

2007-2008 Annual Report

118 Union Avenue P.O. Box 613 Framingham, MA 01704 TEL: 508-626-0404 www.kfne.org

Founded 1953

This report initially presented at the New England District
Convention, Warwick, RI, August, 15, 2009, and includes portions of the report by
independent auditor, Samick & Boodman - Certified Public Accountants
for year ending September 30, 2008

Contents

President's Message 1
Officers and Directors
Purpose & Mission Statement of KFNE 3
History of the Foundation 4
Red Jackets and Kiwanis Pediatric Trauma Institute 5
Kiwanis "10K for Kids" Family Walk 6
Foundation Collage 7
Annual Gifts (Clubs and Individuals) 8
Morton Medal and Morton Society 9
New England Revolution
Hap Gerrish Kiwanis Pediatric Trauma Registry 11 Shaw's Community Rewards program
Finances 12-13
Sponsors Back Cover

The historical accounts in this book were compiled with the help of Ann M. Beale, Gene Burman, Harold T. "Hap" Gerrish, DMD, R. Alan Hartnett, James A. Levesque, John J. Maihos, Robert P. "Bob" Moro, Martin T. Olsen, Wanda Baril, and Paul R. St. Laurent. Many photos by Tony Cercena.

Every effort was made to ensure the information in this report was accurate. If you see an error or omission, please email annualreport@kfne.org or write KFNE, 118 Union Ave., P.O. Box 613, Framingham, MA 01704.

President's Message

My Fellow Kiwanians,



This is the fourth comprehensive Kiwanis Foundation of New England (KFNE) Annual Report. This report for fiscal year 2008-2009 will be distributed directly to every club in the New England District via the club secretary. Individual donors will receive one by mail and reports will be available at New England District functions throughout the year.

We encourage Kiwanians and others to support the John D. Morton Society, a giving program named for a Past Governor of the New England District and the only Kiwanis International President from our district. Individuals who donate \$25 or more to this fund become members of the Morton Society. Those who give at least \$5000, or pledge through their will or estate, receive the John D. Morton Society Medal. This is a planned giving program and we hope that you will consider "Leaving a Legacy."

Our partnership with the New England Revolution soccer franchise has completed its 9th year. This partnership has provided Kiwanis clubs many opportunities:

- 1. To create a service project by taking kids to a major league soccer game.
- 2. Raise funds for KFNE and
- 3. Most importantly, enhance the brand identity of Kiwanis all year on the Revolution website and during Kiwanis Family Night at Gillette Stadium.

The Hap Gerrish Pediatric trauma Registry fund raising is complete, Gerrish, a former New England District Governor and one of the founders of KPTI, died of cancer. The Registry, in his honor, is a KFNE, KPTI, and Floating Hospital for Children endeavor to help injured children throughout the world. The Internet-based registry will be accessible worldwide by rural hospitals and pediatricians, researchers and anyone in need of information on how to care for pediatric trauma patients. This project is a continuation of twenty-six years of commitment by New England Kiwanians to improve the care of injured children.

Every Kiwanian in New England is a member of the KFNE with a vested interest in how our foundation is performing. Let your district foundation work for you. We continue to need funds to support our programs, particularly KPTI. Please donate generously on an ongoing basis.

Art Creighton President

2008-2009 Officers and Directors

Arthur F. Creighton, Jr.*, President Robert P. "Bob" Moro*, President-elect Albert "Al" Paul*, Vice President Wanda J. Baril*, Secretary James Tallo*, Treasurer Paul J. Donato, Sr..*, Immediate Past President

David Wyskiel, Parliamentarian

Elected Board Members

Robert H. Allen Valeda P. Grills Martin T. Olsen, Jr. Ann M. Beale * R. Alan Hartnett David Peterson Art Berardino William Matteson Robert S. Widegren David F. Darling Edward Murphy *

Appointed Board Members

Richard J. England* Bill Jenkins John J. Maihos Cindy Perham Bill Wayne

* - Executive Committee

Past Presidents

William Cantor James A. Levesque William H. Gleason Robert L. Bernstein N. Blake King **Roger Boucher** Robert I. Callahan Edward F. Bourque Thomas H. Wright **Albert Dezois Gilbert Beers Albert Cirillo** Gene Burman Robert George **Peter Post** David Lockwood Ann M. Beale Harold T. Gerrish, DMD

R. Alan Hartnett Jay Allen Ross Martin T. Olsen, Jr. Paul J. Donato, Sr.

Purpose of KFNE

From Bylaws of the Foundation (Abbreviated)

The purposes of the Foundation shall be:

A. To receive property, including gifts from the members of the Kiwanis Clubs of the New England District, and others, and to solicit the receipt of property.

