Larry Thayer Bessie M. Tirrell\* James and Janice Vaccaro Sarah L. Walker Mr. and Mrs. Stephen Wallace Mrs. Suzanne Dyer Wise \* Indicates a Keel Society member

who died in 2018

Bold indicates a new Keel Society member for 2018

\$**2,707,428** 

**Total Grants Awarded to Nonprofit Organizations** 

# . . . . . . . . . . . . . \$2,674,725 **TOTAL GIFTS TO** FOUNDATION FUNDS

\$150,000 **Awarded Our First** Multi-Year Grant to

- Y-Achievers Program of YMCA Cape Cod
- \$500,000 In Scholarships Awarded to 140 Local Students

# **PROMOTED**

**DARA GANNON Director of Programs** and Donor Services

**CARRIF BFARSF Program Officer** 

**New Foundation Funds Established** 

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Nonprofit Leaders Graduated from the Institute for Nonprofit **Practice's Leadership Development Program** 

**4** | THE CAPE COD FOUNDATION

Susan E. Flaws



The unrestricted gifts from our Community Partners support the Foundation's important community work and civic leadership initiatives. The Foundation recognizes and thanks the following 2018 Community Partners for their continued support and generosity.

#### COMMUNITY BUILDER \$5.000+

Clifford Fund Jordan L. Shapiro Charitable Trust The Wood Lumber Company

#### VISIONARY

#### \$2,500-\$4,999

Bilezikian Family Foundation Mr. and Mrs. Jacob F. Brown, II Jan\* and Larry Capodilupo Walter G. and Barbara M. Korntheuer La Tanzi, Spaulding & Landreth, PC Mr. and Mrs. Richard T. Oliver Mr. and Mrs. John Todd Rosemary and Victor von Schlegell Fund

#### BENEFACTOR

#### \$1,000-\$2,499

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William and Anne Snow Designated Fund Mr. and Mrs. Lawrence O. Spaulding, Jr.

# **PILLAR** \$500-\$999

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#### **STALWART**

#### \$250-\$499 Anonymous

Jeffrey and Nancy Bilezikian Chuck and Francie Cramb Mr. and Mrs. Harold L. Gilmore Trenor F. Goodell Fund Mr. Paul Houlihan and Ms. Vianna Heath William R. Leitch Kristin O'Malley David and Gail Oppenheim Lisa F. Sherman, Esq. Joan M. Shostak Andrew L. Singer, Esq. Mr. and Mrs. Robert W. Snow Brooks S. Thayer

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#### \$100-\$249

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# THE ULTIMATE



# 

## 100% LOCAL. 100% TAX DEDUCTIBLE. 100% WORTH IT.

Our Annual Non-Event is the Ultimate Un-Party. Unconventional. Unpretentious. Uncomplicated. Seriously, it's unlike any party you'll ever attend because it doesn't really exist. However, it's not unnecessary or unimportant. This unorthodox event helps us raise unrestricted funds to support our work in the community.

Last year, more than 300 people RSVP'd with regrets, but purchased tickets and tables to support the Foundation's civic leadership initiatives and power up resources and opportunities for local nonprofit organizations. By all accounts, everyone had an unforgettable time, and we're ever-so grateful for their unwavering support. Our sponsors also deserve a very special round of applause.

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\* Indicates a donor who died in 2018

# GRANTEES

In 2018, The Cape Cod Foundation awarded 564 grants in the following categories for a total of \$2,707,428 to community organizations.

#### ARTS & CULTURE \$329,393

The Academy of Performing Arts Arts Foundation of Cape Cod Boch Center Boston Symphony Orchestra Bourne Historical Society Cahoon Museum of American Art Cape Cod Art Association Cape Cod Center for the Arts Cape Cod Chamber Music Festival Cape Cod Chamber Orchestra Cape Cod Maritime Museum Cape Cod Museum of Art Cape Cod Theatre Company/Harwich Jr. Theatre

Cape Symphony & Conservatory Chatham Marconi Maritime Center College Light Opera Company Cotuit Center for the Arts Creative Arts Center Cultural Center of Cape Cod Eventide Arts Falmouth Band Parents Falmouth Chamber Players Orchestra Falmouth Chorale Falmouth Historical Society and Museums on the Green Falmouth Theatre Guild French Cable Station Museum in Orleans Friends of Nobska Light

COMMUNITY DEVELOPMENT \$148,430

All Hands and Hearts Smart Response Armenian Assembly of America Barnstable Police Association Cape Cod Pride Cape Cod Regional Law Enforcement Council Cape Cod Young Professionals Coast Guard Foundation COMM Firefighters Association Community Development Partnership Entrepreneurship for All Falmouth Together We Can Friends of Boca Grande Community Center Friends of the 4th of July Friends of the 4th of July Friends of the New Falmouth Senior Center Greater Washington Community Foundation Orleans Fire Department Orleans Police Relief Association Town of Barnstable Town of Eastham Fire & Rescue Department Town of Orleans Woods Hole Community Association Yarmouth Firefighters and Relief Association Yarmouth Police Foundation Yarmouth Police Relief Association

Friends of the Sandwich

Heritage Museums and

Highfield Hall & Gardens

John F. Kennedy Hyannis

Museum Foundation

Morris-Jumel Mansion

New Bedford Symphony

**Orleans Historical Society** 

Osterville Historical Society

Sandwich Elementary PTA

Woods Hole Film Festival

Woods Hole Public Library

Town Archives

Orchestra

Gardens

The Key Idea

Orchestra

Riverside Theatre

WOMR Radio

The Yard

Sandwich Arts Alliance

Hartford Symphony

#### **EDUCATION \$368,545**

Barnstable Education Foundation Barnstable High School Barnstable Public Schools Boston College Office of University Advancement Boston University Brown University Cape Cod Academy Cape Cod Child Development Program Cape Cod Collaborative Cape Cod Community College Educational Foundation Cape Cod Literacy Council Cape Cod Regional Technical High School Chabad at Columbia University Colaate University Dan Hassett Memorial Scholarship Fund Dartmouth College Dennis-Yarmouth Regional School District East Falmouth Elementary Parent Teacher Organization Facing History and Ourselves

Falmouth Academy Falmouth Public Schools Falmouth STEM Boosters Foundation for Family Education Friends of The Eldredge Public Library The Frontier Fund of Columbia University. Dept. of Psychiatry Harvard University Medical School Helene Fuld College of Nursing Institute for Nonprofit Practice Jr. Tech Learning Spring School Massachusetts Boys State Foundation Massachusetts Girls State Foundation Massachusetts Institute of Technology MIT Alumni Fund Monomoy Regional High School Mount Holyoke College Nauset Regional Middle School

