

The **W. W. SMITH**

CHARITABLE

TRUST

*2006 and 2007
Report*



Reflections on 30 years of giving

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THE W. W. SMITH CHARITABLE TRUST

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SARA HOME

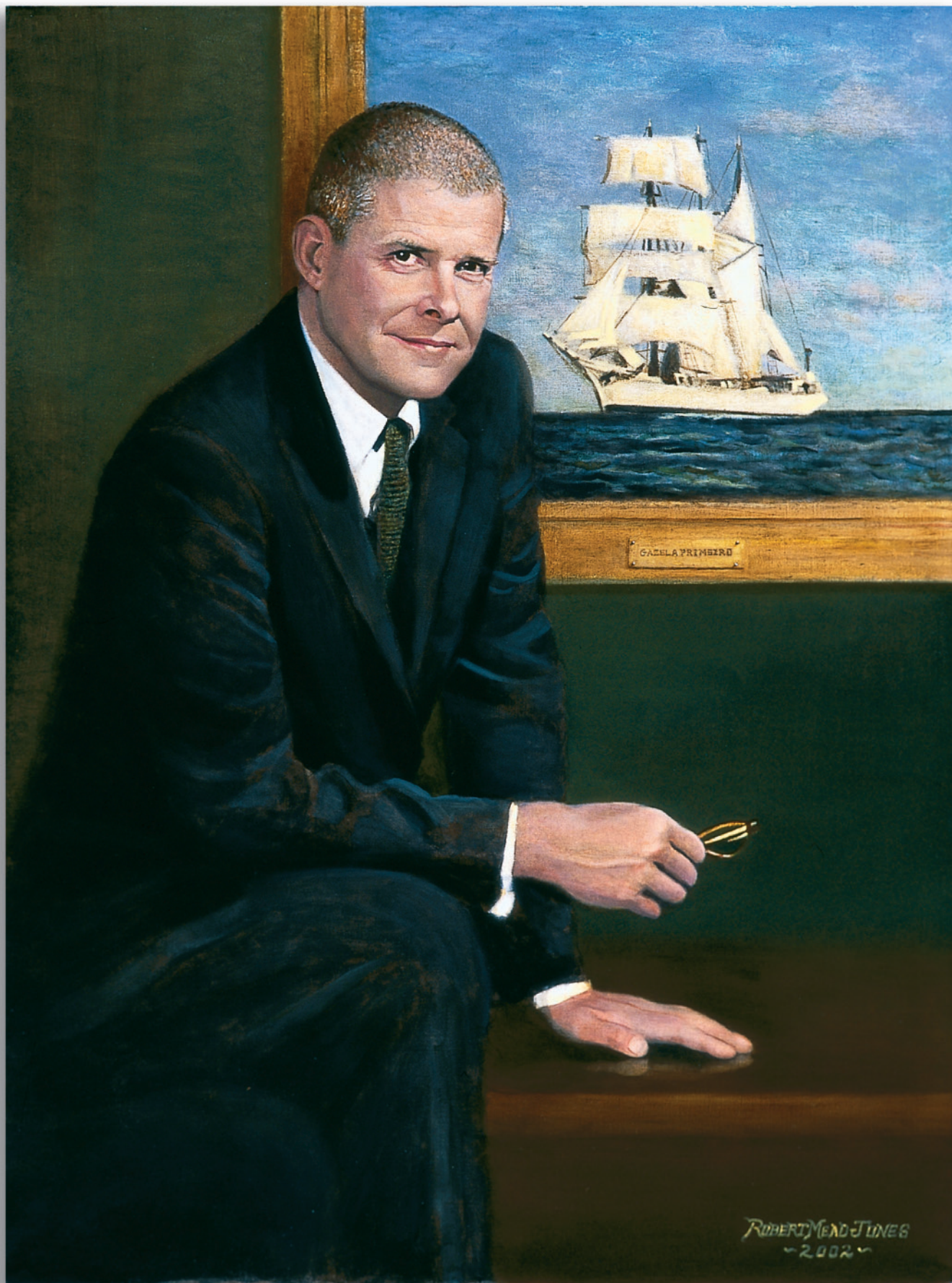
*Smith Trust Scholarship Award Recipient
University of the Arts, Philadelphia
Secret Garden, 2007
Blown and hot worked glass, silk organza
Photo by Ken Yanoviak*

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The **W. W. SMITH**
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WILLIAM WIKOFF SMITH
1919 – 1976



William Wikoff Smith—he embodied ethics, pride and integrity in his work and in making social responsibility a daily commitment throughout his life. Hard work, extraordinary talent and the willingness to take risks brought many successes and accomplishments in his life.

Bill Smith acquired control of Kewanee Oil Company through his great grandfather, Colonel Joseph D. Potts who, with five colleagues associated with the Pennsylvania Railroad, founded the company in 1871. He joined the active management just after World War II, in which he served as a pilot and First Lieutenant in the United States Army Air Corps. In 1948, at the age of 28, Bill Smith was elected Kewanee's fifth president, and in 1973, Chairman of the Board.

Kewanee began as the Enterprise Transit Company and initially operations were in oil transport, but it later concentrated on exploration and production. In November 1908, the Board of Directors of the Enterprise Transit Company created The Kewanee Oil and Gas Company to conduct its oil and gas operations, primarily in the state of Illinois. The directors were meeting in a town called Kewanee, hence the name of the company which means “prairie hen” in Winnebago, the language of the Indians once indigenous to that area.

Bill Smith took control and responsibility for growing the company in a developing and competitive industry. He pursued an ambitious program to acquire oil and gas properties. Foreign operations and exploration started in Canada and the Caribbean. Eventually, Kewanee would drill and produce hydrocarbons in many of the major onshore and offshore petroleum basins around the world as a major independent oil and gas company. Related operations were expanded through the acquisition of Mathiasen's Tanker Industries, Inc., a tankering company hauling Alaska crude oil to the Gulf of Mexico.

Kewanee specialized in secondary recovery processes, predominantly waterflooding, to obtain additional oil from older wells. A particularly successful waterflooding operation was completed in Osage County, Oklahoma. Bill Smith's ingenuity and leadership skills reaped many rewards and honors, but he always retained special pride in one—he was inducted into the Osage Tribe of Indians as an Honorary Chief of the Deer Clan.

By 1975, Kewanee achieved gross revenues in excess of \$357,000,000 through various acquisitions, including the Harshaw Chemical Company, the purchase of a majority interest in the Sound Refining Company, and the acquisition of the Millmaster Onyx Corporation, a specialty chemical company.

Privately, Bill Smith was a quiet man with varied interests—photography, ship model building, and sailing. He was an expert at all three. At the time of his death, he was sponsoring the rebuilding of the brig *The Unicorn*, a 145-foot square rigged sailing vessel which went on to participate in the 1976 Tall Ships Race (finishing 5th, best U.S. entry) and OpSail on July 4th, 1976, New York Harbor.

In 1951, Bill Smith established The W. W. Smith Foundation. Each year, he contributed a substantial number of Kewanee shares to the Foundation. For more than twenty years, the Foundation quietly supported the charitable needs of the Philadelphia community in a significant way.

The Foundation was liquidated by merger into the Philadelphia Maritime Museum (known today as The Independence Seaport Museum) in 1973. Bill Smith was president of the museum from 1972 to 1976 and helped establish it as a Bicentennial Landmark. The Museum has become a valuable asset to the City of Philadelphia. He also personally provided funds to purchase the *Gazela Primeiro*, a Portuguese barkentine now known as *Gazela Philadelphia*. Naturally, he was one of the crew to bring her back to Philadelphia following the route of Christopher Columbus to the Caribbean. *Gazela Philadelphia* is now under the management of the Philadelphia Ship Preservation Guild.

Bill Smith will always be remembered as a quiet, generous friend and an able leader with incredible foresight. He died at the age of 56. In his will, he established an enduring legacy to make significant and lasting contributions that enhance the quality of life for generations to come through the creation of The W. W. Smith Charitable Trust.

REFLECTING ON 30 YEARS OF BUILDING ONE MAN'S DREAM



Mrs. William Wikoff Smith, Trustee

Little did I know how much of an impact building the Smith Trust would have on my life; the pleasure of helping others in need and affording opportunities to those who could discover new cures for diseases have all become a part of my daily routine.

It all started when Bill Smith and his attorney, Wally Randall, drafted Bill's will. Wally worked on creating the Smith Trust, setting up the structure, and bringing it into reality upon Bill's death. Bill Smith's legacy entrusted me with the privilege of serving as Trustee of the Smith Trust. The Trust has been in existence for 30 years and I have had so many happy memorable events as well as sad ones. These last 30 years, building the Trust and seeing it grow has been one of the most rewarding times of my life, only second to raising my daughters.

The mission has always remained the same: to improve the lives of vulnerable people and anticipate some of tomorrow's needs today.

Thinking back to how the Trust got started: we had a little office in a medical building that my husband owned, three people with directed passion to take the vision and dreams of Bill Smith and create the Smith Trust. Those years were challenging and fulfilling.

Bill Powell of the former Philadelphia National Bank, Bill Piercy and I spent many hours discussing how we were going to go about fulfilling Bill Smith's dreams. Part of making this dream become a reality was the sincere kindness of Morrie Dorrance. Morrie allowed his staff to help us organize and develop the operations piece of the Trust. Charlie Humpton was a key player; he worked with me, instructed me, and made sure that it all went the way it should. We all "burned a lot of midnight oil" around my kitchen table in Villanova discussing problems, issues and concerns.

There were so many funny stories and happy times that were shared with the PNB people (which eventually became the CoreStates Group). Everyone at the bank was so kind and helpful. We had monthly investment meetings; the financial analysts would keep us up to date on the investment world. The Grant Administrator, Bill Powell, would do site visits to investigate the grant proposals that had been submitted to the Trust and then report back to the Trustees, Mary Smith and Morrie Dorrance.

