

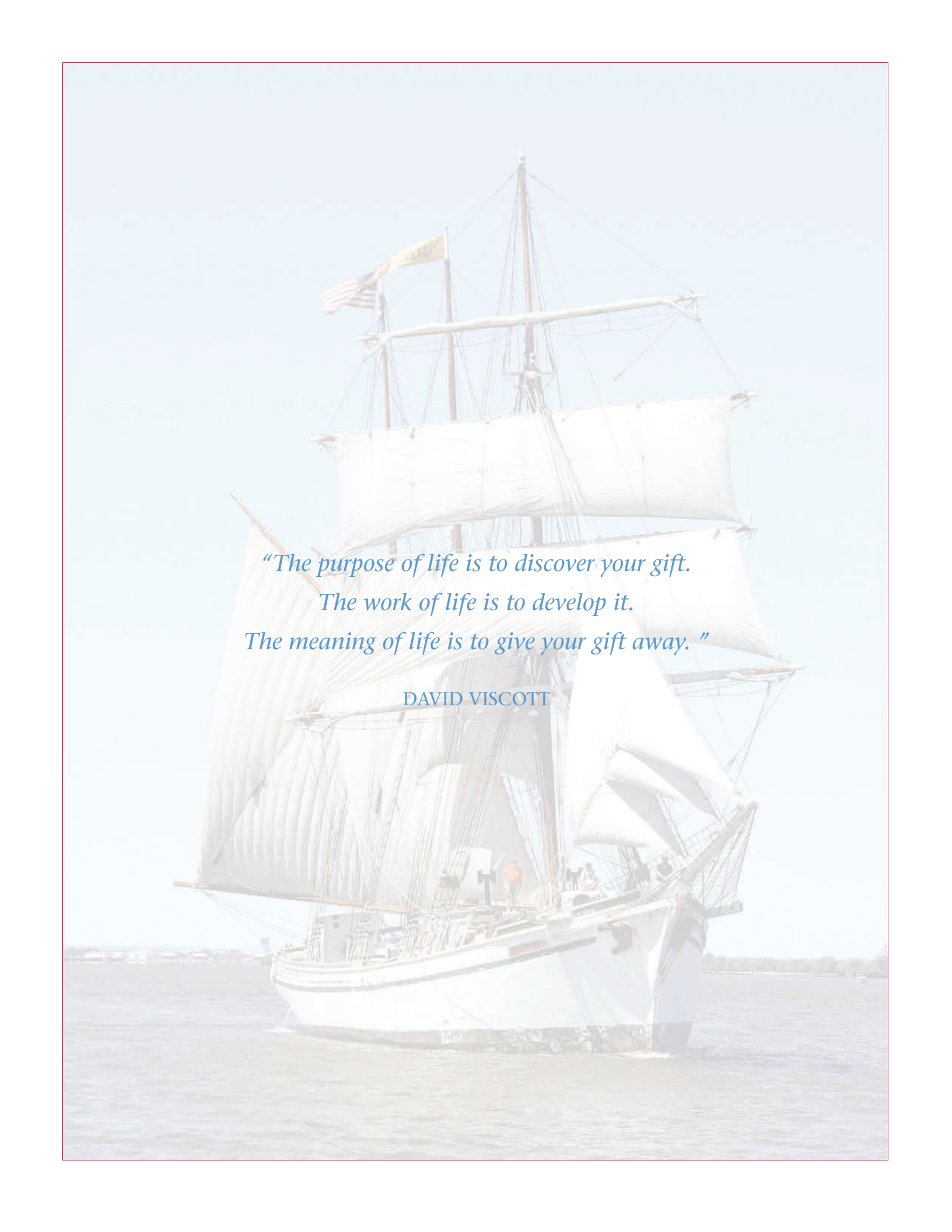
THE W. W. SMITH

CHARITABLE TRUST

HELPING ORGANIZATIONS AND
INDIVIDUALS ACHIEVE THEIR GOALS,
HOPES AND DREAMS.

