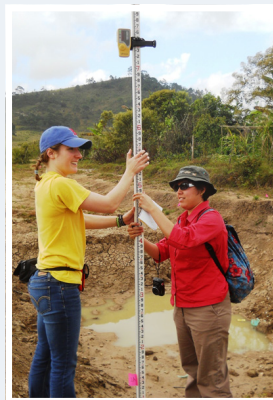




Annual Report 2011



Letter from the President

Dear Friends,

Two thousand and eleven was an exciting year for the Woodard & Curran Foundation. We raised \$34,000 in our very first outreach campaign from 128 Woodard & Curran employees, plus significant funds from other partners. We launched the Foundation's website, Facebook page, and our Twitter account. Two successful road races helped to spread the good word of the Foundation, and in October the Foundation issued its first grant - \$5,000 to Engineers Without Borders' University of Maine student chapter for its sanitation project in Dulce Vivir, Honduras.

Our goal for this annual report is to thank you for your support, highlight accomplishments and initiatives, and report on the 2011 fiscal year, ending December 31, 2011.

Thank you for your part in supporting our mission. We look forward to a productive and exciting year in 2012.

Sincerely,

Thomas Francoeur

President

The Woodard & Curran Foundation

Woodard & Curran's commitment to contribute to the communities it serves and to support employees' charitable causes have always been central to the firm's vision and values. In 2010, the Woodard & Curran Foundation was established to cultivate financial resources in addition to the firm's annual corporate giving budget, allowing the Foundation to make substantial and meaningful contributions.

MISSION: The Woodard & Curran Foundation was established to further Woodard & Curran's vision of exemplary corporate citizenship by growing and investing financial resources beyond corporate financial limitations with meaningful contributions to causes aligned with our values.

VISION: The Woodard & Curran Foundation is a public nonprofit organization dedicated to making grants that empower local and global solutions for a healthier world. The Foundation directs donations to causes incorporating the environment, health, education, and civic endeavors. Its immediate financial goal is to raise a \$1 million endowment by 2015 through donations and fundraising events.

Structure and Organization

The Foundation is a 501(c)(3) public not-for-profit organization, established in the State of Maine. In 2011 it was governed by a 9-member Board of Directors that met the first Tuesday of every month.

The Board year runs from October 1st to September 30th. Annual meetings are held in October to discuss accomplishments of the past 12 months, plan for the next year, and elect Board members and Committee chairs.

Directors for the 2010-2011 Board year were:

Duff Collins, *Sharon, MA*
Susan Dubuque, *Cape Elizabeth, ME*
Thomas Francoeur, *President, Lyman, ME*
M. Joseph Geary, *Lynn, MA*
Althea Masterson, *Secretary and Treasurer, Gorham, ME*
Doug McKeown, *Scarborough, ME*
Bruce Nicholson, *Brunswick, ME*
Jay Sheehan, *Simsbury, CT*
Barry Sheff, *Vice President, Cumberland, ME*

The Foundation has four standing committees:

- **Giving Committee** – Bruce Nicholson, Chair. The Giving Committee works to define the process and criteria for the Foundation's grant giving. It annually recommends grant recipients to the Board for its approval.
- **Development & Fundraising Committee** – Duff Collins, Chair. This committee advises, oversees, and manages the Foundation's fundraising activities to reach its goal of raising \$1 million in five years.
- **Public Relations & Communications Committee** – Jay Sheehan, Chair. This group focuses on sharing information and educating people about the Foundation and generating high levels of participation within and outside of Woodard & Curran through social media, mailings, news releases, and Woodard & Curran's employee and client newsletters.
- **Executive Committee** – Thomas Francoeur, Barry Sheff, Althea Masterson. This committee consists of the Board's officers and is responsible for governing the activities of the Foundation.

Activities

The Foundation conducts an annual Fall fundraising campaign directed at Woodard & Curran employees, vendors, and business associates. In its inaugural year, the Fall 2010 campaign raised over \$34,000 in Woodard & Curran employee donations alone.

Two major road races were held in October 2011 to spread the good word of the Foundation, in Portland, ME and Pawtucket, RI. The Foundation would like to thank major partners WMTW8 Portland, Portland Trails, Whole Foods, and Woodard & Curran.

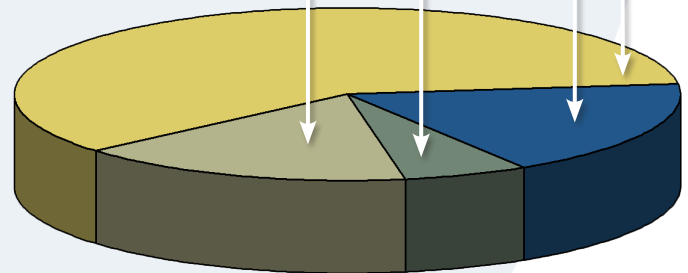
Grant-making activities took place in the summer and fall, with grant applications due by August 15th, at which point 28 applications had been received. On October 21st, a \$5,000 grant was awarded to Engineers Without Borders' University of Maine student chapter for its project in Dulce Vivir, Honduras to build a safe and effective sewage treatment and disposal system.