B. To make payments to corporations, trusts, funds or foundations organized and operated exclusively for religious, charitable, scientific, literary, or educational purposes.

C. To make payments to or for the benefit of the poor, needy and deserving persons, giving preference to persons who, while not paupers, have become in need to financial assistance because of misfortune, or to persons who, by such assistance, may be aided to become self-supporting, to acquire an education or training, or perform useful or creative work to become more useful citizens.

D. To make payments to or for persons for the advancement or promotion of science, learning, medicine, surgery, literature, music, art, or human welfare.

Mission Statement

From KFNE Policy Manual

The Kiwanis Foundation of New England, Inc., (KFNE) is the 501(c)(3) non-profit charitable Fund-raising arm of the New England District of Kiwanis International (NEDK). The mission of the Foundation is to work in partnership with the New England District of Kiwanis and others to effect programs for the betterment of communities in New England and beyond, with special focus given to programs which affect young children.

History of the Foundation

The Kiwanis Foundation of New England was incorporated as a 501c(3) charity in 1953. It was initially created to collect tax-deductible funds from Kiwanians and other contributors, for a scholarship program to benefit a student in each of the six New England states.

The \$3000 budget for the scholarship program (to fund six \$500 awards) was quite high for the mid 1950s. It was this initiative that eventually led to the creation of the "Friends of the Foundation" program. Each contributor of \$1000 received a Foundation Red Jacket.

In 1978 the Foundation took a bold step. They asked then-President, Harold "Hap" Garrish, DMD, to "search for a dramatic and appropriate project that KFNE could undertake and that could be renowned throughout New England and funded by the New England District of Kiwanis (NEDK) membership." With almost 10,000 Kiwanis members in the district at the time, a focused project could have a huge impact in the region.

Dr. Gerrish approached Dr. Ed Wyman, head of the Fracture Clinic at the Massachusetts General Hospital. After much discussion, Dr. Wyman suggested helping traumatized children. Doctors at the time knew that children reacted differently than adults to trauma, but no area hospital was conducting research. Dr. Wyman knew Dr. Jerry Grossman, who was leaving Massachusetts General Hospital for Boston's Floating Hospital. He was to head a new state-of-the-art pediatric clinic.

After numerous meetings with Floating Hospital officials, a project was presented to the KFNE board; the research center would be supported by Kiwanis. The center would focus on treatments administered to children, and share results throughout the medical community. Education was also a priority; paramedic personnel would learn the difference in medical treatments between children and adults.

The cost of the program was \$245,000 per year, and New England members accepted the challenge. For nearly ten years, clubs and members gave to the Foundation for KPTI.

In 1990 a proposal to permaently fund KPTI was accepted by the Board of Trustees. A \$3 million endowment (at an assumed 8% return) would provide funds for fixed expense at the time. Although the Foundation hasn't missed a payment, declining market rates have affected the project. The success of this important program will depend on the continued generosity of Kiwanians and friends around New England.

Contributions to the KPTI endowment are still needed. Red Jackets and Crest Upgrades will continue to benefit the pediatric program.

Today, the Foundation has created new ways to raise money, especially unrestricted money, so that other projects can be adopted. The Morton Society is one of the newest programs, and has been a success since its inception.

A new initiative was launched to raise an additional \$1.5 million dollars which will increase our endowment to \$5 million dollars, (which at an assumed rate of return of 5%) should insure that we will continue to make our payment of \$245,000 each year to KPTI. This initiative is called "Strive for Five". We anticipate raising the additional funds through the "Shaw's Register Receipt Program"; conducting a 10K Walk, and the new Gerrish/ Engdahl Memorial Golf Tournament.

Red Jackets & Kiwanis Pediatric Trauma Institute



The Red Jacket is awarded to people who have shown great support of the KPTI Endowment Fund. They also make great gifts for special members of your club, or special people in your life.