New England Center for Arts & Technology North Falmouth Elementary School Okeechobee Educational Foundation Our Bodies Ourselves Sea Lab Marine Science Education – New Bedford Public Schools Smith College Snow Library St. Paul's School Sturgis Library United States Merchant Marine Academy Alumni Foundation Weill Cornell Medical College West Falmouth Library WGBH Educational Foundation Wheaton College Williams College Woods Hole Public Library Worcester Academy Yarmouth Library Association

#### ENVIRONMENT & ANIMAL-RELATED \$290,360

The 300 Committee Land Trust Animal Rescue League of Boston Association to Preserve Cape Cod Buddy Dog Humane Society Buzzards Bay Coalition Cape Cod Commercial Fishermen's Alliance Cape Cod Museum of Natural History Cape Wildlife Center Center for Coastal Studies Center for Responsible Travel Chatham Conservation Foundation Cold Noses Foundation The Compact of Cape Cod Conservation Trusts Defenders of Wildlife

Dennis Conservation Trust Friends of Chatham Waterways Friends of Falmouth Dogs Friends of Pleasant Bay Gasparilla Island Conservation and Improvement Association Harwich Conservation Trust International Fund for Animal Welfare Long Pasture Wildlife Sanctuary Main Line Animal Rescue Marine Biological Laboratory Mass Audubon Society/ Wellfleet Bay Wildlife Sanctuary Massachusetts Society for the Prevention of Cruelty to Animals

Nantucket Safe Harbor for Animals National Marine Life Center New England Society for Abandoned Animals Ocean Arks International Orleans Conservation Trust People for Cats Salt Pond Areas Bird Sanctuaries Sampson Fund for Veterinary Care Sea Call Farm Supporters Second Chance Animal Rescue (SCAR) Sierra Club Foundation **Tall Timbers Foundation** Wild Care Woods Hole Research Center World Wildlife Fund

#### GRANTEES

#### HEALTH \$603,195

Adler Aphasia Center Alzheimer's Family Caregiver Support Center American Heart Association Americares Foundation Behavioral Health Innovators Boca Grande Health Clinic Foundation Briaham and Women's Hospital BrightFocus Foundation The Broad Institute Cape Cod Healthcare Cape Cod Healthcare Foundation Cape Cod Hospital Auxiliary, Orleans Branch

Cape Wellness Collaborative Community Health Center of Cape Cod Compassionate Care ALS Creutzfeldt-Jakob Disease Foundation Doctors Without Borders USA **Duffy Health Center** Fairwinds Center Friends of Fairwinds The Arnold P. Gold Foundation Gosnold on Cape Cod The Ryan Harvey Foundation The Hastings Center The Herren Project

#### Home Base

HopeHealth Massachusetts March of Dimes Foundation Outer Cape Health Services Patriot Rovers Samaritans on Cape Cod & the Islands Shriners Hospitals for Children-Boston South Shore Mental Health St. Jude Childrens Research Hospital Visiting Nurse Association of Cape Cod Wellstrong Yoga Neighborhood



#### **RECREATION & YOUTH DEVELOPMENT \$311,150**

Amazing Grace of Cape Cod Atlantic Challenge Foundation Barnstable Youth Hockey Association Big Brothers/Big Sisters of Cape Cod & the Islands Boys & Girls Club of Brockton Boys & Girls Club of Greater New Bedford Boys and Girls Club of Cape Cod Buzzards Bav Power Sauadron Cape Cod & Islands Boy Scout Council Cape Cod Challenger Club Cape Cod Children's Place Cape Cod Super Sluggers

Carlisle Charitable Foundation Chewonki Foundation Community Boating Center Corporal Nicholas G. Xiarhos Young Marines DC Dream Center Dream Day on Cape Cod Falmouth Volunteers In Public Schools George and Raymond Frank Foundation Girl Scouts of Eastern Massachusetts Hyannis Supporting Our Youth Inclusive Cycling International Katelvnn's Closet Monomov Community Services

Namequoit Sailing Association Nauset Warriors Booster Club Pleasant Bay Community Boatina Robert F. Kennedy Children's Action Corps Sailing Heals Shea's Youth Basketball Association SocialGood Special Olympics Massachusetts Town of Yarmouth Parks & Recreation Department Washington Association YMCA Cape Cod YWCA Southeastern Massachusetts

#### **RELIGION/FAITH-BASED \$85,530**

Boca Grande United Methodist Church Brewster Baptist Church Cape Cod Covenant Church Church of the Nazarene Congregational Church of New Canaan Federated Church of Orleans First Parish Brewster Unitarian Universalist Church Hill Havurah Holy Trinity Church Orleans United Methodist Church Saint Ann's Shrine St. Christopher's Episcopal Church St. David's Episcopal Church St. Joan of Arc Church Unitarian Church of Barnstable

#### HOUSING & SHELTER \$223,900

Belonging to Each Other CHAMP Homes Falmouth Housing Trust Friends or Relatives with Autism and Related Disabilities Habitat for Humanity International Habitat for Humanity of Cape Cod Harwich Ecumenical Council for the Homeless Homeless Prevention Council Housing Assistance Corporation

#### HUMAN SERVICES \$346,925

#### 826 Boston African Education Program American Leaion Post #308 American Red Cross Arredondo Family Foundation Audible Local Ledger Calmer Choice Cape & Islands Veterans Outreach Center Cape Abilities Cape and Islands United Way Cape Cod Council of Churches Cape Cod Military Support Foundation Cape Cod Times Needy Fund Catholic Social Services

**Chester County Food Bank** Child & Family Services Community Connections **Educated Canines Assisting** with Disabilities Emerald Hollow Therapeutic Riding Center Falmouth Service Center Family Pantry of Cape Cod Fisher House Boston Food for the Poor Freedom Alliance Helpina Our Women Independence House Jarheads Motorcycle Club of Cape Cod Kennedy Donovan Center Latham Centers Lower Cape Outreach Council

Marine Corps League Detachment 125 Marine Toys for Tots Foundation Neighborhood Falmouth Orleans Council on Aging Planned Parenthood League of MA Salvation Army Sandwich Council on Aging Seabury Charitable Foundation Sierra Delta St. Vincent de Paul Society U.S. Fund for UNICEF United Service Organization WE CAN Corporation Women's Lunch Place Yarmouth Food Pantry



In 2018, The Cape Cod Foundation awarded over \$500,000 to more than 140 worthy students from Cape Cod and the Islands.