Finances

There are no paid positions associated with the Woodard & Curran Foundation. Work is accomplished with volunteers and through in-kind donations. The Foundation Treasurer is responsible for the financial records and oversees the Foundation's savings account. When the new Board year began in October 2011, M. Joseph Geary was elected Treasurer. The Board has established the goal to identify pro bono financial assistance in 2012 for guidance in the areas of investments and money management.

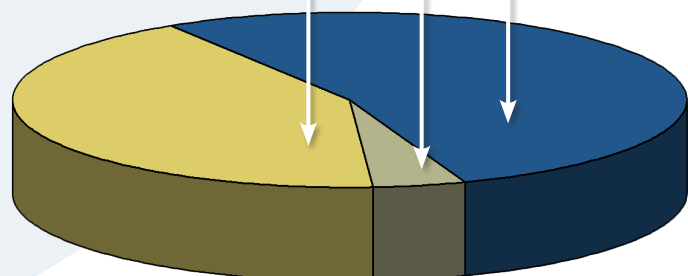
Revenue *Financial Year 2011*

\$49,456.71 - **Woodard & Curran Employees/Employee Fundraisers**
\$15,000.00 - **Woodard & Curran Inc. Donations**
\$5,025.00 - **Private Support**
\$13,619.05 - **Beginning Balance**
\$83,102.76 - **TOTAL Revenue**



Expenses *Financial Year 2011*

\$5,000 - **Grant Award**
\$410.00 - **Administrative Costs**
\$3,980.10 - **Event Expenses**
\$9,390.00 - **TOTAL Expenses**



Committee Year-End Reports

Giving Committee

The 2011 Giving Committee was comprised of 12 individuals representing employees from all Woodard & Curran business groups and diverse geographies. Efforts began immediately to develop a work plan and lay the groundwork for a grant process that could be followed for years to come.

The Committee conducted a survey of Woodard & Curran employees to identify levels of interest in four areas: the environment, civic causes, education, or health. It also was crafted to determine if donors were more passionate about local causes or those with global impact. With the survey results showing no particular preferences, the Committee decided to make a recommendation that touched the greatest number of the four areas.

The next months were spent developing the grant application and evaluation worksheet. Twenty-eight applications were received by the grant deadline, and the Committee reviewed and scored each. After several rounds of review, the Committee made a selection, which was unanimously approved by the Board of Directors, and the \$5,000 grant to Engineers Without Borders' University of Maine student chapter was awarded on October 21st. The Committee notified all applicants, thanked them for participating, and encouraged them to resubmit for future grants.

The Committee established goals for 2012 that include streamlining the application and fine-tuning the evaluation process.

Development & Fundraising Committee

The 2011 Development & Fundraising Committee was comprised of 11 active members. The Committee created sub-committees related to major donor development, fundraising within Woodard & Curran, fundraising outside of Woodard & Curran, and vendor outreach. It also created systems for registration and payment for fundraising events; developed systems to solicit and track donations; and made significant strides in discussions related to vendors.

The inaugural Woodard & Curran Employee Outreach Campaign raised \$34,000, giving the Foundation a strong financial base. Additionally, the Committee partnered with other committees to launch road race events in Maine and Rhode Island, which included race rallies in four offices. By design, the road races were created to build publicity in different communities, which they successfully did with 100 - 150 participants at each race. With the efforts of many dedicated committee members and employees, the community outreach efforts surrounding this event raised over \$10,000.

The Committee established 2012 goals that include the return of the Easy as Pi Road Races with possible expansion to other office locations, at least three events in non-road race geographies, continued improvements to processes and systems, more interaction with the Board for major donor contributors, and increased partnership with other Foundation committees.

Public Relations & Communications

The 2011 Public Relations & Communications Committee had 8 members. It began the year by developing its mission, vision, and charter, and then created an overall communications plan. Additional important initial assignments were developing a Foundation logo, tagline, and website and instituting a social media program.

The Committee publicized the Giving Committee's survey, completed the work to enable web-based grant applications, and issued news releases and web updates when the grant was announced.

A great deal was accomplished to publicize the Easy as Pi road races, beginning with the development and execution of a broad-based communications plan. Support also included researching and enabling credit card registration via the Foundation website.

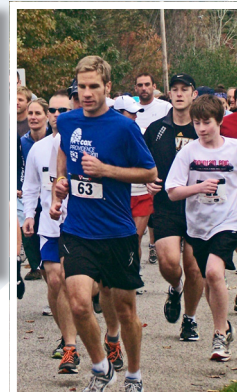
In the Fall, comprehensive support was provided for the Employee Outreach campaign, which involved internal communications and posters; organizing, scheduling and holding rallies in all Woodard & Curran offices; and developing and organizing the writing of thank-you notes to all donors.

Throughout the year, the Committee wrote updates for Woodard & Curran's employee newsletter and the Foundation's website. This committee also is responsible for this annual report.

Goals for 2012 include heightened participation in social media, development of communications plans for all Foundation events, and assignment of a committee member to head up carrying out the plan for each Foundation event.



Engineers Without Borders' student chapter at the University of Maine received the Foundation's inaugural grant: \$5,000 for a project in Dulce Vivir, Honduras, to build a safe and effective sewage treatment and disposal system. Students accepted the award at the Easy as Pi road race in Portland on October 21st. A second race was held in Providence on October 22nd.



Cover photos courtesy of EWB-UMaine; race photos courtesy of the Woodard & Curran Foundation.

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