REFLECTING ON 30 YEARS OF BUILDING ONE MAN'S DREAM

Some of the other important people who made the Trust what it is today:

- Terry Fritz from the bank: administered the Food, Clothing and Shelter Grants along with the College Scholarships
- Louise Havens, my daughter: Grant Administrator for 25 years overseeing Cancer, Heart and eventually AIDS Research Grants
- Debbie McKenna, my daughter: Advisor for the Trust for 20 years
- Bruce Brown followed Terry: administered the Food, Clothing and Shelter Grants along with the College Scholarships
- Fran Pemberton along with Gloria Massucci followed Bruce, remained with the Trust for 10 years: administered the Food, Clothing and Shelter Grants, the College Scholarships, and manned the office.

The comradery of these people made for a strong and vibrant organization. So many people benefited from their tireless energy. Bruce Brown has kept in touch through the years, just checking in to see how things were going. I cannot thank these people enough for their professionalism, dedication, and for making Bill's dream come true.

Morrie Dorrance and Charlie Humpton have been loyal to the Trust for 30 years and a great support to me. I thank them from the bottom of my heart. There were many people from CoreStates who helped throughout the years. I have fond memories captured in the many photos and funny stories stored in my memory that still make me smile, but more important—visiting the people we have helped through the years has given me the satisfaction of knowing that together we have been able to make Bill Smith's vision a reality.

The present: we now have two excellent employees working with the Trust and I am very proud of them both. Michelle Montgomery, the new Grant Administrator for the Food, Clothing and Shelter Grants and College Scholarships, is quickly adapting to the Trust and doing well. Cathy Probeck has a wonderful command of the computer and is working miracles with tracking all our documentation and running the office.

In closing, it would take writing several volumes of a book to express the appreciation I have for the 30 years of love, hard work and dedication everyone has given to fulfill a Man's Dream. I look forward to continuing to serve as the Trustee and then passing the honor of Trustee to Louise and Debbie in the future.

Mrs. Mary L. Smith

BUILDING ON A VISION; SHARING THE DREAM

IN THE BEGINNING

Charles B. Humpton, Senior VP, PNB; Managing Director, CoreSates Investment Advisors

Charles Humpton, guided by a memo outlining all of the steps needed to be taken, was intimately involved in the creation of the Trust. With assets of \$49,890,000 at the time of its inception, the Trust was one of the five largest in the City of Philadelphia. “We’ve come a long way since then.”

G. Morris Dorrance, President, PNB; President/Chairman of the Board, CoreStates

“I am very proud of the part that PNB played in creating the W. W. Smith Charitable Trust.”



Charles B. Humpton, the Trust’s first Chief Investment Officer, and G. Morris Dorrance, one of the original Trustees

SMITH TRUST REMINISCENCE (IN ORDER OF SUCCESSION)

William A. Powell (Bill)

“I served as staff when the Trust was first begun, and I remember how much the W. W. Smith Charitable Trust meant to the Philadelphia community. The Trust was a burst of energy at a time when medical research, college tuition assistance, and basic human services needed help.”

Charles A. Fritz (Terry)

“Best job I ever had! I really had the feeling the Trust was making a positive difference. Whether it was seeing corners of Philadelphia I had never explored or helping housing or the Food Bank, the situation was never repetitive. Glad to see it’s still in such good hands!”

BUILDING ON A VISION; SHARING THE DREAM

Bruce Brown

“William Wikoff Smith’s proud philanthropic legacy is exemplified as much by how the Trust routinely acts as by the ascending numbers of grants and dollars awarded.

- Clearly focused guidelines, but thoughtful flexibility
- Mandatory pre-award site visits
- Patience with evolving grantees
- Near anonymity despite selective public policy involvements
- Equal attention to investing and grantmaking
- Lean staff and involved Trustees

This recipe manifests and justifies the American tradition and ideal of private sector action for public good.”

Frances Pemberton Tyler (Fran)

“I have fond memories of two organizations: Good Works and Aid For Friends. Both have strong founders and leaders, each with a clear vision of how to help others (Jim Ford–Good Works; Rita Ungaro Schiavone–Aid For Friends). They began as seedling projects, were nurtured, and allowed to grow into valuable and critical resources for their communities. With the support of strong board members, each organization steadily grew with each passing year.”

Michelle Montgomery (Mickey)

“As the new Grant Administrator, I am enjoying working with so many wonderful organizations. The Trust, through its grant programs, addresses the needs of so many people on so many different levels. My goal is to be a good steward of the Trust’s grant funds.”

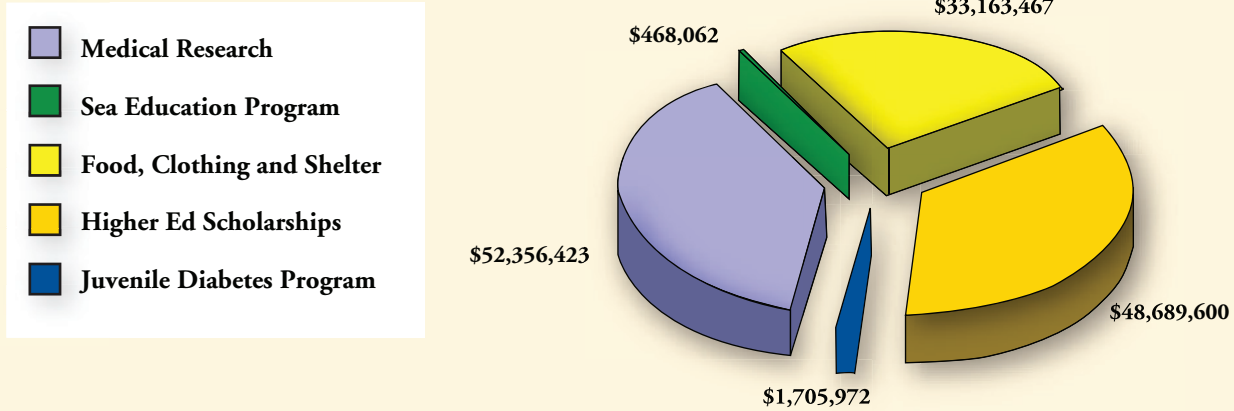


From its inception through the present, some of the people who have played a part in administering the Trust. From left to right: JoAnne Fredericks, Bruce M. Brown, G. Morris Dorrance, Louise A. Havens, Mary L. Smith, Deborah J. McKenna, Charles B. Humpton, Catherine Probeck, Frances Pemberton Tyler, Michelle Montgomery, William A. Powell

GRANTS APPROVED SUMMARY

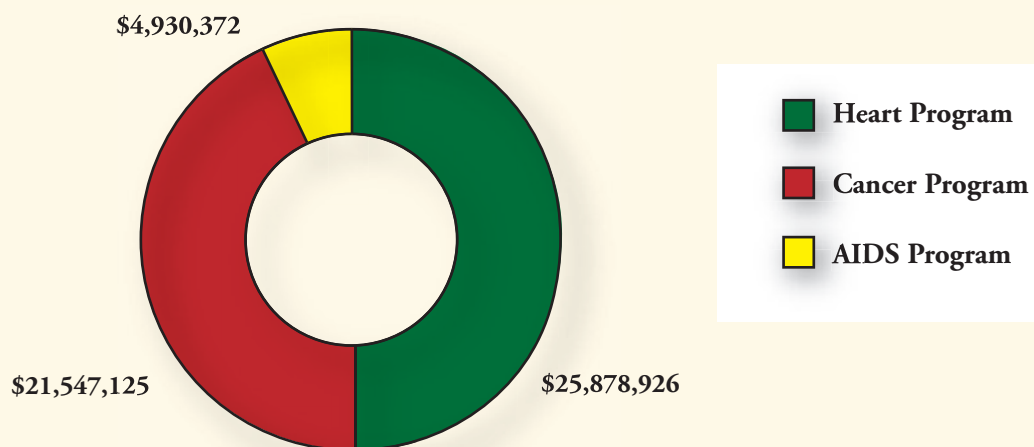
Smith Trust 30 Year Grant History

August 1977 through June 2007



The chart above shows a thirty-year history of grants that are part of the current funding areas through the Smith Charitable Trust. The total number of grants: 3,026 for a total of \$136,383,524.

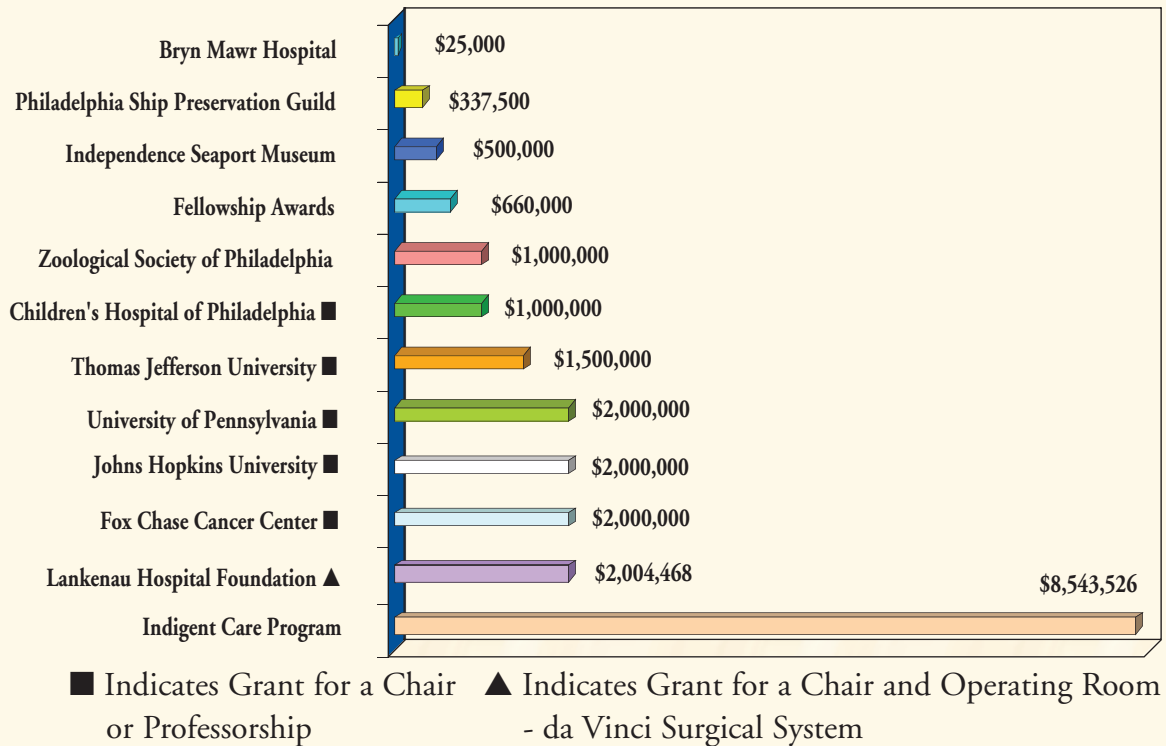
Medical Research Grants



Above is a chart displaying how the Medical Research grants (from the chart above) were distributed; there are 424 grants for this category.