JULY 2015 – JUNE 2017

REPORT



*“The purpose of life is to discover your gift.
The work of life is to develop it.
The meaning of life is to give your gift away.”*

DAVID VISCOTT

THE W. W. SMITH CHARITABLE TRUST

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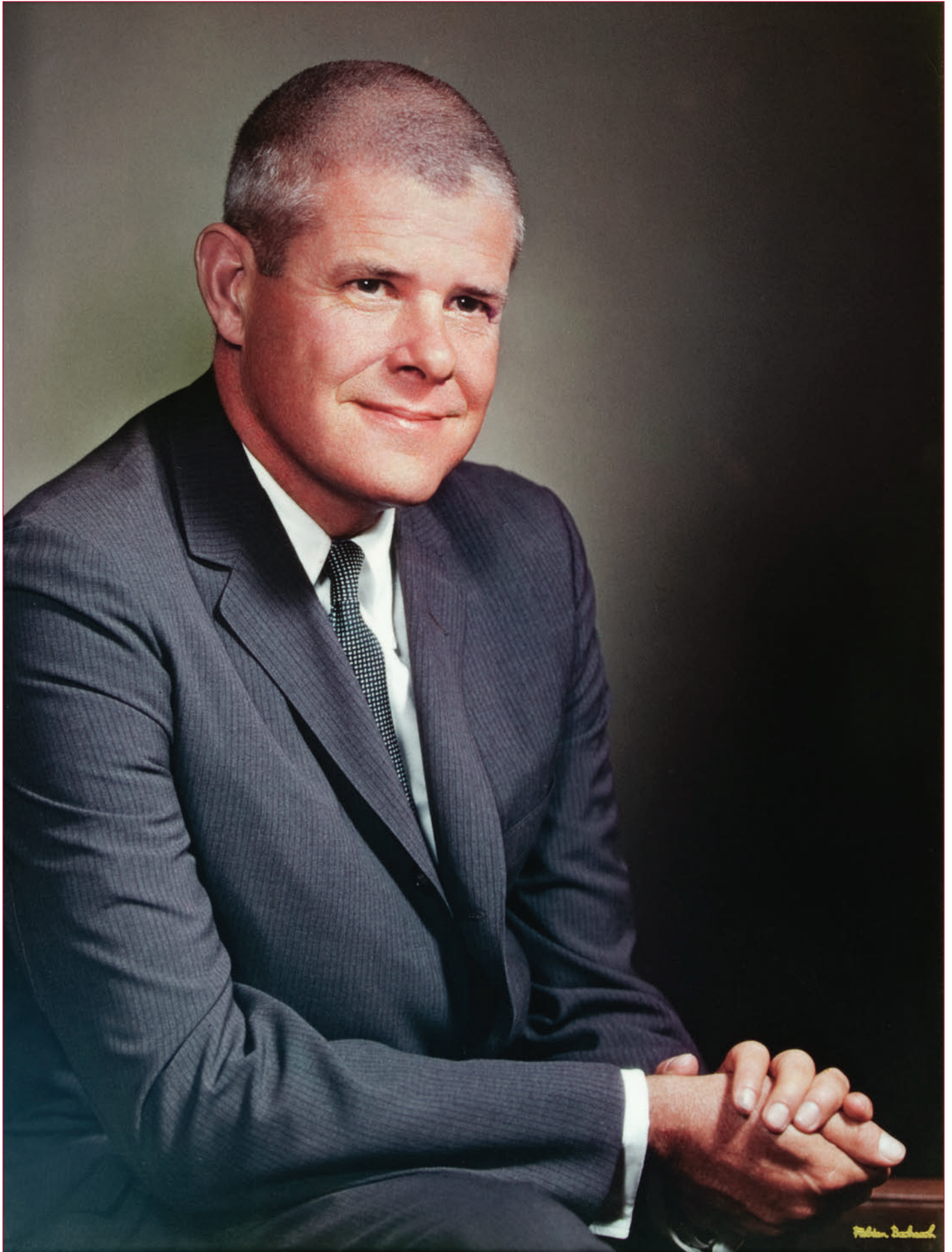
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THE W. W. SMITH CHARITABLE TRUST

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WILLIAM WIKOFF SMITH

Having accomplished much in his life, Bill Smith was one of those rare individuals who was destined to continue to achieve even after he passed away. During his life he built a Fortune 500 international corporation, Kewanee Industries – which spanned the globe drilling for oil and gas, shipping petroleum, and manufacturing specialty chemicals. After his untimely death, his philanthropic interests came front and center. Since 1977, the W. W. Smith Charitable Trust has disbursed significant sums to help thousands get healthier, become educated, find a home, receive help. Bill Smith was born in 1919 and his story continues – especially for those in our society who have been left behind and have needed a boost.