#### Adair/Collins Science & Engineering Scholarship of Barnstable American Legion Post 206

Molly Autery, Barnstable

#### Advocates for a Community College Education Scholarship

Mary Gastonguay, Dennis Natalie Guthrie, Falmouth Hallie Hope, Barnstable Mackenzie Knight, Barnstable Joseph Lyons, Falmouth Rachel McEnroe, Mashpee Jhteneck Duran Rodriguez, Yarmouth Dorothy Rose, Chatham Danielle Shanahan, Yarmouth Carraia Weatherup, Eastham

American Association of University Women/Cape Cod Branch Student Re-Entry Scholarship Chelsea Crowley, Sandwich

American Legion Post 308, Orleans, MA Veterans Scholarship Helen Gainey, Brewster Rae Gainey, Brewster James McCully, Eastham Eli Seiser, Eastham

Barnstable High School Class of 2009 Dean Boger Memorial Scholarship Rayzel Joseph, Barnstable

Stephen Bernard Memorial Scholarship Francesca Barr, Chatham Elle Horton, Barnstable Abigail Wright, Chatham

**Sean Breen Memorial Scholarship** Mikayla Mathieu, Barnstable

Armand L. Bruneau, Jr. and Muriel B. Bruneau Memorial Scholarship

Miah Archambault, Yarmouth Madison Leonard, Dennis Emma Norcott, Harwich

**Patrick M. Butler Memorial Scholarship** Keeley Clancy, Yarmouth

Flannery Rogers, Falmouth

Dorothy W. and Charles M. Campbell Scholarship Brian Brooks, Brewster Madaket Nobili, Eastham Joshua Schofield, Brewster

#### Cape Cod Foundation Scholarship

Francesca Barr, Chatham Allison Carter, Barnstable Celia Krefter, Mashpee Nathan LeBrun, Falmouth Samantha Sierra, Bourne

Cape Cod Healthcare Nurse Continuing Education Fund Amy Patterson, Wellfleet

Cape Cod Hospitality Marketing Association Scholarship Eliza Hawthorne, Harwich Nathan LeBrun, Falmouth

**Cape Cod Restaurants, Inc. Scholarship** Nathan LeBrun, Falmouth **Cape Cod Women's** Association Scholarship Kelly Medeiros, Wellfleet Chanda Uy, Bourne

Cape Cod Young Professionals Career Connect Scholarship Kelly Medeiros, Wellfleet

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Patricia Colbert Donovan Memorial Scholarship Leanne Guimond, Barnstable Rayzel Joseph, Barnstable

**Bill Cotter Memorial Scholarship** Alyssa Martin, Barnstable

**Priscilla M. (Wittenmeyer) Cotter Memorial Scholarship** Larissa Delazari, Barnstable

William J. "Rusty" Cotter Memorial Scholarship Ryan Welsh, Barnstable

**Annie S. Crowell Scholarship** Gabriella Gray, Barnstable Mackenzie Knight, Barnstable

Daysie Day Scholarship Cody Doyle, Chatham Nicholas Russell, Chatham Rachel Smith, Chatham

**Samuel D'Olimpio Scholarship** Leanne Guimond, Barnstable Michael Turner, Barnstable

Logan Dunne Memorial Scholarship Mathiew Daniels-Diehl, Harwich Connor McLeod, Brewster Myles Pelligrini, Brewster Eli Seiser, Eastham

Jay Elliott Memorial Scholarship Carlton Miller-Cordova, Eastham Andrew Fayne Memorial Scholarship Laurel Fournier, Barnstable Laine Palmer, Barnstable

**Brig Gen (USAF ret) John F. Flanagan Scholarship** Gabrielle Carroll, Mashpee Casey Reed, Falmouth

Daniel Bradley Gaylord Memorial Scholarship Rania Souza, Bourne

Malcolm M. Gidley Memorial Scholarship James Sandison, Harwich

Melissa Gifford Memorial Scholarship Hannah Goyette, Barnstable

Eleanor Ruth Parsons Gleason Scholarship Anthony Atta-Harris, Harwich Michael Sanborn, Yarmouth

**Jean W. Gordon Scholarship** Caroline Donoghue, Wellfleet

**Roberta A. Guzzetta** Scholarship Fund John Our, Chatham

Harwich Class of '49 Scholarship Elizabeth Pandiscio, Harwich

Ernest Michael Helides and Evelyn Ponticos Helides Scholarship Keith Taylor, Brewster

**J. G. Hinkle Scholarship** Caroline Brodt. Barnstable

**Hyannis Normal School Alumni Scholarship** Felicia Blackwell, Dennis Lianna Mitchell, Barnstable

**Capt. Roger J. Jetté Memorial Scholarship** Tyler Wheeler, Nantucket

Philip "PJ" Jones Memorial Scholarship Hannah Govette, Barnstable

**Ketchum-Luft Scholarship** Ethan Craven, Wellfleet **Peter Kirwin Memorial Scholarship** Lisa Terry, Barnstable

**Richard & Ethel Koff Memorial Scholarship** Madison Lamothe, Barnstable

Live for Lou Athletes Scholarship Latoya Brown, Dennis Connor McLeod, Brewster

**Leo Lucas Memorial Scholarship** Emma Norcott, Harwich

**Kirk MacSwan Memorial Scholarship** Aaron Huynh, Barnstable

Roslyn Praise Margolin Scholarship Chet Powers, Barnstable Jessica Tavlor, Brewster

Stanley V. Margolin Scholarship Alexander Denmark, Sandwich

**Opera New England of Cape Cod Scholarship** Celia Krefter, Mashpee

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**Sandwich Legacy Scholarship** Anastasia Troyanas, Sandwich



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Caitlyn Coughlin, Dennis Sarah Tanner, Wellfleet Rodney Vaughan, Provincetown

David Fisk Scudder Scholarship Jack Johnson, Brewster

**Ruth B. Sears Scholarship** Anthony lachetta, Dennis Anna McGaffigan, Dennis Sarah McGaffigan, Dennis

#### Shostak Scholarship

Sydney Berkeley, Yarmouth Arthur Kopellas, Orleans

#### Kaitlin M. Silk Memorial Scholarship

Caroline DoNascimento, Barnstable Jamie Fitzgerald, Barnstable Emily Gualberto, Barnstable Mckenna Meagher, Barnstable