GRANTS APPROVED SUMMARY

30 Years of Special Grants



The chart above illustrates special projects and previously funded areas. The number of Special Grants awarded was 333 for a total of \$21,570,494.

Chairs/Professorships currently held at:

- Children's Hospital of Philadelphia, Chair: Vivian G. Cheung, M.D.
- Thomas Jefferson University, Chair: Walter J. Koch, Ph.D., F.A.H.A.
- University of Pennsylvania, Chair: Jonathan A. Epstein, M.D.
- Johns Hopkins University, Professorship: Daniel B. Drachman, M.D.
- Fox Chase Cancer Center, Chair: Kenneth S. Zaret, Ph.D.
- Lankenau Hospital Foundation, Chair: Peter R. Kowey, M.D.

In looking at the three charts covering all the grants approved over the last thirty years, the complete total is 3,359 grants for \$157,954,018.

REVIEW OF THE PAST TWO YEARS

The past two years have been challenging, energizing and, most of all, rewarding for all involved with the Trust. There is a new level of respect for change and renewal as a natural component of managing the Trust. New staff came on board and the Trust reaffirmed its mission of ensuring basic human needs, supplementing higher education scholarships, and enabling basic medical research in the areas of heart disease, cancer and AIDS. This renewed focus is a reflection of the ideals, creativity and dreams of Bill Smith who, through his legacy of the Trust, planned to encourage young people to excel in all aspects of their lives through education, to advance the application of medical research, and to nurture individuals both young and old to reach for their highest potential.

The Trust has been fortunate to have the benefit of consistent and excellent stewardship at all levels and the prudent counsel of expert outside advisors. Grants of \$16,042,580 were approved during the two year period, bringing the total funding made available since 1977 to \$157,954,018.

Looking at the Food, Clothing and Shelter Program grants over the last two years has been a serendipitous discovery of organizations that have dedicated themselves to helping others. While funding was certainly granted to a few larger organizations, grants were most often to small non-profits that provide one-on-one services for needy children, families or the elderly. Most of the organizations have no claim to fame; they are just ordinary people serving and caring for their neighbors, sometimes in extraordinary ways.

Smith Scholars come from diverse backgrounds, but all have something in common—the skills, determination and leadership abilities to maintain the high academic standards required to achieve their goals, to live their dreams. Today, as over the past two years, Smith Scholars are a thriving part of both their academic and neighborhood communities. Many of our Scholars have become dynamic influences in their professions and their communities.

Medical research continues to expand with each major new discovery and technical innovation. Basic medical research provides the starting point for developing solutions to health problems. For example, medical scientists working in translational research may use a basic discovery about how cancerous cells behave to develop a drug that will block this behavior or reduce its effects. Basic research can also give rise to new research tools and techniques, some of which have medical applications. The Trust is very proud to have funded leading researchers in conducting basic medical research at the forefront of some of the most innovative discoveries of the new century.

The Trustees, advisors and staff of the W. W. Smith Charitable Trust are proud of the good work accomplished by our grantees over the last two years and wish to thank all of those who submitted proposals, recipient organizations, members of the Trust's independent medical advisory committees, and the investment team.

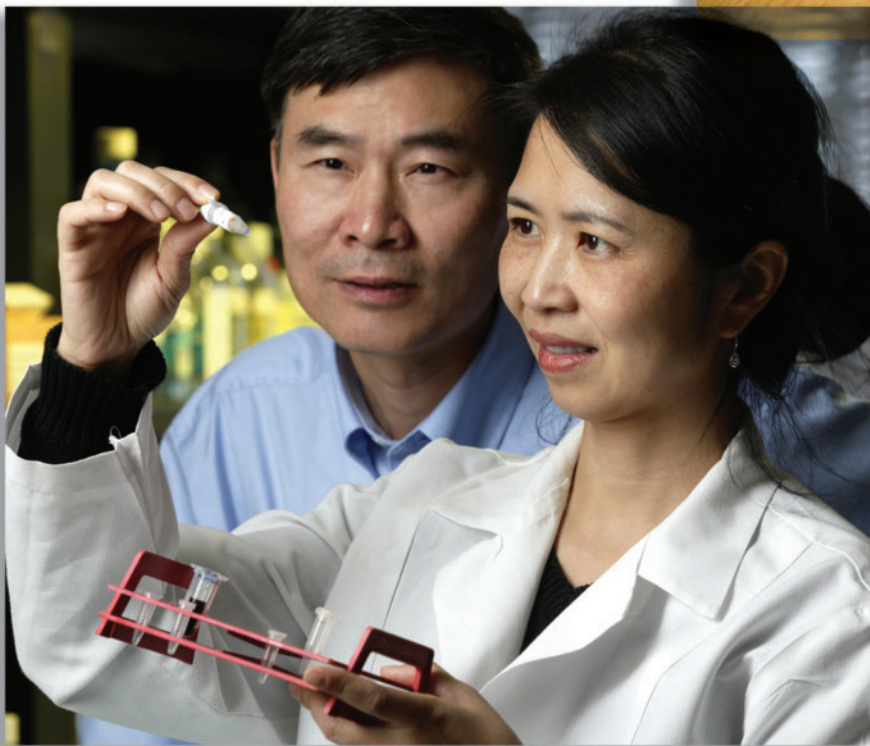
GRANTS



SCHOLARSHIP
FINANCIAL AID PROGRAMS



FOOD, CLOTHING
AND SHELTER FOR
CHILDREN AND
THE ELDERLY



MEDICAL RESEARCH

MEDICAL RESEARCH

Investing in basic medical research is a responsibility that the W. W. Smith Charitable Trust has always taken very seriously. The Trust has historically made, and continues to make, its greatest investments in the area of basic medical research. We seek to identify and fund projects that are unique and meritorious by selecting promising research, which has the potential to attract funding by the National Institutes of Health, or other large funding organizations, as a result of the Trust's start-up support.

Basic medical researchers work at the cellular and molecular level to increase knowledge about processes in the body and other living organisms, including viruses, bacteria and other infectious agents. Their work could, for example, involve identifying for the first time changes in a cell or in DNA that indicate the development of a disease, such as different types of cancer.

The Smith Trust awards are highly competitive. The selection process begins with the nomination by the scholar's institution of its top candidate. To further enhance the effectiveness of research grants, a distinguished medical advisory committee comprised of leading scientists guides the Trustees to fund projects that will hopefully have an immediate and direct influence on the fight against heart disease, cancer and AIDS. Smith Research Scholars represent some of the very best scientists in the medical research arena today. Their talent, creativity and work ethic make them the top producers of groundbreaking science in their field. They continue to make an important contribution to both science and industry.

The Trustees enthusiastically approved a grant of \$1.5 million to the Lankenau Hospital Foundation to establish the William Wikoff Smith Chair in Cardiovascular Research. This grant will fortify the Main Line Health Heart Center's cutting edge cardiovascular basic research, particularly in the areas of arrhythmia and sudden cardiac death, and sustain its expansive clinical research programs. The first holder of the William Wikoff Smith Chair, Peter R. Kowey, M.D., has pioneered basic and clinical cardiovascular research, earning international recognition for his work in both cardiology and electrophysiology.

Nianli Sang, M.D., Ph.D., a scientist at Thomas Jefferson University, is one of the researchers who received a grant from the Trust in the past two years. His grant has enabled him to continue his research into novel ways to block HIF-1 (a factor that is instrumental in determining the supply of oxygen and nutrients to healthy tissues as well as tumors) in malignant tumors without detrimentally affecting other organs most vulnerable to a decreased supply of oxygen and nutrients, such as the heart and brain. Dr. Sang is hopeful that one day his research will lead to a new generation of drugs that kill cancer but produce few side effects.

The philosophy of the Trust is not to compete with government funding organizations, but to identify and fund projects that are unique and meritorious, and which would attract NIH or other large funding organizations in the aftermath of our support.

MEDICAL RESEARCH



Researchers at Fox Chase Cancer Center

Recently, a promising new HIV vaccine created at The Wistar Institute has received funding for clinical development aimed at moving the vaccine into human clinical trials as soon as possible.

Hildegund Ertl, M.D., a former Smith Trust Research Scholar researching “Mucosal Vaccines to HIV-1”, received \$13.3 million in funding over five years from NIH for this project. Dr. Ertl is director of The Wistar Institute Vaccine Center, as well as professor and Immunology Program leader at the Institute. Her work has shown that the vaccine she is testing produces a stronger immune response to the virus and has unique immunological advantages over other vaccines currently being tested for HIV. The vaccine induced a vigorous immune response in monkeys, and we are hopeful it will do the same in humans.

It is impossible to quantify exactly how much progress has been made through basic medical research. The Trust continues to hope for new scientific discovery and stands by its tradition to maintain its greatest investment in medical research.