Some are born to lead. Bill Smith was one such person. His interests were varied, from business to sailing and photography. But in each endeavor he was passionate about his craft and he consequently became expert in each. At the young age of 28, he assumed control of the oldest independent oil and gas company in the United States, Kewanee Oil Company, founded in 1871. Besides drilling for new reserves, Kewanee developed secondary oil recovery expertise in waterflooding – a process which injected water under high pressure in older oil fields to capture production which had been left behind after primary recovery techniques had been used. In Osage County, Oklahoma, after a particularly successful waterflood program had been instituted, dramatically increasing oil production from the area, Bill was inducted into the Osage Tribe of Indians as an Honorary Chief of the Deer Clan – a recognition about which he was especially proud. Seeking to balance the fortunes of Kewanee, Bill Smith and his management team diversified the company interests. Acquisitions followed, first in 1957 with the purchase of Mathiasen's Tanker Industries Inc. Then in 1966, Kewanee bought The Harshaw Chemical Company of Cleveland, Ohio. In 1967, Sound Refining Inc. came on stream.

Finally in 1975, Millmaster Onyx, another specialty chemical company, was acquired. Oil and gas production was always the heart of Kewanee. But over the decades the company successfully diversified its income stream, resulting in a well-balanced industrial operation.

Bill's other loves of sailing and photography were well documented. The Gazela of Philadelphia, known by thousands as an Ambassador for the City of Philadelphia, was purchased by Bill Smith in Portugal and sailed back to America (with him in crew) following Christopher Columbus' route. He gave the ship to the Independence Seaport Museum, which in turn gave it to Philadelphia after many years of stewardship. Photographic images of his life fill numerous frames and books. Bill was an avid and accomplished photographer. His photography revealed an interesting perspective of a multidimensional man.

Generous and caring, Bill Smith created the W. W. Smith Charitable Trust to help many who need aid. Since 1977 in excess of \$217 million has been distributed, fulfilling his sense of being a responsible citizen and his desire to give unfortunate people hope.

REFLECTING ON 40 YEARS OF GRANTMAKING

EMPOWERING COMMUNITY, INSPIRING WISDOM, PROMOTING DISCOVERY

William Wikoff Smith could not have envisioned the world 40 years after the genesis of his legacy, the W. W. Smith Charitable Trust. Nonetheless, his intention has endured the passage of time. Although the foundation has evolved and looks somewhat different than it did in 1977, the mission has remained fundamentally the same, holding fast to core focus areas of ensuring basic human needs, supplementing higher education, and enabling basic medical research. In addition, in recognition of Mr. Smith's ardent interest in sailing vessels and the Philadelphia waterfront, funding has broadened to support maritime education to promote public awareness, appreciation, and access to Greater Philadelphia waterways.

As we take a moment to reflect, we see the ripple effects of what William Wikoff Smith set in motion over four decades ago. Results cannot be counted in numbers alone, but rather in lives affected. Notable highlights include:

1977

The W. W. Smith Charitable Trust was established and funded under the Will of William Wikoff Smith.

1987

The Trust completed its first decade of operation as the third largest private foundation in Philadelphia and tenth in size in Pennsylvania as measured by total assets.

AIDS research was added to the Trust's decade-long support for basic medical research.

1997

Completed a multi-year grant to facilitate the renovation of the Port of History building so that the Independence Seaport Museum could relocate its quarters from the Independence Park Historic District to the Penn's Landing waterfront.

Established The William Wikoff Smith Endowed Chair in Cancer Research at Fox Chase Cancer Center and The William Wikoff Smith Endowed Chair in Cardiovascular Research at Thomas Jefferson University.

2007

Funded installation of a ceiling mounted track lift system for HMS School for Children with Cerebral Palsy. The system provides students with safer, smoother, and more comfortable transfers within the residential area, while increasing staff safety when transferring heavier students between beds, wheelchairs, and bathroom facilities.