2007-2008 Participating Clubs and Individuals

Richard P. Morello Kimberley Michaud Sarah Glynn

Charles Rodosta Bruce DeRosa

Kiwanis Foundation of Worcester

John MacKay Michael J. Langan Bob Duarte Roberta Reed Deb Landwear Dr. William Wood

Berlin High Key Club

Kiwanis Club of Standish, ME Retailers Association of Mass

Ronald Forest Albert Mangini Kiwanis Club of Chittenden

County, VT Doug Guerin

Davuid Wyskiel Rose Pisani Kiwanis Club of Scarborough, ME

Donald Blair Edward J. Wojcek Ralph Wright Tim Hague Russell Gora James Van Tassell Pamela S. Feyler

Kiwanis Club of Roslindale/West

Roxbury

William J. Murray Tony Sakowich

Crest Upgrades:

Renew your commitment to the KPTI Endowment Fund. Various levels of recognition are available from Trauma Fellow/Lady to the Honor Council. Upgrade for yourself, another Kiwanian, or a friend.

Suzanne Lemak

Kenneth Lindquist



Kiwanis "10K for Kids" **Family Walk**

On Saturday, October 13, 2007, the Kiwanis Foundation of New England sponsored its first 10K for Kids walk. The event took place in Worcester, MA and was attended by members from around New England as well as Kiwanis International President, Dave Curry and First Lady Eve! Approximately \$15,000 was raised, which was split with the Kiwanis International Foundation.

Robert E. Tandy Deirdre McMahon Tomothy McMahon Albert D. Paul, Jr. Richard J. England Salvatore Salemi Walter Mansur Schwidde Donald Gammon Edward Hart Steven Stewart Jane Richie Kiwanis Club of Greater Lawrence John Colucci John O'Keefe Robert Malocco John G. Schuler Browne Caldwell Kiwanis Club of Presque Isle, Inc. Kiwanis Club of Brunswick, ME Scott Murray Patricia Beckwith Mary Ann Houston Patrick Reilley Fredric Franzius Laurie Wray

Robert Risselle Thomas Carli Glenn A. Rogers **GCHI** Northeast Health Cafe Miranda George Hall & Sons William T. Matteson Dean Porteous Edward F. Murphy Suzanne Lemak Beth Medeiros Alice Savage Brenda Batty Carl Loomis David Wyskiel Linda Loomis Robert Brunell Bill Barney Paul Scopa Patricia Stevens Wlater Read, Jr. Antionette Walker Suzanne Reniewicz Pro-Concrete Edwin & Edith Berry Pen-Bay Glass

Donna E. Wood Pruitt Masters & Alex Norton

Steven T. Hill Maritime Energy Aqua Marine, Inc. Jess's Market, Inc. David Ray Todd Bergeson Maureen Halley Sharon Hall Craig Burnham Sharon Scofield David Fabri Joyce Goff Zelda Giott Jonanthony Freeman Michael Ferrante Kenneth Freeman Susan Gorden Stephen Krupsky Kevin Dalton Nancy Yorgy Roger Finch Joseph Karaman Jerry Guilebbe Jerald Parisella Pamela Tracey Joyce Brown Jeannie Conti Jeffrey Poulin Michael Birch

Russell Stevens Sumner Kinney John Parkman Linda Tatelbaum **Betty Jones** Carl Lambrecht Gary Cran Edward Miller H. Parsons Barbara Hanson Richard Crossman Cathy McGuiness Pasquale Serio David Pike Corey Pitcher Robert Cavanaugh My Print & Copy, LLC S.P. Brown Excavating B&D Supply, Inc. Kevin Decy Beverly National Bank Citizens Bank Child Safety Solutions Garrison & Sons Steven Smith Wayne Spencer Cheryl A. White Wal-Mart Foundation

Kiwanis Club of Manchester VT Linda Cunningham LaPlaca Kiwanis Club of Roslindale/West Roxbury Kiwanis Club of Revere Kiwanis Club of Rockland, ME Kiwanis Club of Medford

Kiwanis Club of New Britain Kiwanis Club of Wallingford Rockland Janitorial Services Bumiller & Co. Catering Kiwanis Club of Hudson, Inc. Kiwanis Club of Meriden Blue Cross and Blue Shield

In kind donations from: **WBCN** Polar Beverages Worcester Telegram & Gazette Microsoft Brothers in Arms Construction



HOST YOUR OWN 10K for Kids Kiwanis Family Walk

Proceeds benefit kids around New England and a local 501(c)3 of your choice.