Number of Grants: 37

Low and High Dollar Amounts: \$48,000 to \$387,000

RESEARCH GRANT APPLICATION GUIDELINES

1. Request from the Trust office, and use, a copy of the required application form (the “red book”). The application form may be copied or recreated by the institution/researcher for ease of use.
2. Review and adhere to Trust policies and application guidelines on pages 38, 39 and 40.
3. Grantees must divulge all outside sources of funding (current and pending), whether Federal, State or private.
4. The Trust will allow and includes a maximum of 10% indirect costs or overhead in any grant proposal funded.
5. Post-award, lay-language, narrative progress and detailed financial reports are required to be submitted at least every six months.
6. Requests for funds to support students, fellows and postdoctoral candidates must be supported by a curriculum vitae for such individuals.
7. Duplicates of the W.W. Smith grant proposal to other sources must be acknowledged within the W.W. Smith Trust application.
8. No funds are awarded solely for equipment. Employ the use of matching funds from the applicant’s institution when support for equipment purchase is requested.
9. Contingent funding approvals may be made. i.e., Trust funds may be reserved until the status of duplicate or related grant proposals is known.
10. Applications must be for the work of individual investigators and not for the general work of research centers.
11. All applications must include a lay summary to inform the Trustees about the objectives of the research and its possible future applicability to a clinical setting.
12. No more than one application per institution is to be submitted in each of the three research fields annually.
13. Every proposal must be submitted to the Trust with a letter of endorsement from the institution's senior official for the research function. Unendorsed protocols or proposals not following the Trust's research application form will not be considered.



HEART, CANCER AND AIDS RESEARCH

HEART RESEARCH

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
AMERICAN HEART ASSOCIATION "Control of Lung Vascular Development by Prx1"	\$100,000		TEMPLE UNIVERSITY "Reciprocal eNOS Regulation by Protease-Activated Receptor 1 and 2"		387,000
JOHNS HOPKINS UNIVERSITY "Heart Disease in Obesity-Leptin and Beta-3 in the Heart"	308,000		THOMAS JEFFERSON UNIVERSITY "Inhibition of Gq Signaling as an Antihypertensive Therapy"	200,000	
JOHNS HOPKINS UNIVERSITY "Multimodality Stem Cell Imaging"		\$219,000	THOMAS JEFFERSON UNIVERSITY "Caveolins in Heart Disease"		300,000
LANKENAU HOSPITAL "RhoB directed SMC Growth and Atherosclerotic Lesion Formation"	295,000		UNIVERSITY OF PENNSYLVANIA "Arrhythmia Mechanisms in a Mouse Model of Naxos Disease"	171,000	
LANKENAU INSTITUTE FOR MEDICAL RESEARCH "Regulation of Calcium Channel Expression in Hypertension by Truncated Subunits"		293,000	UNIVERSITY OF PENNSYLVANIA "Regulation of Heart Development by Protein Arginylation"		360,000
MILTON S. HERSHEY MEDICAL CENTER "Targeting Sphingosine Kinase in Atherosclerosis"		206,000	WISTAR INSTITUTE "Endothelial Cell Senescence and Coronary Artery Disease"	82,408	
			TOTAL HEART RESEARCH	\$1,156,408	\$1,765,000

The W. W. SMITH
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HEART, CANCER AND AIDS RESEARCH

CANCER RESEARCH

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
THE CHILDREN'S HOSPITAL OF PHILADELPHIA "Interactions of IL-7R and mTOR Signaling in Pre-B ALL"		\$74,000	MILTON S. HERSHEY MEDICAL CENTER "DNA Polymerases and the Efficacy of Gemciabine Chemotherapy"		48,000
DREXEL UNIVERSITY "Role of Transcription Factor SP 1 DNA Damage Response"		83,000	TEMPLE UNIVERSITY "Obesity and Breast Cancer Development Role of Leptin"	189,000	
DREXEL UNIVERSITY "Roles of the Timeless-Tipin Complex in Genomic Integrity and Cancer"		116,000	TEMPLE UNIVERSITY "Gadd 45 Genes in Breast Carcinogenesis"		195,000
FOX CHASE CANCER CENTER "3D Matrix Cultures for Better Anti-Metastatic Drug Screening"	\$167,000		THOMAS JEFFERSON UNIVERSITY "Dissect the Novel Pathways That Regulate HIF-1 Function"	177,000	
FOX CHASE CANCER CENTER "Structural Determinants of Receptor Assembly in Bone Metastases"		202,000	UMDNJ, NEW JERSEY'S UNIVERSITY OF THE HEALTH SCIENCES "Tumor Suppressor Function for Cyclin C-Cdk8"		315,000
JOHNS HOPKINS UNIVERSITY "HCC Prevention by Immunologic Control of Hepatitis C"	220,000		UNIVERSITY OF PENNSYLVANIA "Suppression of IgH Translocations by Histone H2AX"	120,000	
JOHNS HOPKINS UNIVERSITY "Profile Cancer Development Using Cell Adhesion Chips"		100,000	UNIVERSITY OF PENNSYLVANIA "The Function of Tribbles Homologue 2 (Trb2) in AML"		58,000
JOHNS HOPKINS UNIVERSITY "Validating Cyclin-Dependent Kinases as Anti-Cancer Targets"		70,000	WISTAR INSTITUTE "Mechanisms Regulating Cerebellum Development and Medulloblastoma"	160,000	
MILTON S. HERSHEY MEDICAL CENTER "Biomarkers of Colorectal Cancer in Inflammatory Bowel Disease"		81,000	WISTAR INSTITUTE "The Role of K12-SECTM1 and Apoptosis"		68,000
			TOTAL CANCER RESEARCH \$1,033,000 \$1,410,000		



HEART, CANCER AND AIDS RESEARCH

AIDS RESEARCH

	FISCAL 05/06	FISCAL 06/07
DREXEL UNIVERSITY "HIV-1 Subtype C Neurotropism and Neurovirulence"		\$88,000
JOHNS HOPKINS UNIVERSITY "Preventing the Next HIV Epidemic: Establishing a Sentinel Surveillance System to Monitor Retrovirus Emergence in Africa"	\$188,000	
MILTON S. HERSHEY MEDICAL CENTER "The Nuclease Activites of Retroviral Integrase"	145,000	
THOMAS JEFFERSON UNIVERSITY "Cellular Anti-Cancer Barrier and AIDS Associated Cancer"		85,000
UNIVERSITY OF PENNSYLVANIA "Modulation of HIV-Specific Immunity During Acute and Chronic Infection"	183,000	
UNIVERSITY OF PENNSYLVANIA "Interleukin-17-Producing CD4+ T Cells in the Immunopathogenesis of AIDS"		116,000
UNIVERSITY OF PENNSYLVANIA "Regulatory and Effector T Cells in HIV/HCV Coinfection"		55,000
TOTAL AIDS RESEARCH	\$516,000	\$344,000
TOTAL RESEARCH	\$2,705,408	\$3,519,000



SCHOLARSHIP FINANCIAL AID PROGRAM

During his lifetime, William Wikoff Smith had a strong belief and a consistent interest in education. The W. W. Smith Charitable Trust has continued to support his view that education is a commitment to lifelong learning and personal growth. It is through the scholarship financial aid program that the Trust reaches out to help students expand their opportunities for self-fulfillment.

Grants are made to full-time undergraduate students at 30 local MSCHE accredited colleges and universities located in Bucks, Chester, Delaware, Montgomery and Philadelphia counties. Scholarships are to supplement existing levels of aid for lower income and middle income students who would not otherwise be able to attend a university or college.

In the Scholars Program, the institution's tuition, the number of students attending the institution, and the percentage of students on financial aid determine the size of the Trust's grant to each institution. Since the Scholars Program is by invitation only, all institutions are monitored to make sure that they continue to comply with all stewardship and reporting requirements.

Scholars Program student recipients are chosen by the individual institutions based upon the Trust's guidelines. Students are required to be permanent residents of Bucks, Chester, Delaware, Montgomery or Philadelphia counties, or the City of Camden, New Jersey. Out-of-state students (with the exception of the City of Camden, New Jersey) who gain residency status due to university/college enrollment are not eligible for funding. The award to individual students is \$2,000 to \$2,500 to be determined by the institution's financial aid office. The Trustees encourage renewal of scholarship aid for more than one year, as long as the student continues to meet all of the Trust's requirements.

Complementing the Smith Scholars Program is the W. W. Smith Scholarship Prize Program. Sixteen institutions out of the larger group that have been previously chosen by the Trustees participate in this program. Prize award winners are students who are part of the overall Scholarship Program and who have been judged to possess high personal character, have achieved academic distinction, have shown involvement in extracurricular or community activities and have evidenced leadership skills. They are honored with a \$5,000 award for their senior year, which may be combined with a Smith Scholars Program grant depending upon the student's financial aid package and the policy of the institution.

GLIMPSES INTO THE SUCCESS STORIES OF THREE PAST SMITH TRUST SCHOLARS



Karen Hollis

Karen Hollis (Cheyney University, Class of 1985, B.S. – Special Education) began her teaching career in 1985 and in 1990-1992 was a vocational trainer for JEVS (Jewish Employment & Vocational Services), a W. W. Smith Trust Food, Clothing and Shelter grant recipient.

Since 2003, she has been employed by Domestic Abuse Project of Delaware County, a W. W. Smith Trust Food, Clothing and Shelter grant recipient, and has managed their emergency shelter since 2006. Her responsibilities as shelter manager include facility management and supervision of all shelter staff/volunteers as well as providing counseling and other client services. Karen's educational and career path exemplify Smith Trust grants coming full circle and benefiting the community as a whole in unexpected ways.

SCHOLARSHIP FINANCIAL AID PROGRAM

Major William J. Collins, Jr., U.S.M.C., J.D. (La Salle University, Class of 1989, B.A. – Political Science, W. W. Smith Scholarship Prize 1988-1989 academic year) began his legal studies in 1991 at Widener University School of Law, graduating in 1994 with a Juris Doctorate Degree. He began his career as a military officer in August 1992 and on August 1, 2001 was promoted to his current rank of Major.

In reflecting on his experience as a W. W. Smith Scholarship Prize recipient, Major Collins recently wrote: “The W. W. Smith Scholarship Prize has meant a lot to me over the years. The first and most obvious is the financial benefit it brings. The scholarship prize was awarded for my senior year and covered more than half of my tuition for that year. This allowed me to both reduce my student loan package and the number of working hours during the academic year. In turn, I achieved my first 4.0 semester...