**Bonnie Skane Memorial Scholarship** Brianna Cheatham, Mashpee

H. H. Snow Family Scholarship Matthew LeDous, Barnstable Katarzyna Sapinska, Provincetown Winthrop T. Trenholm Memorial Scholarship Alexandra Buck, Sandwich Jordan Leighton, Sandwich

**Megan Tripp Memorial** Scholarship Helen Gainey, Brewster Hale Thomas, Falmouth

Meaghan Wiggin, Barnstable
Esther M. Wallace

# Scholarship

Larissa Delazari, Barnstable Raphael DeSouza, Barnstable Hannah Goyette, Barnstable Grace Haskell, Chatham Christo Keller, Barnstable Nellie Marshall-Torres, Barnstable Casey Reed, Falmouth Katherine Reiber, Sandwich Rachel Smith, Chatham Halley Steinmetz, Brewster

**Michael B. Wallace Memorial Scholarship** Ryan Welsh, Barnstable

Patricia A. Ward Memorial Nauset Nursing/Medical Scholarship Lilly Keith, Dennis

**Bev Watters Memorial Scholarship** Samantha Lydon, Barnstable Frank X. and Mary E. Weny Scholarship Lilly Keith, Dennis

Henry and Minnie Whittemore Scholarship Brian Brooks, Brewster Jack Johnson, Brewster Connor McLeod, Brewster

David Willard Cape Cod Technology Council STEM Scholarship

Caleb Sonnabend, Barnstable Taylor Walsh, Brewster

Joseph F. Woodson Scholarship Sarah Dionisio, Barnstable Thomas Graham. Harwich

**World Concern Scholarship** Emma Fillion, Provincetown

**YES! Art Scholarship** Andrew Mitchell, Orleans

June A. Zenke Memorial

Scholarship Mathiew Daniels-Diehl, Harwich Emma Fillion, Provincetown Katarzyna Sapinska, Provincetown Sabina Yushkevich, Harwich



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# CAPE COD ASSOCIATION SCHOLARSHIP AWARD RECIPIENTS

Over 150 years ago, a group of successful gentlemen with a passion for Cape Cod came together to offer tuition reimbursement to Cape Cod residents. Today, the Cape Cod Association, one of the oldest and largest independent scholarship funds in New England, continues to recognize and assist deserving young men and women in furthering their education. In 2018, it awarded \$442,750 in scholarships to 297 students from Cape Cod & the Islands.

#### **CAPE COD ASSOCIATION**

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For 29 years, The Cape Cod Foundation has partnered with generous, community-minded individuals, families, businesses, and organizations to achieve their charitable goals by establishing

named funds. The funds, totaling over 300 at the end of 2018, produce income for grants that were distributed back into the community. The Foundation also manages charitable annuity and trust funds that provide income to the donor and other beneficiaries and support future discretionary or designated programs.

#### **DISCRETIONARY FUNDS**

**Discretionary Funds support** community needs as approved by the Foundation's Board of Directors. Aid to the Homeless (1990) Harry and Barbara Angus Grantmaking Fund (2013) Breast Cancer Reconstructive Surgery Fund (2014)Dorothy F. and George W. Cahoon, Jr. Fund (2001) Worthington Campbell, Jr. Fund (2013) CCF Fund for the Arts (2010) Cape Cod Healthcare Nurse Continuing Education Fund (2017) CCYP Giving Circle Fund (2015) Chatham Fund (2011) Community Fund (2010) Community Fund for Young People (1995) Priscilla M. Cotter Fund for Youth Activities (2001) Davenport Companies Fund (2016) The Euphemia Dobbie Memorial Fund (2001)

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Donor Advised Funds allow the donor to recommend grants.

The Akili Fund (2016) All Cape Piano Fund (2009) Robert and Alison Ament Donor-Advised Fund (2017) Ariel Alyssum Fund (2005) American Legion Post #308, Orleans, MA Veterans Fund (2008) Anthony Family Fund (2001) Arethusa Charitable Trust Fund (1999) Arts & Humanities Student Outreach Fund (1999) Beth and Todd Baker Fund (2007) Charles Bilezikian Memorial Fund (2016) The Briggs Fund (1998) Anne and Kenneth Brock Fund (2001) The Brown Family Fund (1999) Patrick M. Butler Charitable Fund (2009) Cape and Atlantic Challenge Fund I (2005) Cape and Atlantic Challenge Fund II (2008) Cape Cod Substance Abuse Prevention Fund (2013) Fund for Cape Elderly (1999) Cape Liberty Fund (2017) Cape Vintage Classic Fund (2018) Carol Fund (2003) Caron-Wood Cape Pros Foundation Fund (2008) Chai-Maginn Foundation Fund (2002) Clifford Fund (2010) David Bruce Cole Classical Music Fund (2002) Michael H. Cole Charitable Giving Fund (2013) Lou Colombo Music Fund (2012) Joseph F. Jr. and Louise L. Conlan Fund (2005) The Cooperative Bank of Cape Cod Fund (1994) James and Marianne Crowley Fund (1998) Corinne Cuda Fund (2007) Ellen and Richard Cuda Family Foundation Fund (2004) Fred and Eileen Cuda Fund (2007) James Holland Davis Fund (2001) Disability Achievement Fund (1998) Education Foundation for Dennis and Yarmouth, Inc. Fund (2000)

Fischbach Family Fund (2006) Sean M. Gannon Memorial Fund (2018) Great Expectations Fund (2001) Jean Hamilton Memorial Fund (2017) Trey Helliwell Memorial Fund (2001) Mollie Hirshberg Fund (2007) Kaplan Fund (2015) The Kingston Fund (2005) Lawrence-Lynch Corp. Foundation for Charitable Giving Fund (2015) League of Women Voters Civic Education Fund (2014) Live for Lou Fund (2014) Elizabeth Garner Martin Fund (2004) Donald C. McGraw Foundation Family Fund (2010) Mears Family Fund (2000) Namequoit Fund (2004) O'Keefe Family Charitable Fund (2011) Carolyn Van Vleck Pratt Fund for the Arts (1996) PSD Fund for Working Families (2018) ROAR Fund (2017) Rodriguez/Lynch Fund for Charitable Giving (2013) Rogers & Gray Insurance Agency Charitable Foundation Fund (2006) Rogers Family Fund (2005) Jacquelin W. Scarbrough Fund (2008) Florence G. Scott Charitable Fund (2010) Seaside LeMans Fund (2001) The Sheehan Family Foundation Fund (2010) Shepley Wide Open Fund (2017) Singer Family Charitable Fund (2012) Bonnie Skane Charitable Fund (2009) Lizzie Stimson Memorial Scholarship Fund for the Performing and Creative Arts (2014) Strokes for Stroke Fund (2014) Summersgill Family Fund (2013) TD Bank Fund (2000) TGC Fund (2010) Robert H. Taylor Foundation Fund (2017) Thaver Family Fund (2016) Rosemary and Victor von Schlegell Fund (1998) Willett Foundation Fund (1998) Suzanne Dyer Wise Development Fund (2016) Mary and Redwood Wright Fund (2005) Nicholas G. Xiarhos Memorial Foundation Fund (2017) Linda and William Zammer Foundation Fund (2002)

#### **DESIGNATED FUNDS**

Designated Funds support specific nonprofit organizations identified by the donor.