For more information, email 10kforkids@newenglandkiwanis.org

Foundation Events & Members



Annual Gifts

The Annual Club Gift Campaign (formerly "Saddlebag Campaign") runs from October 1 to September 20. It provides the Foundation with its primary source of unrestricted income. The funds help determine what programs the Foundation will be able to continue to support.

Suggested Annual Donation starts at \$5 per member. 2007-2008 Participating Clubs

Kiwanis Club of Scarborough Kiwanis Club of Somerville Kiwanis Club of Barre Kiwanis Club of Laconia Kiwanis Club of Natick Kiwanis Club of Dennis-Yarmouth, Inc. Kiwanis Club of New London Kiwanis Club of Beverly, MA Kiwanis Club of Manchester, VT Kiwanis Club of Bangor, Noon Kiwanis Club of Pembroke, Inc. Kiwanis Club of Hudson, Inc. Kiwanis Club of Brockton Kiwanis Club of Waterville, ME Kiwanis Club of The Shoreline Kiwanis Club of Marble Valley Kiwanis Club of Auburn Kiwanis Club of Malden Kiwanis Club of Wallingford Kiwanis Club of Chelsea Kiwanis Club of Augusta, ME Kiwanis Club of Brewer, Inc. Kiwanis Club of New Britain, Inc. Kiwanis Club of Sandwich, MA Kiwanis Club of Manomet Kiwanis Club of Medford Kiwanis Club of Concord, NH Kiwanis Club of Sheffield, MA Kiwanis Club of Dover-Foxcroft, ME Kiwanis Club of Holyoke, Inc. Kiwanis Club of East Boston Kiwanis Club of MDI, ME Kiwanis Club of Revere Kiwanis Club of Easton Kiwanis Club of Mooshead Lake, ME Kiwanis Club of Scarborough Kiwanis Club of Mt. Washington, NH Kiwanis Club of Mashpee Kiwanis Club of Pembroke-Allenstown Kiwanis Club of Rockland, ME Kiwanis Club of Westfield, Inc. Kiwanis Club of Rockland, MA **Kiwanis Club of Torrington** Kiwanis Club of Brunswick, ME Kiwanis Club of Westbrook Kiwanis Club of Danvers Kiwanis Club of West Springfield/Agawam Kiwanis Club of New Canaan Kiwanis Club of Peabody Kiwanis Club of Upper Valley Kiwanis Club of Otis Kiwanis Club of Fairfield **Kiwanis Club of Everett** Kiwanis Club of Presque Isle, Inc. Kiwanis Club of Hingham-Weymouth Kiwanis Club of Montpelier, Inc. Kiwanis Club of Hooksett, NH **Perry Henderson Foundation Trust** Kiwanis Club of Keene, NH

Individuals - Sustaining Donors

Kiwanians distinguish themselves as Sustaining Donors by annual giving. Kiwanians are offered a Sustaining Donor pin to show their continued support of New England Foundation projects.

John D. Morton Society



Established by The Kiwanis Foundation of New England Board of Directors in August, 2003, this program honors those men and women who make gift provisions to support our Kiwanis Foundation of New England.

Named for the late John D. Morton of Berlin, New Hampshire, he was the first person from the New England District to be elected President of Kiwanis International,

serving 1991-1992. Therefore, we honor the Foundation's exceptional donors in honor of John's exceptional leadership of our worldwide organization.

The following people are Morton Society Members (gift of \$25 or more):

James A. Roehm Wanda J. Baril Kimberley I. Michaud Paul E. Michaud Carolyn B. Perry James A. Banks, Sr. Glenn Frost Michael J. Langan Kathy Fenoff Dayna Strout

Arthur Creighton, Jr. Michael I. Salem Richard J. England Jack Brown **Eugene Market** Nvoka Nixon Wayne H. Nixon Beverly S. Daley John H. Daley, Jr.