Major William J. Collins, Jr., U.S.M.C., J.D.

The scholarship prize has greater meaning to me, however, than simply money...To think people at my university selected me from among many other qualified candidates filled me with honor, awe and even trepidation; for to those whom much is given, much will be expected. While I was always proud of my campus and community involvement, knowing others were aware of it and saw me as not only involved but as a leader caused me to ask am I doing enough, can I do more if I am leading, where am I going?...I am now preparing to return to Iraq to work with their Ministry of the Interior to help reconstitute their police force in Al Anbar province and re-establish a system of law and order based on justice. The ripples of Mr. Bill Smith’s generosity and philanthropy are breaking on the shores of countries far away from the Philadelphia institutions he set out to help.”



Niki Cousineau

Niki Cousineau (University of the Arts School of Dance, Class of 1992, B.F.A. – Dance, W. W. Smith Scholarship 1990-1991 and 1991-1992 academic years) is a Philadelphia based choreographer and dancer. Niki has received nine grants to create new work from the Pew Charitable Trust’s Dance Advance and numerous fellowships for choreography from the Pennsylvania Council on the Arts and the Independence Foundation. She is a Pew Fellowship Finalist and was a 2006 Alpert Award nominee.

Together with her husband Jorge, she founded the performing arts group Subcircle in 1998. The company has worked with numerous recognized dancers, choreographers and composers. Their work has been performed throughout Germany, where they participated in the Body and Landscape Residency at the International Theater Research Center Schloss Broellin. In Philadelphia, they have been presented in DanceBoom, the New Festival, Philadelphia Fringe Festival, and in Brat Productions’ series Causeway. In fall 2006, they presented a new installation piece STILL UNKNOWN, which was commissioned by the Live Arts Festival.

The wisdom and importance of accumulated knowledge continues to be clear with each passing year. The Trustees remain ever committed and proud of the Smith Scholars.

Number of Grants: 100

Low and High Dollar Amounts: \$3,450 to \$218,000

SCHOLARSHIP FINANCIAL AID PROGRAM

SCHOLARS PROGRAM

	FISCAL 05/06	FISCAL 06/07
Arcadia University	\$ 83,000	\$ 66,000
Bryn Mawr College	71,000	53,000
Cabrini College	78,000	64,000
Chestnut Hill College	69,000	59,000
Cheyney University	54,000	44,000
Delaware Valley College	75,000	60,000
Drexel University	144,000	119,000
Eastern University	78,000	61,000
Gwynedd-Mercy College	68,000	56,000
Haverford College	71,000	52,000
Holy Family University	67,000	53,000
Immaculata University	65,000	53,000
LaSalle University	97,000	74,000
Moore College of Art & Design	66,000	54,000
Neumann College	74,000	56,000
Peirce College	44,000	40,000
Penn State Delaware County	57,000	46,000
Philadelphia Biblical University	60,000	51,000
Philadelphia University	83,000	67,000
Rosemont College	65,000	52,000
Saint Joseph's University	98,000	77,000
Swarthmore College	72,000	53,000
Temple University	218,000	193,000
The University of the Arts	82,000	65,000
University of Pennsylvania	148,000	105,000
University of the Sciences in Philadelphia	85,000	62,000
Ursinus College	85,000	67,000
Villanova University	114,000	82,000
West Chester University	118,000	88,000
Widener University	85,000	63,000
TOTAL	\$2,574,000	\$2,035,000

SCHOLARSHIP FINANCIAL AID PROGRAM

PRIZE PROGRAM

	FISCAL 05/06	FISCAL 06/07
Bryn Mawr College	\$ 10,000	\$ 10,000
Chestnut Hill College	10,000	10,000
Delaware Valley College	10,000	10,000
Drexel University	10,000	10,000
Haverford College	10,000	10,000
La Salle University	10,000	10,000
Philadelphia University	10,000	10,000
Saint Joseph's University	10,000	10,000
Temple University	10,000	10,000
The University of the Arts	10,000	10,000
University of Pennsylvania	10,000	10,000
University of the Sciences in Philadelphia	10,000	10,000
Ursinus College	10,000	10,000
Villanova University	10,000	10,000
West Chester University	10,000	10,000
Widener University	10,000	10,000
TOTAL	\$160,000	\$160,000

ONE-TIME SPECIAL SCHOLARSHIP

	FISCAL 05/06	FISCAL 06/07
Pennsylvania Academy of the Fine Arts		\$25,000

SEA EDUCATION PROGRAM

	# OF GRANTS	FISCAL 05/06	FISCAL 06/07
Drexel University	4	\$22,632	\$19,085
University of Pennsylvania	3	\$12,800	\$13,750
TOTAL		\$35,432	\$32,835

GRAND TOTAL	\$2,769,432	\$2,252,835
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FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

When we think of the future, there is no question that families with children are a very special and precious resource. They represent our nation's future. Equally special and precious are our senior citizens. Their guidance, support and experience are an essential resource if families with children are to have the opportunity to reach their potential and meet life's challenges head on.

The Trustees believe that meeting the challenges of both young and old through the direct provision of food, clothing and shelter, which are the basic necessities required to sustain life, will help families, children and the elderly combat the disabling forces that can bring despair, helplessness and destruction to our communities.

For three decades, the Trust has funded projects and programs of non-profit organizations from the five-county area and the City of Camden, New Jersey. The Trust staff and Trustees find the extent of needs to be wide and varied. We look to fund organizations that offer innovative, smart and dynamic approaches to solving community problems. The stories shared here provide a picture of some of the ways W. W. Smith Charitable Trust grantees apply their creativity and commitment to make a better life for children, families and the elderly.

HMS School for Children with Cerebral Palsy was established as Home of the Merciful Savior for Crippled Children in 1882 to serve the needs of children with all types of physically disabling conditions. Today, HSM is the only school in Pennsylvania that exclusively serves children and youth with severe disabilities resulting from cerebral palsy, some of whom may also have other disabilities resulting from brain injury. The mission of HMS School is to educate, nurture and care for these individuals with the goal of assisting each in achieving his or her maximum potential. In alignment with the school's plan to greatly increase their ability to meet the needs of their students today and into the future, the Smith Trust was able to fund a ceiling mounted lift system that enables all students to be moved safely within the residential area with no injuries to either the staff or the students. Due to the complex medical conditions of the students, their bones are more fragile and the lifts significantly contribute to their safety. Since some of the student population is older and heavier, the lift systems are also necessary so that the staff can safely transfer the students between their beds, their wheelchairs, and bathroom facilities.

Aid For Friends is an organization that started with one person's passion to help poor elderly homebound in Philadelphia. Founded in 1974 by Rita Ungaro-Schiavone in response to the nutritional and social needs of this population, Aid For Friends is truly a grassroots non-profit. Its purpose was to provide nutrition, provide socialization, and prevent institutionalization. Just last year, Aid For Friends delivered 460,740 home-cooked dinners to 2,194 shut-ins in the five county Greater Philadelphia Region. It is estimated that approximately 16,600 people volunteer their time to make meals, deliver meals, and visit the homebound each week. Over their 32 year history, they have delivered more than 13.5 million free meals. The Smith Trust has a long history with Aid For Friends and has funded the purchase of food and necessary kitchen equipment for food preparation.

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

Baptist Children's Services, founded in 1879, provides the very best in residential care to roughly 450 abused and neglected children ages 8-18 through five group homes and two emergency shelters in Philadelphia and Montgomery Counties. Joseph Jones, who recently graduated from Parkway West High School, is a resident of the Logan Home, part of Baptist Children's Services. This proud young man's graduation suit was among the clothing items purchased with funds from their 2007 W. W. Smith grant. Joe is a National Merit Scholar of Parkway West High School and will attend Penn State's Main Campus on full scholarship in the fall of 2007. We are proud to have contributed in helping make Joe's great success an even happier occasion.

In the fourth grade, Loretta Claiborne was let out of school early to avoid being ridiculed by other students. She had tried out for the track team, but was not allowed to participate due to her disabilities. She had few friends and fewer opportunities to lead a full life. Her family was extremely poor; she came to a Special Olympics competition to receive a free lunch and a t-shirt. Loretta has evolved into a world-class runner. She has finished twice in the top 100 female runners in the Boston Marathon, has appeared three times on Oprah, and inspired the Walt Disney movie "The Loretta Claiborne Story." The W. W. Smith Trust is honored to have provided grants supporting the purchase of food for Special Olympic Athletes over the past years.

The Trustees continue to believe in the mission of this program: to provide support to the organizations that are always there for the children, families and the elderly who need them the most.

Number of Grants: 134

Low and High Dollar Amounts: \$1,500 to \$100,000

Rita Ungaro-Schiavone, founder of Aid For Friends, has almost finished writing her new book, Please Remember Me. "I called the homebound frail elderly 'client friends' 33 years ago because they needed food and friendship.



It was exciting to discover how our faith and energies and resources could be channeled into free services to the needy, hungry, disabled and frail elderly. And they are hungry, sick and disabled in so many ways! The stories they tell me for my book each day are tales of courage and inspiration."



FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY



Loretta Claiborne's life is a tribute to the good that can come from an organization caring about children. Special Olympics helped Loretta realize her potential and reach for success. Accomplishments: Chairperson, Global Athlete Congress (2000-2005); Runners World Special Athlete of Quarter Century; Member of Women in Sports Hall of Fame; Special Olympics International Hall of Fame; World Games Gold Medalist—Half Marathon (1991, 1999) Bowling (1995) and 3000 Meters (2003); 1996 ESPY—Arthur Ashe Award for Courage.



Joseph Jones, a resident at Baptist Children's Services' Logan Home, shows off his new suit and his National Merit Scholar Award during graduation ceremonies at Parkway West High School.



Natalie Clemens, a student at HMS School, is lifted with assistance from Physical Therapist Mary DeLuca (left) and Therapy Aide Linda Table (right) using the Sure-Hands portable version of the ceiling-mounted lift system to be installed in the school's dormitory rooms and bathrooms. The new ceiling lift system is being supported with a grant from the W. W. Smith Charitable Trust.