Established The William Wikoff Smith Endowed Chair in Cardiovascular Research at Lankenau Hospital to fortify the Main Line Health Heart Center's clinical research programs.

2017

Initiated a two-year pilot program for community colleges, technical colleges, and trade schools to assist under-resourced students who are unable to attend a four-year college or whose career aspirations may not require a four-year degree.

Expanded the food, clothing and shelter program to include support for low-income cancer patients and their families in the form of food, clothing, utility bills, and assistance with housing payments.



*Mrs. Mary L. Smith
Emeritus Trustee*

Mary L. Smith, Inaugural Trustee, dedicated the past 40 years to building, growing and steering the Smith Trust. Her devotion and compassion for helping others in need, and for affording opportunities to pave the way for medical advances, became an integral part of her altruist approach to living and giving.

"It would take writing several volumes of a book to express the appreciation I have for the years of love, hard work, and dedication everyone has given to fulfill Bill's dream. Building the Trust and seeing it grow has been one of the most rewarding times of my life." – Mary L. Smith

As she nears retirement, Mrs. Smith is proud to pass the honor of Trustee to her daughter, Louise A. Havens.

The Trust enters its 41st year revering our history, preserving the legacy, and growing our future.



REVIEW OF THE PAST TWO FISCAL YEARS

Giving during the past two fiscal years reaffirmed the Smith Trust's enduring mission of working with the community to sustain basic human needs, supplement higher education scholarships, support maritime education, and enable basic medical research in the areas of heart disease, cancer, and AIDS. Major funding cuts, both federal and local, resulted in the demand for basic needs of food, clothing and shelter to remain at crisis levels. During this time of unrelenting community need, the Trust renewed emphasis on providing a safety net through the Basic Needs Program, with the focus being on direct provision of food, clothing and shelter for both emergencies and on-going unmet daily needs.

Financial holdings continued to be redefined, with the goal of growing the value of the portfolio with stable, high-performing assets, and safe holdings. The Trust, with the prudent counsel of expert outside advisors, has been fortunate to have the benefit of consistent and excellent stewardship at all levels. Grants of \$16,658,078 were approved during the past two fiscal years, July 2015 through June 2017, bringing total distributions made since 1977 to \$217,664,384.

BASIC NEEDS

Basic Needs continued to see a large demand in requests for food. With local, state and federal cutbacks, many food pantries, soup kitchens, and food banks find their shelves empty and turn to grants to help fill their cupboards. The extent and severity of addressing human basic needs have dramatically increased in recent years. Due to this increased need, during the past two fiscal years the Trust has looked to fund organizations that offer smart, fiscally sound, and dynamic approaches to solving ever-growing community problems. Each of these organizations employs various efforts for addressing immediate basic needs among the thousands of seniors, children and families impacted each year. Most of the organizations the Trust funds have no claim to fame; they are just ordinary people

serving and caring for their neighbors, sometimes in extraordinary ways.

SMITH SCHOLARS

Smith Scholars come from diverse backgrounds, but all have something in common – the skills, determination, and leadership abilities to maintain the academic standards required to achieve their goals, to live their dreams. Over the last 40 years, many Smith Scholars have continued on to distinguished graduate schools, becoming dynamic influences in their professions and neighborhood communities. During the past two fiscal years, the Trust added Rowan University and Rutgers University to our roster of four-year colleges, thereby expanding scholarship assistance to the City of

Camden, NJ. Beginning with the 2016-2017 academic year, the addition of a two-year pilot program for community colleges, technical colleges, and trade schools expanded the Trust's educational outreach to encompass under-resourced students who are unable to attend a four-year college or whose career aspirations may not require a four-year degree.

MEDICAL RESEARCH

Medical Research continues to broaden with each significant new discovery and technical innovation. Basic medical research provides the starting point essential to developing solutions to understand and combat disease; it can give rise to new research tools and techniques, some of which have trailblazing medical applications. During the past two fiscal years, the Trust awarded two special medical research grants to JDRF for cutting-edge diabetes research projects at University of Pennsylvania and Children's Hospital of Philadelphia. In addition, the Trust funded a four-year special grant to the University of Pennsylvania to establish The William Wikoff Smith Professorship of Orthopaedic Surgery at the Raymond and Ruth Perelman School of Medicine. We are very proud to have funded outstanding researchers in conducting basic medical research at the forefront of innovative discoveries.