Allegretto Fund (2001) Harry and Barbara Angus Fund (2013) Permanent Fund for the Benefit of the Association for the Preservation of Cape Cod (2002) Fund for the Benefit of the Barnstable Education Foundation (2004) Fund for the Benefit of Jonathan Bourne Public Library (2008) Anne and Kenneth Brock Music Fund (2003) Robert D. and Shirlee G. Burd Animal Welfare Fund (2016) Cape & Islands Suicide Prevention Designated Fund (2011) Permanent Fund for the Benefit of Cape Cod Museum of Art (2008) Permanent Fund for the Benefit of the Cape Cod Museum of Natural History (1992) Fund for the Benefit of the Cape Cod Times Needy Fund in memory of Armand L. Bruneau, Jr. and Muriel B. Bruneau (2009) Fund for the Benefit of CCYP (2015) CCYP Endowment Fund (2015) Chatham Angel Fund (1997) Chatham Angel Revolving Loan Fund (1997) Child & Family Services of Cape Cod Fund (1997) Civic Leadership Fund (2002) Civic Leadership Endowment Fund (2013) Elizabeth C. and Moncrieff M. Cochran Memorial Trust Fund (1997) Robert Cooke Memorial Fund (2011) Ivor Cornman and Margaret E. Cornman Fund for the Benefit of the Woods Hole School (2012)Ivor Cornman and Margaret E. Cornman Fund (2000)Cotuit Foundation for the Arts Fund (2000) Kristen Elizabeth Davis Memorial Endowment Fund (2003)

Fund (2005) Fund for the Benefit of Disabled American Veterans of Falmouth Chapter 81 (2008) Dolphin Dash Fund (2017) Falmouth Public Library Fund (2010) Fund for the Benefit of Falmouth Public Library (2008)

Fund for the Benefit of Fisher College (2008)

Foundation for Family Education Fund (1997) Trenor F. Goodell Fund (2016) David A. Hall Memorial Open Space Legacy Fund (2002) Charlotte M. Hamill Fund (2015) Gordon T. Heald Fund (1999) HopeHealth Fund (1990) Permanent Fund for the Benefit of Independence House Endowment (2002) Kids & Teens Behavioral Health Assessment Center Fund (2006) Bud Klingenstein Scholarship and Award Fund (2012) Monomoy Regional Golf Program Fund (2017) Mary K. Morgan Fund (2005) Orleans United Methodist Church Fund (2005)Henry W. and Lucy B. Patterson Charitable Fund (2014) Provincetown Library Building Fund (2001) Provincetown Public Library Fund (2001) Robert B. Ryder Charitable Fund (2012) Sea Call Farm Supporters Fund (1990) William and Anne Snow Designated Fund (2006) Swift Family Fund (2007) Mark Edward Thayer Memorial Fund (2014) Toop Family Fund (2006) Robert Townsend and Ann Ryder Townsend Fund (2017) Thomas and Dorothy Travers Fund (2018) Truro Public Library Endowment Fund (1998) WE CAN Fund (2000) WHGANY Fund (2018) Charles A. Wintermeyer Charitable Lead Trust Fund (2008)

#### **AGENCY FUNDS**

Agency Funds are established by the agency for their benefit.

AIDS Support Group of Cape Cod Fund (2000)

Brewster Historical Society, Inc. Fund (2018) Camp Wingate \*Kirkland Alumni Fund (2008) Cape Abilities, Inc. Fund (1994) Cape Cod Center for the Arts Fund (2006)

Cape Cod Child Development Program Fund (1999)

Cape Cod Children's Place, Inc. Fund (2016) Cape Cod Council of Churches Fund (1991) Cape Symphony Orchestra Fund (1993)

CHAMP HOMES. Inc. Fund (2003) Chatham Rotary Foundation Fund (2008) Community Connections, Inc. Fund (1999) Elder Services of Cape Cod and the Islands, Inc. Fund (1998) Friends of Pleasant Bay Fund (1989) Housing Legacy Fund (Housing Assistance Corp.) (2018) The Kaplan/Eventide Arts Playwriting Prize Fund (2006) Lower Cape Ambulance Association, Inc. Fund (2015) Nauset Endowment Foundation Fund (2016) Virainia Nazro Parks Fund (2010) Robert Radtke Memorial Fund, Inc. Fund (2010)Jacob Sears Memorial Library Fund (1992) South Coastal Counties Legal Services, Inc. Fund (1993) South Yarmouth Library Association Funds (Crocker) (1998) South Yarmouth Library Association Funds (Crowell) (2000) South Yarmouth Library Association Funds (Siemen) (1998) SYLA General Fund (2018) West Yarmouth Library Association Endowment Fund (1999) Charlie Wilkerson Endowed Memorial Fund (Gosnold, Inc.) (2014)

#### FISCAL SPONSOR FUNDS

Behavioral Health Provider Coalition Fund (2014) Cape & Islands Suicide Prevention Coalition Fund (2009) Cape Cod PATH Fund (2017) Cape Cod Pet Collective Fund (2018) Community Health Network Area 27 Fiscal Sponsor Fund (2008) Falmouth Aquatics Fund (2012) Friends of Bass River Fund (2017) Healthy Aging Cape Cod (2018) Healthy Living Cape Cod Fund (2014) No Place for Hate Falmouth Fund (2015) Provincetown Fishermen's Memorial Fund (2014)



# **NEW FUNDS 2018**

In 2018, seventeen new funds were established through The Cape Cod Foundation.