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
<p>ACHIEVEABILITY To support housing renovation and their Family Self Sufficiency Program</p>	\$25,000		<p>BEBASHI (BLACKS EDUCATING BLACKS ABOUT SEXUAL HEALTH ISSUES) To provide funding to purchase non-perishable food and food certificates for distribution to Philadelphia area low-income families with children, where one or more is infected with HIV/AIDS</p>	10,000	
<p>AHEC (AREA HEALTH EDUCATION CENTERS) To support the delivery of emergency food, clothing and shelter needs for low-income families with children, the elderly and transient youth in Camden</p>	25,000		<p>BETHESDA PROJECT To support critical restorations and upgrades of seven worn and aging bathrooms at two Bethesda facilities: My Brother's House and Bethesda Sanctuary</p>	30,000	
<p>ENERGY COORDINATING AGENCY OF PHILADELPHIA, INC. To support the Emergency Food Fund Program (EFFP) for low-income families with children, the elderly and transient youth in Camden</p>		\$20,000	<p>BRIAN'S HOUSE, INC. To provide funding for clothing, furnishings and repair of their structure</p>	15,000	
<p>AIDS COALITION OF SOUTHERN NEW JERSEY To support their Food Bank, which provides home delivered meals for families, children and the elderly affected by AIDS</p>	40,000		<p>BUCKS COUNTY HOUSING GROUP, INC. To provide funding for mattress and box spring sets for their five shelter sites plus furniture replacement for six apartments at the Robert Morris Shelter</p>		34,070
<p>BAPTIST CHILDREN'S SERVICES To support the cost of clothing and shoes for at risk children and youth living in group homes and the emergency shelter, who otherwise would be homeless</p>	15,000		<p>CAMPBILL VILLAGE KIMBERTON HILLS, INC. To support the Aging in Community Program - a supportive residential environment for aging community members with special needs</p>		25,000
<p>To support the cost of clothing and shoes for at risk children and youth living in group homes and the emergency shelter, who otherwise would be homeless</p>		20,000	<p>CARIE (COALITION OF ADVOCATES FOR THE RIGHTS OF THE INFIRM ELDERLY) To support the Elderly Victim's Emergency Security Fund (EVESF) for needed home repairs to secure the homes of vulnerable elderly individuals who are victims of family violence or crime in their community</p>	7,500	
<p>BARCLAY FRIENDS, INC. To support the Resident Assistance Fund for elderly residents who can no longer cover the cost of their own care</p>	20,000		<p>To support the Elderly Victim's Emergency Security Fund (EVESF) for needed home repairs to secure the homes of vulnerable elderly individuals who are victims of family violence or crime in their community</p>		7,500
<p>To provide funding for food service department renovations: replacing food service equipment in poor condition and floor tiling in the kitchen and dish rooms</p>		41,000			

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
THE CAREER WARDROBE To purchase appropriate, special size, professional clothing for low income women returning to the workforce		\$10,000	CHESTER COUNTY CARES To provide food for low-income families with children and the elderly in Chester County	15,000	
CATHEDRAL KITCHEN To purchase new kitchen equipment and furnishings for new facilities		75,000	CHILD ABUSE PREVENTION EFFORT To provide emergency items ranging from clothing and bedding to appliances for families in crisis	25,000	
Challenge Grant to purchase new kitchen equipment and furnishings for new facilities		25,000	CHRIST'S HOME To help cover the cost of food, liquid supplements, incontinence products, personal grooming items, and supplies for activities for residents who no longer have sufficient funds	35,000	
CATHOLIC SOCIAL SERVICES (MERCY HOSPICE) To replace damaged flooring, refrigerator, security lighting and windows as well as to address basic furniture needs for the residence		40,000	To help cover the cost of food, liquid supplements, incontinence products, personal grooming items, and supplies for activities for residents who no longer have sufficient funds		20,000
CENTER FOR THE BLIND AND VISUALLY IMPAIRED To support the Seniors Program for low-income elderly	\$10,000		Challenge Grant to help cover the cost of food, liquid supplements, incontinence products, personal grooming items, and supplies for activities for residents who no longer have sufficient funds		10,000
CENTER IN THE PARK To support programs that provide for emergency expenses and food for low-income older adults		15,000	CHURCH OF THE ADVOCATE To support the Soup Kitchen, which provides hot meals for very low-income families, children and elderly in North Philadelphia	15,000	
CHESTER COMMUNITY IMPROVEMENT PROJECT To support The East End Initiative to enable the organization to purchase and restore vacant property in the City of Chester, which also provides skilled training for Youth Build students who assist with property renovations	50,000		To support renovation of their Soup Kitchen		10,000

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
CIRCLE OF CARE To support the Fund for Families, which provides basic needs assistance to HIV/AIDS affected families	\$20,000		DIGNITY HOUSING To support the renovation of four housing units in Phase II of the Northwest Restoration Project	43,500	
COMMUNITY CARE CENTER OF THE NORTHEAST To renovate the kitchen, purchase additional equipment, and form an emergency food bank to serve families who find themselves without basic food staples such as milk, bread and cereal, etc.		\$30,000	DIVERSIFIED COMMUNITY SERVICES To help 40-50 low-income families avoid mortgage foreclosure by refinancing usury-type loans	30,000	
Challenge Grant to renovate the kitchen, purchase additional equipment, and form an emergency food bank to serve families who find themselves without basic food staples such as milk, bread and cereal, etc.		10,000	THE DOMESTIC ABUSE PROJECT OF DELAWARE COUNTY, INC. To replace furniture in the community room and perform maintenance and repairs throughout the shelter, such as the toilet door, lock and security system repairs and electrical work	7,500	
THE COMMUNITY COALITION \$5,000 to Open Hearth for affordable rental housing; \$10,000 to Orion Communities' Community Account; and \$5,000 to Sheltering Arms for their food program	20,000		THE DOMESTIC VIOLENCE CENTER OF CHESTER COUNTY To improve the safety of their on-site Emergency Shelter and Transitional Housing facilities		20,000
COMMUNITY HEALTH & EDUCATION OUTREACH (CHEO) To provide relief in the form of food vouchers, shelter and clothing costs for the elderly and families with dependent children		5,000	DRUEDING CENTER (PROJECT RAINBOW) To provide funding to renovate the first floor kitchen and stair tower, replace windows, upgrade railings and replace the boiler room door of their 78-year old residential building		50,000
DEVELOPMENTAL ENTERPRISES CORPORATION To support the cost of fire escape restoration at 26 West Mt. Kirk Avenue, which serves five developmentally disabled individuals	5,000		ELDERNET To provide funding for their ESSLM/emergency fund that serves needy people of all ages who are in danger of losing their homes and becoming displaced		5,000
To support the cost of footings and installation of steel fire escape at 2727 Woodland Avenue		5,000	Challenge Grant to provide funding for their ESSLM/emergency fund that serves needy people of all ages who are in danger of losing their homes and becoming displaced		1,500

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
ELWYN To replace flooring and cover cinder block walls at Valley View, an assisted living residence for deaf elderly		\$45,000	FRIENDS HOME To support renovations for the nurses station and kitchen repairs for the residential home for low-income elderly in Kennett Square	45,000	
ENERGY COORDINATING AGENCY OF PHILADELPHIA, INC. To provide housing to low-income seniors by helping eliminate the threat of displacement of Grey's Ferry neighborhood residents by reducing gentrification	\$30,000		To support the Dietary Program that provides three meals a day to elderly residents with limited finances		75,000
EPISCOPAL COMMUNITY SERVICES To provide families with safe housing, three healthy meals and two snacks daily		10,000	GOLDEN SLIPPER CENTER FOR SENIORS To support their food program that provides breakfast, congregate lunch, supplemental meals, homebound meals and distribution of non-perishable foods		15,000
Challenge Grant to provide families with safe housing, three healthy meals and two snacks daily	5,000		Challenge Grant to support their food program that provides breakfast, congregate lunch, supplemental meals, homebound meals and distribution of non-perishable foods		2,500
FACE TO FACE To support St. Vincent's Dining Room meals for low-income elderly and mentally ill persons		30,000	GOOD WORKS, INC. To support the renovation of nine homes by providing for the cost of building materials and supplies	30,000	
FEDERATION EARLY LEARNING CENTER To support interior renovations of the Little Schoolhouse of the Lassin Center	54,597		To support their Neighbors Helping Neighbors Project to cover the cost of building materials and supplies to repair the homes of low-income families and elderly in the Coatesville, West Chester and Phoenixville areas of Chester County		30,000
Challenge Grant to support interior renovations of the Little Schoolhouse of the Lassin Center		30,000	GREATER DELIVERANCE DEVELOPMENT OUTREACH, INC. To support renovation of the food co-op building so that it can provide a greater selection of goods and serve a higher number of low-income seniors and families with children	10,000	
FIRST UNITED METHODIST CHURCH OF GERMANTOWN To purchase food for low-income students from Germantown High School who attend their programs		8,000	HABITAT FOR HUMANITY IN THE DELAWARE VALLEY To increase the production of homes for families in need by supporting the direct costs of construction and housing materials for 42 houses		100,000
THE FOOD TRUST (READING TERMINAL FARMERS' MARKET TRUST) To provide nutritious fruit and vegetable snacks for the Kindergarten Initiative		20,000			