The Morton Medal

To encourage current as well as future gifts from individuals as well as clubs, the Foundation will bestow a numbered medallion to the donor or honoree when either of two criteria are met:

- 1. An outright gift of \$5,000 or more (individuals or clubs) or
- 2. A planned gift commitment of \$5,000 or more (individuals only.)

The following people are Morton Medal recipients:

01 - Jackie Morton 02 - Ann M. Beale 03 - Paul St. Laurent * 04 - Howard L. Harper, Jr. 05 - Martin T. Olsen, Jr. 06 - John H. Cushing 07 - Gordon Jackson 08 - Robert A. Masys 09 - Nancy R. Masys 10 - Michael W. Grossi 11 - Harold (Hap) Gerrish * 12 - Juanita Cushing

13 - Roland G. Santoni * 14 - Jason B. Briggs

15 - Timothy McMahon

16 - Deirdre McMahon

17 - Ronald Forest 18 - Donna Forest 19 - Suzanne Lemak

20 - Jozef Lemak 21 - Monika Bryant

22 - John J. Maihos 23 - Albert D. Paul

24 - Arthur E. Engdahl, Jr. *

25 - Arthur F. Berardino 26 - Robert Allen

27 - Todd Delaney

28 - Alice Savage

*- Deceased

LEAVE A LEGACY[®]

New England Revolution



2007-2008 Participating Clubs and Individuals

Kiwanis Club of New London
District Convention
Fall Conference
Midwinter Conference
David A. Peterson
Janathan A. Greene
Kiwanis Club of Danvers
Mark J. Bucksbaum, M.D.
Kiwanis Club of Lower Cape Cod
Kiwanis Club of Hooksett, NH
Kiwanis Club of Winchendon
Kiwanis Club of Manchester, NH
Kiwanis Club of Hudson, Inc.

Steven R. Marcoux

Sharon M. Quinn

Diana L. Fabbie-Mendonca Francis J. Kinahan Anastasios Hatsiopoulos David R. Hill Kiwanis Club of Natick Martin T. Olsen, Jr. Kiwanis Club of Upper Valley Universal Servicing Inc. JoeLemak Arthur F. Creighton, Jr. Robert Moro Jonanthony E. Freeman Constance L. Potter Francois M. Curiel Sotha Keth John J. Maihos

Visit the New England Revolution website at http://revolutionsoccer.net



A new initiative was launched to raise an additional \$1.5 million dollars which will increase our endowment to \$5 million dollars, (which at an assumed rate of return of 5%) should insure that we will continue to make our payment of \$245,000 each year to KPTI. This initiative is called "Strive for Five". We anticipate raising the additional funds through the "Shaw's Register Receipt Program"; conducting a 10K Walk, and the new Gerrish/ Engdahl Memorial Golf Tournament.

The "Hap Gerrish" Kiwanis Pediatric Trauma

Registry

Harold T. 'Hap' Gerrish, DMD, joined Kiwanis in 1957, and *served* the organization. He was a member of the Kiwanis Club of Dover-Foxcroft, club president in 1965, Lieutenant Governor in 1967,





TRAUMA REGISTRY

and Distinguished Governor in 1991-1992. He dedicated 28

years to the KFNE Board and was President from 1981-83.

Dr. Gerrish also served on Tufts-New England Medical Center board for over twenty years, and was co-founder of the Kiwanis Pediatric Trauma Institute.

Dr. Gerrish died at 76 on June 29, 2006 in Bowerbank, Maine on Sebec Lake.

Today we honor Dr. Gerrish for his service to the Children of the World through The "Hap Gerrish" Kiwanis Pediatric Trauma Registry.

Kiwanis Club of Three Rivers Kiwanis Club of Otis Kiwanis Club of Upper Valley Kiwanis Club of Middletown Kiwanis Club of Dexter Sunrise Kiwanis Club of Salem, NH Kiwanis Club of Sandwich, MA Hiram Thomas Gerrish Dennis K. Keller Tricia Tomczyk Gordon Canning, Jr. Mary Lynn Vernon Frank O'Brien



Register your card to benefit the Kiwanis Foundartion of New England.

Visit www.shaws.com Click on the "Learn" tab and then slect "Community Rewards." Click on "Shopper Login/Register."