Stephen Bernard Memorial Scholarship Fund

Brewster Historical Society, Inc. Fund

Cape Vintage Classic Fund

Cape Cod Pet Collective Fund

Sean M. Gannon Memorial Fund

Healthy Aging Cape Cod

Jack Harrison Memorial Scholarship Fund

The Harwich Fund

Housing Legacy Fund

The La Tanzi, Spaulding & Landreth Scholarship Fund

Dr. Andrew V. Mason and Edith B. Mason Memorial Fund

Joshua A. Nickerson Society Fund

Coach P Scholarship of Sportsmanship Fund

PSD Fund for Working Families

Ryan Family Amusements Scholarship Fund

SYLA General Fund

Thomas and Dorothy Travers Fund



The Town Funds of The Cape Cod Foundation are designed to support individual communities through grants to nonprofit organizations. In 2018, The Falmouth Fund (est. 2009) distributed \$100,000 in grants to nonprofits serving its residents. The Chatham Fund (est. 2011) distributed \$30,000; The Fund for Sandwich (est. 2015) distributed \$2,500. In its first year, The Harwich Fund (est. 2018) worked to build endowment resources. Community Philanthropists, those who have committed at least \$5,000 over five years, and others have donated to these funds to create a permanent endowment benefitting their communities now and for generations to come.

#### THE FALMOUTH FUND

#### 2019 Advisory Committee

Sharon Nunes, Chair Robert Ament Caroline McKee Anderson Tucker Clark Alan Goldstein Holly Harney Brian Keck Eric Loftus Vicky Lowell Olivia Masih White Eileen Miskell, Founding Chair

**Community Philanthropists** Anonymous (3) Mr. and Mrs. Robert H. Ament Mr. and Mrs. Greg Anderson Mr. and Mrs. Peter Annicelli Estate of Arthur Baker John and Helen Barnes Mrs. Leonard F. Beford Edgar and Julie Bristol Ms. Janet Buckingham Mrs. Barbara Burns Mr. and Mrs. Gerald W. Burritt Sally Casper and Gary Borisy Tucker M. Clark The Clifford Fund of The Cape Cod Foundation Molly N. Cornell Terry and Theresa Daly Mr. Bruce M. Davis Mr. and Mrs. Michael Distasi

Wilbur and Marcia Dyer Mr. Paul G. Farrell Mr. and Mrs. Lawrence S. Ferreira Ruth and Gerry Fischbach Family Fund of The Cape Cod Foundation **Fish Family Foundation** Dr. and Mrs. Michael Fishbein Salley H. Mavor and Robert G. Goldsborough Mr. and Mrs. Alan M. Goldstein Betsy Heald Eleanor Bronson Hodge Mr. Jack R. Howard Mr. and Mrs. Mark Hutker Leonard and Patricia Johnson

DeWitt\* and Megan Jones Mr. and Mrs. Brian L. Keck Ms. Heather K. Klimm Thomas R. Lebach Christopher and Kimberly LeBoeuf Russel Lemcke Margaret M. Lilly Dr. Mark and Marie Liska James and Caroline Lloyd Mr. and Mrs. Francis Lowell Ms. Mary McDonough Mr. and Mrs. Dennis McGillicuddy Ms. Amy Millisor Barbara Miner Estate of Betty J. Miskell Eileen and Dana Miskell Susan Morse Barrie W. Murray Kathleen H. Murray\* Mrs. Linda Nelson Ron and Sharon Nunes Mercedes Smith O'Connor Robert A. Ouimette Saul and Sally Pannell Mr. Robert H. Pelletreau, Jr. Plan It Network, Inc. Melinda M. Hall and Lawrence J. Pratt Mr. and Mrs. Benjamin L. Pring Jodee Bishop and James Reber Mr. and Mrs. John W. Rowe Eunice Hartman and Richard Shapiro Richard and Susan Smith Family Foundation John Swope Mr. and Mrs. John P. Sypek Mr. and Mrs. Noah Totten Mr. and Mrs. David C. Twichell Jr. Mr. and Mrs. Daniel H. Webb Craia and M. Patricia Wilder Willett Foundation Fund of The Cape Cod Foundation Mr. and Mrs. Milton E. Williamson The Wood Lumber Company Woods Hole Golf Club (Members of)

#### Supporters

Jeanne and Levi Adams Mr. and Mrs. John K. Allen Mr. and Mrs. Bruce H. Bumpus Cape Cod Five Cents Savinas Bank Joanna L. Christopher Doris and David Fausch Mr. and Mrs. Michael F. Harnev Mr. Doug Jones and Ms. Virginia Drachman Mr. Eric Loftus Maria H. Moniz Mr. and Mrs. Philip G. Nehro Mr. and Mrs. James Partan Mr. and Mrs. Russell L Peterson Mr. Walter J. Peterson Mr. and Mrs. Joseph W. Sanaer Shirley S. Kane Family Fund Brenda B. Swain Ms. Olivia White Mr. and Mrs. Michael Ziamond

#### THE FUND FOR SANDWICH

2019 Advisory Committee

Madeleine Wing Adler Paul Houlihan Paula Johnson Tom Rockwell

#### **Community Philanthropist**

Madeleine Wing Adler

#### Supporters

Anonymous (2) Mr. and Mrs. Shaune Barry Ms. Mary Bonarrigo Ms. Mary O. Boyle Mr. and Mrs. Edward C. Emma Mr. and Mrs. Peter Fondulas Mr. Paul Houlihan and Ms. Vianna Heath Mr. and Mrs. Robert G. James Ms. Paula M. Johnson Mr. and Mrs. William F. Page Ms. Carolyn A. Weimar

#### THE CHATHAM FUND

#### 2019 Advisory Committee

Henry R. Holden, Chair Larry Capodilupo Richard Costello John King Bill Litchfield Barbara L. Matteson Lynne O'Brien David Oppenheim Chris Rhinesmith John Whelan Chris Wise

#### **Community Philanthropists**

Anonymous (2) Mr. and Mrs. Robert Anderson Tamara and Ken Bazzle Mr. William S. Beinecke\* Mr. & Mrs. John R. Bertucci Jan<sup>\*</sup> and Larry Capodilupo Mr. and Mrs. James R. Carrick Julia and Mark Casady and the One Step Forward Education Foundation. Inc. Mr. and Mrs. Gillis Cashman Chatham Sheetmetal. Inc. Chatham Tercentennial Committee Inc. Mr. Richard Costello Mr. and Mrs. Michael Davin Nicole and Peter Dawes Mr. and Mrs. Douglas Destaebler Mr. and Mrs. William Enlow Adm. and Mrs. William J. Flanaaan, Jr. Mr. Paul Gannon Mr. and Mrs. Michael Gitlin Henry R. and Elizabeth Holden Mr. and Mrs. Lewis F. Horton Rob and Debra Jones John C. Keoah Pam and John Kina Family John and Debi Lashar