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
HAYES MANOR					
To cover the direct cost of purchasing and installing a new elevator in the main residence for low-income elderly	\$50,000		JEWISH FAMILY & CHILDREN'S SERVICES		
			To support the City Line Aging Support Project, which delivers healthy kosher meals to homebound elderly		10,000
HMS SCHOOL FOR CHILDREN WITH CEREBRAL PALSY			LIFE CENTER		
To support the purchase and installation of a ceiling lift transport system for their residential handicapped children		\$75,000	To support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends	10,000	
INN DWELLING			Challenge Grant to support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends	5,000	
To support renovations to the house located at 434 E. Chelten Avenue and to provide one-time grants to needy families	18,176		To support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends		10,000
INTERFAITH HOSPITALITY NETWORK OF THE MAIN LINE			Challenge Grant to support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends	4,000	
To cover structural improvements, repairs and renovations to their care center for the safety of clients, guests and staff	10,000		To support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends		10,000
INTER-FAITH HOUSING ALLIANCE			Challenge Grant to support the Sunday Dinner with Friends and daily meals programs addressing problems of older residents suffering from mental and/or physical limitations, some living alone due to the death of a spouse and/or the natural separation from friends		4,000
To support repairs and improvements to Hope Gardens in Ambler, Pa., including roofing repairs, installation of a common bathroom, updating apartment shower controls, and replacing apartment stoves		44,000			
JCCs OF GREATER PHILADELPHIA					
To provide for the purchase of food for home delivered kosher meals through the Cook for a Friend/Kosher Home Delivered Meals program and to purchase supplemental frozen meals	19,000				
JEVS			MANNA		
To establish an emergency fund to assist in defraying a wide range of essential costs that some of their families, residing in Logan and West Kennsington areas served by JEVS methadone clinic, can not meet	25,000		To provide over 7,500 life-sustaining meals to families, children and the elderly living with HIV/AIDS and cancer		40,000

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
<p>MANNA ON MAIN STREET To support the Dairy Day Program, providing free dairy products to approximately 132 low-income elderly</p>	\$5,000		<p>METRO CAMDEN HABITAT FOR HUMANITY To support the renovation of one housing unit, affordable to purchase for a family at 25-50% of median income</p>		50,000
<p>MATERNITY CARE COALITION OF GREATER PHILADELPHIA To purchase food, clothing and infant supplies for the MOMobile Program (a home visiting program that distributes clothing, diapers, food and infant supplies) and for the purchase of cribs</p>	45,000		<p>MONTGOMERY COUNTY COMMUNITY ACTION DEVELOPMENT COMMISSION To support the Food Resource Center, which provides emergency food distribution for the needs of 80 homeless for one year</p>	30,000	
<p>Challenge grant to support the Cribs For Kids program that supplies safe, portable cribs to needy families</p>	30,000		<p>Challenge Grant to support the Food Resource Center, which provides emergency food distribution for the needs of 80 homeless for one year</p>	5,000	
<p>To purchase food, clothing and infant supplies for the MOMobile Program (a home visiting program that distributes clothing, diapers, food and infant supplies) and for the purchase of cribs</p>		\$40,000	<p>NEIGHBOR TO NEIGHBOR To support the costs of food for distribution to low-income families and homebound seniors and to purchase equipment for their new, larger food distribution space</p>	15,600	
<p>Challenge grant to support the Cribs For Kids program that supplies safe, portable cribs to needy families</p>		20,000	<p>NHS FOUNDATION To support their Drop-In Respite Care Program in Lower Bucks County</p>	18,743	
<p>MAZZONI CENTER To fund their food bank, which is the largest HIV-Specific food bank in the region, providing groceries on an emergency and supplemental basis to over 1,200 low-income households living with HIV/AIDS in the Philadelphia region</p>		10,000	<p>NORTH LIGHT COMMUNITY CENTER To support the FISH Community Food Cupboard and Santa's Helpers Program</p>	10,000	
<p>MELMARK To renovate one building in order to make it a suitable home for eight mentally handicapped children ages six to eighteen</p>	56,000		<p>NORTHERN HOME FOR CHILDREN To purchase and install new windows in a structure being renovated to house young mothers and their children</p>	56,129	
			<p>NUEVA ESPERANZA To support the renovation of two homes that will be sold primarily to low-income women with children</p>	30,000	
			<p>To support the rehabilitation of 14 houses in the Hunting Park Project for sale to low-income families</p>		50,000

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
ONE HOUSE AT A TIME			PATHWAYS PA		
To provide funding for their Beds for Kids to purchase and distribute new mattresses and box springs to children in need	\$10,000		Repair the septic system and purchase basic clothing for the children in their care		36,000
Challenge Grant to provide funding for their Beds for Kids to purchase and distribute new mattresses and box springs to children in need	5,000		Challenge Grant to repair the septic system and purchase basic clothing for the children in their care		5,000
To provide funding for their Beds for Kids to purchase and distribute new mattresses and box springs to children in need		\$4,000	THE PATHWAY SCHOOL		
Challenge Grant to provide funding for their Beds for Kids to purchase and distribute new mattresses and box springs to children in need			To renovate remaining bathroom facilities in residential cottages for children and adolescents	45,000	
			To renovate five outdated bathrooms in their Audubon and Thomas Jefferson cottages		30,000
		2,000	Challenge Grant to renovate five outdated bathrooms in their Audubon and Thomas Jefferson cottages		10,000
OPERATION WARM			PENNSYLVANIA HOME OF THE SPARROW		
To provide funds for the organization to purchase 3,846 new winter coats for disadvantaged children in the Delaware Valley area		25,000	To support their Transitional Housing Program, which provides safe housing and basic resources for homeless mothers and their children		15,000
THE OTHER CARPENTER			PEOPLE'S EMERGENCY CENTER		
To cover the cost of materials and equipment for repairing and renovating homes for low income families and elderly	20,000		To support the Food Cupboard and the Relocation Fund for families moving from emergency shelter to transitional housing and ultimately to independent living	35,000	
OVERINGTON HOUSE, INC.			PHILABUNDANCE		
To support the cost to fix, upgrade and replace equipment in the transitional residence for homeless women with children	30,000		To support Kids Café, which provides free meals, snacks and nutritional education to low-income children through established after-school program sites such as community centers, churches, etc.	60,000	
PARKSIDE BUSINESS AND COMMUNITY IN PARTNERSHIP, INC.					
To support basic repairs to homes owned by low-income families and elderly in Camden	20,000				

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
<p>PHILADELPHIA CORPORATION FOR AGING To support their emergency fund, providing critical aid in the form of food, clothing and shelter for very poor, frail elderly in Philadelphia</p>	\$15,000		<p>RONALD McDONALD HOUSE OF SOUTHERN NEW JERSEY To support the direct cost of providing food and shelter for seriously ill children who are receiving medical care from local Philadelphia and Camden hospitals and for their families</p>	10,000	
<p>PHOENIXVILLE HOMES To replace carpet in Freedom House and to replace carpet with tile in Flag House</p>		\$28,000	<p>ROYER-GREAVES SCHOOL FOR BLIND To support roof repairs to the educational building of the residential facility for children and adolescents who suffer from blindness and multiple diagnoses</p>	15,000	
<p>PRESBYTERIAN HOME AT 58TH STREET To provide 27 elderly residents with three nutritious meals a day for one year</p>	50,000		<p>To provide funding for desperately needed repairs and upgrades to their facilities, which date back more than 100 years</p>		25,000
<p>Challenge Grant to provide 27 elderly residents with three nutritious meals a day for one year</p>	25,000		<p>SAUNDERS HOUSE Challenge Grant to purchase two new Parker Baths bathing systems similar to those funded by the Trust in 1998</p>	30,000	
<p>PROJECT H.O.M.E. To support the residential program for formerly homeless families who suffer from multiple special needs and who have children at risk</p>	30,000		<p>SENIOR COMMUNITY SERVICES To support the Chester Senior Center and its satellite kitchen's Senior Suppers program</p>	20,000	
<p>To provide shelter and food for elderly homeless living at Women of Change and St. Columbia's</p>		30,000	<p>SISTERS OF THE HOLY FAMILY OF NAZARETH To support the cost of installing a new fire alarm system to meet new code standards at the retirement home for elderly sisters</p>	20,000	
<p>RALSTON HOUSE To support lunches served to low-income elderly who attend Ralston Wellness Center and Horticultural Therapy Sessions</p>	8,000		<p>SOUTHWEST COMMUNITY ENRICHMENT CENTER, INC. To support the Congregate Meals Program, Emergency Food Cupboard, and Frozen Meals Program for families, children and the elderly</p>	8,000	
<p>REBUILDING TOGETHER PHILADELPHIA To purchase "house kits" in order to continue to work on rehabilitating the homes of low-income families, the elderly and those with disabilities</p>		23,800			

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY

	FISCAL 05/06	FISCAL 06/07		FISCAL 05/06	FISCAL 06/07
SPECIAL OLYMPICS PENNSYLVANIA To provide meals for 618 needy Special Olympics athletes on weekends and vacations while participating in the Pennsylvania Special Olympics	\$27,790		THE WENTWORTH HOME To support a project to convert one bedroom into two private baths, which will then be connected to the two adjoining residents' rooms		15,000
SURREY SERVICES FOR SENIORS To support Surrey Café, which provides nutritious well-balanced meals and social interaction to frail, under-resourced seniors	20,000		WESLEY HOUSE COMMUNITY CORPORATION, INC. To support renovation of half of the shelter for homeless families with children in Chester County	50,000	
To support Surrey Café, which provides nutritious well-balanced meals and social interaction to frail, under-resourced seniors		\$15,000	WEST CHESTER AREA SENIOR CENTER To support the direct costs of construction and equipment for a new kitchen	35,000	
Challenge Grant to support Surrey Café, which provides nutritious well-balanced meals and social interaction to frail, under-resourced seniors		5,000	To help provide nutritious breakfasts and lunches to low-income seniors five days a week		12,000
TREVOR'S CAMPAIGN FOR THE HOMELESS To support renovations and costs to purchase new furniture and equipment needed for the emergency shelter and transitional housing facility for women and children	30,000		WILLOW GROVE COMMUNITY DEVELOPMENT CORPORATION To support the purchase of supplies for building two twin homes for affordable purchase by low-income families in Abington Township		15,000
UNITED COMMUNITIES SOUTHEAST PHILADELPHIA To support the construction of four homes located at 2324 and 2351 South Beulah Street, 726 Hoffman Street and 731 Wolf Street	35,000		WINGS FOR SUCCESS To better the employment opportunities of low-income women by providing plus-sized, work appropriate attire, thus saving the clients money that can then be allocated for food and childcare		7,000
Matching Grant to support the construction of four homes located at 2324 and 2351 South Beulah Street, 726 Hoffman Street and 731 Wolf Street	15,000		WORDSWORTH ACADEMY To fund equipment and the Life Skills room needs	50,000	
			TOTALS	\$1,843,535	\$1,452,370

FOOD, CLOTHING, AND SHELTER FOR CHILDREN AND THE ELDERLY



A healthy snack finds its way to a young child, thanks to The Food Trust.