Kiwanis Foundation of New England CODE is 49001019000

Questions/problems? Contact webmaster@kpti.org

Comparative Statement of Financial Position

as of September 30, 2008 and September 30, 2007

Independent Auditor's Report also available

ASSETS

	2008	2007
Current Assets:		
Cash and cash equivalents	\$ 125,170	\$ 233,209
Prepaid expenses	605	605
Total Current Assets	125,775	233,814
Investments	3,013,736	3,575,286
Office Furniture and Equipment	7,157	7,157
Less accumulated depreciation	(7,157)	<u>(7,060)</u>
Net Furniture and Equipment	-	97
Total Assets	<u>\$3,139,511</u>	\$3,809,197

LIABILITIES AND NET ASSETS

Total Liabilities and Net Assets

Current Liabilities: Grants payable Total Current Liabilities	172,861 172,861	240,304 240,304
Net Assets: Unrestricted Permanently restricted Total Net Assets	(940,872) 3,907,522 2,966,650	(6338,629) 3,907,522 3,568,893

\$3,139,511

\$3,809,197

See notes from full Financial Statements available on request from the KFNE office.

Fund Balances at September 30, 2008 were as follows:

	<u>Un</u>	<u>restricted</u>	Restricted
Kiwanis Charity Fund	\$	89,666	\$ 145,500
Friends Fund	(1	,144,364)	2,143,906
General RE		44,188	1,400,000
Heather Levesque Fund		3,192	-
James Levesque Fund		1,176	2,100
N.E. Disaster Fund	(4,471)	-
District Sponsored Youth Scholarship Fund	d	1,993	20,000
White Endowment Fund		9,915	24,000
Azad Strazzulla Memorial Fund		12,351	26,025
Chester Bogushas Circle K Scholarshij	p (88)	11,000
Hartford Hospital *		2,078	-
Bay State Medical Center *		2,448	-
Rhode Island Hospital *		6,757	14,314
Kiwanis Club - Natick	(14,228)	85,000
Kiwanis Club - Randolph	(7,526)	31,986
Club Escrow		12,043	2,691
New England District Key Club Project	ct	2,847	-
KAPTC		243	1,000
New Charities		1,472	-
EMMC		2,379	-
911 Fund		9,945	-
Hap Gerrish Registry		<u>27,113</u>	
TOTAL	<u>\$</u>	s(940,872)	\$3,907,522

*- Pediatric Trauma Care Fund

SOURCE: Independent Auditor's Report from Samick & Boodman February 13, 2009

SPONSORS

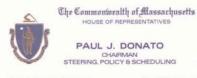
The following individuals and companies have helped make this annual report possible. THANK YOU.



Martin T. Olsen, Jr., PDG Immediate Past President Kiwanis Foundation of New England

101 Shore Drive Lyme, CT 06371 Phone: (860) 434-62 Fax: (860) 434-24

E-mail: martin_t_olsen@sbcglobal.net



ROOM 185, STATE HOUSE BOSTON, MA 02133 TEL. (617) 722-2960 FAX (617) 722-2713 Rep. Paul Donato © hou. state. ma. us 271 SPRING STREET MEDFORD, MA 02155 TEL. (781) 395-1683 FAX (781) 395-2871 RepDonato38@aol.com



Compliments of

Valeda P. Grills

Proud to be a KFNE board member

Compliments of

Robert H. Grills

Kiwanis Club of New London Connecticut





27 Pearl Street • Beverly, MA 01915 ph: (978) 922-6311 • cell: (978) 804-7143

john@justicejohn.com • www.justicejohn.com Notary Services Available

MEDICAL ALARMS USA

Michael T. Smith

1-800-432-7502

www.medicalalarmsusa.com

"Go Ahead... Push Our Button"



Six Victoria Street Everett, MA 02149

Art Berardino, President

"If we can't Print it Nobody Can"

Commercial Printing – Direct Mail Marketing

Apparel – Promotional Products

art@statelinegraphics.com www.statelinegraphics.com

Tel: 617-389-1200

Compliments of

Al Paul

Proud member of the Kiwanis Club of Rutland Kiwanis Club of Marble Valley

Special thanks to Art Berardino and State-Line Graphics for assistance in preparing and printing this report.