Barbara L. Matteson Mr. and Mrs. James McClennan Mr. and Mrs. Christopher J. McCormick Mr. and Mrs. Peter McKay Richard and Jill Murphy Mr. and Mrs. John P. Neafsev Mr. and Mrs. Greaory O'Brien Mr. and Mrs. John O'Neil Ms. Flizabeth H. Odell David and Gail Oppenheim The Perkins Family Pine Acres Realty, Inc. Chris and Sarah Rhinesmith Kathleen and Stephen Rhinesmith Mr. and Mrs. Pieter J. Schiller Judy Schumacher Mr. Jack A. Sebastian Mr. and Mrs. Scott Sipprelle **Trachsel Family Foundation** Mr. John Whelan Pam and Christopher Wise Mrs. Keith P. Young, Jr. Mr. and Mrs. Andrew Youniss

#### Supporters

Mr. and Mrs. James M. Frost Ms. Kathleen K. Mairella

#### Gifts to The Chatham Fund in Memory of Jan Capodilupo

Mr. and Mrs. Nate Accardo Mr. and Mrs. John B. Babcock, Jr. Ms. Wendy Baker and Mr. Bob Minetti Mr. and Mrs. Donald Beck Frich and Connie Bender Mr. David Bixbv Mr. Lee C. Brewer Polly Brown Ms. Lucv Bukowski Ms. Jen F. Bullett Dr. and Mrs. David F. Burns Mr. and Mrs. William J. Callahan Mr. and Mrs. Dale L. Carleton Mr. and Mrs. David Carter Chatham Platform Tennis Association. Inc.

Chatham Yacht Basin Mary and John Conathan Ms. Melissa Crowe Ms. Regina DeFalco Mrs. Rosemary Dillon Ms. Elaine E. Dixon Mr. and Mrs. John V. Doggett Mr. and Mrs. David H. Doherty Ms. Elizabeth B. Doherty Ms. Susan E. Dohertv Eastward Ho! Country Club, Inc. Mr. and Mrs. Ralph L. Ellis Mr. and Mrs. James Michael Elsman Ms. Kelly D. Fox and Mr. Alan D. Goldberg Mr. Evander French Jr. Mr. and Mrs. James M. Frost Gable Building Corp. Mr. and Mrs. John E. Gilligan, III Mr. and Mrs. Stephen Guillard Ms. Ann K. Gunsalus Mr. and Mrs. Raymond Haas Mr. and Mrs. Dean H. Hamilton Ms. Nancy Harold Mr. and Mrs. John H. Harris Ms. Bess M. Hartley Henry R. and Elizabeth Holden HopeHealth Massachusetts. Inc. John M. Evans 2010 Revocable Trust Mr. Craia A. Kappel Mr. J. Richard Kraycir Susan J. Latour League Club of Cape Cod Mr. and Mrs. John J. MacDonald Ms. Kathleen K. Mairella Mr. and Mrs. Gregory C. McCafferv Ms. Anna McCarthy Eileen and Dana Miskell Mr. and Mrs. Neil M. Moss Mrs. Frances Sykes Moyer Mr. and Mrs. Peter M. Muller Mr. and Mrs. John G. Muller Mr. Thomas F. Murphy and Ms. Elizabeth M. Richter Ms. Sue Murray Mr. and Mrs. Stephen L. Nathanson

Mr. and Mrs. Kevin C. Nelson Mr. and Mrs. William OBrien Mr. Robert D. Ollwerther Mr. John O'Toole Mr. and Mrs. George A. Peckham Ms. Elizabeth Perlak Mr. and Mrs. Frederick J. Perlak Ms. Carolyn Phillips and Mr. Stephen Burwick Ms. Elizabeth Phillips Mr. and Mrs. Hale Pulsifer Ms. Judith A. Quinlan R & C Enterprises, Inc. Mr. John K. Roessner, III Mr. and Mrs. William A. Roiter Mr. Paul Ronty, Jr. Ms. Patricia Sachtleben Ms. Eileen J. Samberg Mr. and Mrs. James F. Scaia Mr. and Mrs. Pieter J. Schiller Ms. Joyce L. Shields Ms. Marion S. Smith Mr. and Mrs. Stephen G. Soscia St. Mary's High School Class of 1967 Mr. and Mrs. William W. Storff Mr. and Mrs. Peter J. Tarrant Mr. and Mrs. Toby Taylor Mr. and Mrs. Michael J. Terlizzi Mr. and Mrs. Richard B. Trull Mr. and Mrs. Robert West Mrs. Jovce Kschinka Williams Mr. and Mrs. William D. Younker

#### THE HARWICH FUND

Brian and Nancy Scheld Trey Helliwell Memorial Fund

\* Indicates a Donor who died in 2018

# THE CAPE COD FOUNDATION

#### COMMITTEE ASSIGNMENTS

FINANCE COMMITTEE Mark Quinn, Chair Larry Capodilupo Charlie Helliwell Hank Holden Steve Roderick Sharon Nunes, Ex officio Stefanie Fournier, Ex officio, Non-voting Kristin O'Malley, Ex officio, Non-voting

#### GAY AND LESBIAN EQUITY (GALE) FUND ADVISORY COMMITTEE

Paul Goddu, Chair Richard Johnson, Grants Chair and Past Co-Chair Members at Large: Mark Downey Christopher Hedetniemi Patrick Wendell

## GRANT REVIEW

Mark Quinn, Chair Elliott Carr Dr. C. Patricia Fater Mary Lenihan Lynn Mason-Small Mary Reardon Johnso Brian Scheld Brooks Thayer Linda Zammer

#### 2019 SCHOLARSHIP Committee

Linda Barlow-Palo Liz Bassett Amanda Bebrin Britt Beedenbender Kim Berner Kathy Blackwell Roman Brusovankin Laura Bumpus Bruce Bumpus Andrea Chaitman Ellen Cliggott Carolyn Coates Kathryn Eident Berube

#### ESTHER WALLACE SCHOLARSHIP COMMITTEE 2019

COMMITTEE 2019 Pat Cavanaugh Ann Donner Bonnie Haas Cheryl Hitchings Andrea Kane Karen Lothrup Patti Smith

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#### 2019 OFFICERS

Sharon Nunes, Chairman Ramani Ayer, Vice Chairman Mark Quinn, Treasurer Larry Thayer, Clerk

#### 2019 DIRECTORS

Jacob F. Brown, II Elliott Carr Dr. C. Patricia Fater Henry R. Holden, *Immed* Past Chairman Paul Houlihan Dr. Dana Mohler-Faria Lisa J. Oliver Lisa F. Sherman William Trachsel