Getting a hug and a safe place to live, thanks to Baptist Children's Services.



The warmth of a new coat brings a smile to a needy child, thanks to Operation Warm.

TRUST POLICIES

The W. W. Smith Charitable Trust is a private foundation that grants only for three specific purposes: medical research in heart, cancer and AIDS; financial aid for full-time undergraduate students; and food, clothing and shelter for children, families and the elderly. Almost always, grants are limited to organizations located within the Pennsylvania counties of Bucks, Chester, Delaware, Montgomery and Philadelphia as well as the City of Camden, New Jersey.

Grants are made only to tax-exempt organizations not classified as private foundations or private operating foundations within the terms of the Tax Reform Act of 1969. Evidence is required from every applicant that the Internal Revenue Service currently approves of the organization's exempt status under Code Section 501(c)(3) or its analogues, and designates the proposing organization as not being a private foundation under section 509.

Grants are available to organizations with proven or prudently predictable records of performance, never directly to individuals. Capital projects and special programs may be funded (see separate program guidelines), but requests for deficit financing are not considered.

The Trust accepts and processes applications for grants throughout the year. All program areas have proposal deadlines; please see page 41 for the deadlines for specific grant purposes. Personal visits prior to the submission of a written proposal are discouraged. Please do telephone the Trust's office to ask questions prior to preparing a full proposal.

All proposals are carefully reviewed. If a request falls within the framework of Trust guidelines and present priorities, more detailed information may be requested and a site visit initiated by Trust staff.

Final decisions regarding qualified proposals and all grant terms are made by the Trustees. Proposal endorsement letters are discouraged.

Grantees are encouraged to announce information to the news media concerning their grants. Proposed copy must be reviewed and approved by the Trust in advance of release. Commemoratives are not expected.

No part of any grant may be subjected to a fundraiser's commission. Proposals will not be considered for development officer capacity-building.

The Trust budgets no funds to purchase meal tables, program advertisements, golf tournament sponsorships, organizational memberships, or to support analogous fundraising events.

Prompt repayment to the Trust of grant funds unused within the period specified in the Trust's award notification letter is expected. Interest earned on Trust funds during any such time interval may not be retained by any grantee.

Except for medical research protocols, no extra copies of proposals are needed.

As with any prospective grant concept, a letter or phone call of inquiry prior to preparing a full proposal is always appropriate.

Normal business hours are 8:30 a.m. to 5:00 p.m., Monday through Friday: phone 610-397-1844.

GRANT APPLICATION GUIDELINES

PROGRAM AREAS

Proposals will be considered only for the following purposes:

1. Specific, basic medical research projects dealing with heart disease, cancer or AIDS
2. By invitation of the Trust only: MSCHE accredited, four-year universities' and colleges' financial aid programs for needy, worthy, full-time undergraduate students (No request ever is accepted directly from an individual student.)
3. To provide food, clothing or shelter for children ages 18 or under (including needy families with dependent children) or the elderly ages 60 and above

The Trustees endeavor to keep abreast of the needs and conditions in the area served by the Trust and variations from these policies may be made at their discretion.

HEART DISEASE, CANCER AND AIDS RESEARCH

See page 16 for specialized guidelines and requirements.

In order to give the Trust's independent advisory committees time to review applications, it is required that grant proposals be received no later than June 15 for cancer and AIDS research and no later than September 15 for heart research. When these dates fall on holidays or weekends, the deadline for proposal submission is 5 p.m. on the last business day before the holiday or weekend.

No more than one application per institution may be submitted in each of the three research fields annually. Each application must be submitted in quadruplicate and accompanied by a copy of the most recent audited financial statements for the researcher's institution. Proposals must be submitted to the Trust with a letter of endorsement from the institution's senior official for the research function.

Funding requests and project awards may range from one to three years duration. It is Trust policy that proposals not request funding for equipment alone. Copies of all published material relevant to a proposed research project should be made available to the Trust both before and after a grant is made.

Every proposal must be submitted to the Trust with a letter of endorsement from the institution's senior official for the research function. Unendorsed protocols or proposals not following the Trust's research application form will not be considered.

Unused grant funds must be returned to the Trust promptly so that the funds may be put toward another worthwhile research request.

GRANT APPLICATION GUIDELINES

SCHOLARSHIP FINANCIAL AID PROGRAM

Proposals for grants to MSCHE accredited colleges and universities are by invitation only and must be received by April 1. Funding will be awarded at the May Trustee meeting.

Institutions are required to screen financial aid applicants and award the Trust's scholarship funds only to full-time undergraduate students who are in good academic standing and are considered most needy and worthy. Selected students are required to be permanent residents of Bucks, Chester, Delaware, Montgomery and Philadelphia counties or the City of Camden, New Jersey. Out-of-state students (with the exception of the City of Camden, New Jersey) who gain residency status due to college enrollment are not eligible for funding. Proposals should detail the selection process used to identify qualified students whose financial needs are not being met by existing policies.

Each Smith Scholar, Prize-Winner and SEA participant is required to write the Trustees a thank you letter.

Recipient institutions are visited once every two years by the Trust staff. No grants are made for endowment, equipment, construction, capital campaigns, annual giving or other purposes.

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND THE ELDERLY

Requests for grants for food, clothing or shelter for children and the elderly from non-profits located in Bucks, Chester, Delaware, Montgomery and Philadelphia counties or the City of Camden, New Jersey are considered at the March and September Trustee meetings. In order to give the Trust's grant administrator time to review proposals and schedule site visits, it is required that grant proposals be received no later than January 15 for the March meeting and no later than July 15 for the September meeting. When these dates fall on holidays or weekends, the deadline for proposal submission is 5 p.m. on the last business day before the holiday or weekend.

The Trust's project summary sheet, which is available online or from the Trust's office, must accompany the proposal and be completed in full, including the amount requested, a summary of the request, description and justification of the proposed project, etc. The following enclosures are required to be submitted with all proposals:

- The W. W. Smith Charitable Trust project summary sheet
- Project budget and timetable
- Current fiscal year operating budget for the organization
- List of anticipated sources of other funding
- List of officers and board members, and
- Audited financial statement for the organization's most recent fiscal year. (If not audited, include the most recent Internal Revenue Service filing of form 990. If too small to file form 990, telephone the Trust for assistance.)

GRANT APPLICATION GUIDELINES

A site visit is mandatory after all required documentation is received. Please plan ahead and apply early.

Applications should be for no less than \$5,000. Food, clothing and shelter grant requests will be funded for one year only. Funding to an organization may be made for only three consecutive calendar years, after which at least two consecutive calendar years must pass before another application can be considered.

No proposals will be considered for retroactive funding of non-emergencies.

Applicants are limited to one proposal at a time and one grant within any twelve month period.

Satisfactory post-grant narrative and financial reports are prerequisites to any future proposal consideration.

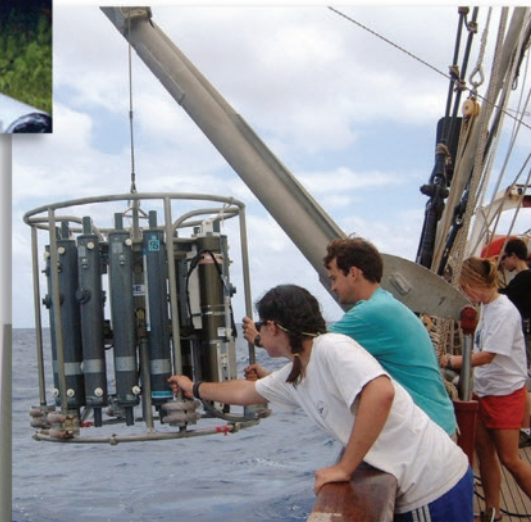
As a general rule, the further away a request is from direct provision of literal food, clothing or shelter, the less likely funding will be granted. This normally excludes consideration of requests from summer camps, YMCAs, YWCAs, adult daycare and child daycare programs. Additionally, studies are rarely underwritten. New housing development is considered less favorably than renovations to existing low income properties. Requests to purchase or enhance computer systems are almost always denied. Proposals for vans or transportation funds are not accepted. The Trust does not fund requests for general operating expenses.



ANNUAL GRANTMAKING SCHEDULE

<i><u>PROGRAM AREA</u></i>	<i><u>APPLICATION DEADLINE</u></i>	<i><u>TRUSTEES MEETING</u></i>
Food, Clothing and Shelter	January 15 July 15	March September
Scholarship Financial Aid	April 1	May
Cancer and AIDS Research	June 15	September
Heart Research	September 15	December

All applicants will be notified by the Trust, in writing, within 30 days after the relevant Trustees meeting. It is not necessary to telephone the Trust unless there is an important change in your organization's circumstances or you do not receive a letter within this time period. Generally, grants are paid within 60 days of the Trust's receipt of the recipient organization's signed award notification letter.



The W. W. SMITH

CHARITABLE

TRUST

HAS TOUCHED SO MANY LIVES...



“Success – He has achieved success who has lived well, laughed often, and loved much; who has enjoyed the trust of pure women, the respect of intelligent men, and the love of little children; who has filled his niche and accomplished his task; who has left the world better than he found it whether by an improved poppy, a perfect poem, or a rescued soul; who has never lacked appreciation of Earth’s beauty or failed to express it; who has always looked for the best in others and given them the best he had; whose life was an inspiration; whose memory a benediction”

Extraordinary words written in 1904 by Bessie A. Stanley

This quote was selected as the first-prize winning entry in a contest sponsored by Modern Women magazine. These words capture the spirit of Bill Smith and his legacy.

The **W. W. SMITH**

CHARITABLE TRUST
200 Four Falls Corporate Center, Suite 300
West Conshohocken, PA 19428