#### 2019 STAFF

Kristin O'Malley, President and CEO Joanna Christopher, Marketing & Communications Officer Nancy Coyle, Operations Officer Dara Gannon, Director of Programs and Donor Services Jamie Ghetti, Finance Officer Tracy Kramer, Director of Operations Carrie Thornburg-Bearse, Program Officer Maura White, Office Manager

#### FOUNDERS

John P. English\* Donald B. Foresman\* Mary K. Morgan\* James H. Rice\* S. Murray Rust, Jr.\* William C. Snow

\* Indicates decease

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# THE CAPE COD FOUNDATION INVESTMENT COMMITTEE

Jacob F. Brown, II, *Chair* Paul Doane Michael Garrison Seth Gelsthorpe Hank Holden Hilton Jervey Brooks Thayer

### **INVESTMENT COMMITTEE CHAIR REPORT**

March 2019

ollowing the exceptional results of 2017, 2018 proved to be considerably more challenging. The positive returns generated in the first nine months succumbed to a combination of factors that resulted in a fourth quarter rout of virtually all asset classes, cash being the only safe haven. For the year, performance was down by just under 6%.

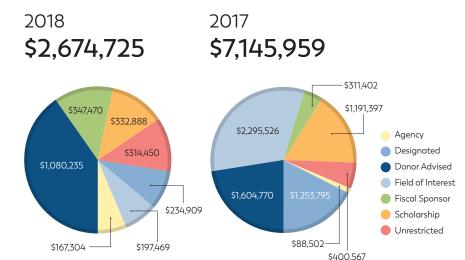
However, the first quarter of 2019 followed with record-setting appreciation as trade negotiations with China appear to be going well, the Federal Reserve has indicated that future interest rate increases are unlikely, employment has remained strong and inflation subdued—factors which are often referred to as a "Goldilocks" scenario. How long this happy combination persists is uncertain but, at the moment, the markets appear to have a positive bias.

The committee continues to maintain a longterm approach to our investment portfolio with only modest changes in asset allocations. And, speaking of the committee, no annual report is complete without a big shout out to the members listed here for their continued engagement and wise counsel—they have my, and your, thanks.

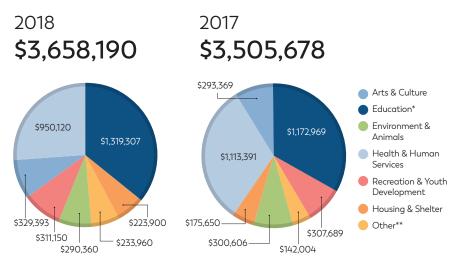
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JACOB F. BROWN, II Chair, Investment Committee

# **GIFTS BY FUND TYPE**



# **GRANTS BY CATEGORIES**



\* Includes scholarships awarded for The Cape Cod Foundation and the Cape Cod Association \*\* Includes Community Development and Religion/Faith-Based

# **FINANCIALS**

#### Years Ending December 31, 2018 and December 31, 2017

	12/31/2018	12/31/2017
ASSETS		
Cash and cash equivalents	\$4,574,099	\$4,060,629
Investments at fair value	53,091,918	58,231,127
Pledges receivable	76,384	56,018
Prepaid expenses	18,935	16,338
Assets under operating leases	444,604	435,244
Fixed assets - net	1,710,816	1,759,265
Total Assets	\$59,916,756	\$64,558,621
LIABILITIES		
Accounts payable and accrued expenses	\$47,390	\$45,172
Deferred revenue	1,155,972	655,972
Grants payable	650,000	650,000
Liabilities under operating leases	466,073	449,421
Fiscal Agency liability	24,449	28,605
Split-interest agreements	207,792	224,686
Agency endowment funds	1,024,787	1,001,964
Total Liabilities	3,576,463	3,055,820
TOTAL NET ASSETS	56,340,293	61,502,801
TOTAL LIABILITIES AND NET ASSETS	\$59,916,756	\$64,558,621

#### STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

REVENUES, GAINS AND OTHER SUPPORT Contributions, grants, and gifts Change in split interest agreements Investment Income (Loss) Other Income Total Revenues, Gains, and Other Support	\$2,484,472 (27,622) (2,825,129) 67,655 <b>(300,624)</b>	\$7,057,537 (6,429) 7,561,324 71,168 <b>14,683,600</b>
EXPENSES Program Services Direct Conduct of Charitable Activities Community Services Total Program Services	4,146,140 197,169 <b>4,343,309</b>	4,666,283 216,258 <b>4,882,541</b>
Supporting Services General and Administrative Fund Development Total Supporting Services	294,072 224,503 <b>518,575</b>	296,961 213,198 <b>510,159</b>
TOTAL EXPENSES CHANGE IN NET ASSETS NET ASSETS, BEGINNING OF YEAR NET ASSETS, END OF YEAR	4,861,884 (5,162,508) 61,502,801 \$56,340,293	5,392,700 9,290,900 52,211,901 \$61,502,801

This is an Unaudited Financial Statement only. For a copy of the Audited Financial Statements of The Cape Cod Foundation audited by Anstiss & Co. P. C., please call the office at 508.790.3040.

In 2018, we lost two extraordinary friends. Jim Rice and Roger Ludwig were fully committed to The Cape Cod Foundation. They were also fully committed to the communities they served.



Throughout his life, Jim was dedicated to civic volunteerism. He was one of The Cape Cod Foundation's six founders and served on the Board of Directors from 1988-1992. He served as Chairman of the Cape Cod Hospital Board and gave his time, talent, and treasure to the Orleans Planning Board, Rotary Club, Little League, Sea Scouts, and other organizations, too numerous to count. Jim helped many organizations start, grow, and thrive. During his final months, he continued to stay abreast of, and help, more than a dozen nonprofits on Cape Cod.



Roger served on The Cape Cod Foundation's Board of Directors from 2002-2007. As a trustee of the Frank X. Weny & Mary Ethel Weny Charitable Trust, he was instrumental in establishing a four-year scholarship fund at the Foundation for students from Cape Cod who are living with Type 1 diabetes. He also founded the Weny Diabetes Resource Center and served on the Board of Directors for the YMCA Cape Cod and Cape Cod Museum of Art. In 2007, Philanthropy Partners of the Cape and Islands named him "Outstanding Philanthropist."

If "one lives in the hope of becoming a memory," Jim and Roger will be remembered for many years to come. Their vision, leadership, generosity, and commitment have left a lasting impression on the communities and people they served and embraced.



Building Resources. Granting Opportunity.

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