PHILADELPHIA MARITIME

Philadelphia Maritime grants supported boatbuilding and maritime educational programs in Philadelphia and Camden, providing hands-on experience to low-income middle and high school youth in traditional wooden boatbuilding and riverine sciences. Through the boatbuilding process students learn the skills to become productive, responsible adults, to make constructive life decisions, and to succeed in employment or post-secondary education. This is especially important

for at-risk youth living in areas with significant unemployment, high incidence of crime, violence, and poverty.

SPECIAL GRANTS

As part of our commitment to the community, the Trust funded two special grants to the Zoological Society of Philadelphia to support the zoo's Community Access Program, providing zoo visits to children who otherwise would not have the chance to experience the zoo.

The Trustees wish to thank all of the organizations that submitted proposals during this time period, the members of the Trust's independent medical advisory committees, the investment team, and the Trust staff.

GRANTS APPROVED SUMMARY

AUGUST 1977 THROUGH JUNE, 30 2017

# OF GRANTS	GRANTS	GRANTS AMOUNT
218	Grants for Medical Research Heart Program	\$32,258,676
263	Grants for Medical Research Cancer Program	\$27,527,799
72	Grants for Medical Research AIDS Program	\$7,117,138
1,228	Grants for College Financial Aid Scholarship Program	\$64,938,681
358	Grants for College Financial Aid Prize Program	\$3,300,000
71	Grants for Sea Education Program	\$523,633
1,992	Grants for Food, Clothing and Shelter Program (includes regular and challenge grants)	\$49,018,683
304	Grants for Indigent Care Program	\$8,543,526
11	Grants for Juvenile Diabetes Program	\$2,147,432

SUBTOTAL

4,517		\$195,375,568
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# OF GRANTS	FELLOWSHIP AWARDS	GRANTS AMOUNT
14	Fellowship Awards	\$660,000

SUBTOTAL

14		\$660,000
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# OF GRANTS	SPECIAL GRANTS	GRANTS DATE	GRANTS AMOUNT
1	Bryn Mawr Hospital	(1/24/95)	\$ 25,000
1	Children's Hospital of Philadelphia	(3/6/01)	1,000,000
1	The Exuma Foundation (in memory of Mr. Dorrance)	(9/15/11)	100,000
2	Fox Chase Cancer Center	(4/30/98) (6/11/99)	1,500,000 500,000
1	Johns Hopkins University	(6/19/02)	2,000,000
1	Lankenau Hospital	(12/14/06)	1,500,000
2	Lankenau Institute for Medical Research	(12/23/04) (6/13/13)	504,468 625,000
1	Temple University	(6/13/13)	2,500,000
1	Thomas Jefferson University	(4/30/98)	1,500,000
4	University of Pennsylvania	(6/21/04)	2,000,000
	Mr. Humpton Memorial	(7/29/10)	100,000
	Mr. Dorrance Memorial	(12/22/11)	50,000
	Mr. Humpton Memorial	(12/22/11)	50,000
1	Islet Transplantation Program Fund in honor of Arthur H. Rubenstein, MBCh	(9/20/12)	150,000

GRANTS APPROVED SUMMARY

# OF GRANTS	SPECIAL GRANTS (CONT'D)	GRANTS DATE	GRANTS AMOUNT
1	William Wikoff Smith Professorship of Orthopaedic Surgery at the Raymond and Ruth Perelman School of Medicine	(1/05/17)	\$3,000,000
1	The Wistar Institute	(6/13/13)	1,500,000
2	Woman One Scholarship Fund (Drexel University College of Medicine)	(4/16/12) (12/12/13)	80,000 80,000
1	Zoological Society of Philadelphia	(6/13/00)	1,000,000
1	Zoological Society of Philadelphia	(11/16/15)	75,000
1	Zoological Society of Philadelphia	(10/13/16)	150,000

SUBTOTAL

23		\$19,989,468
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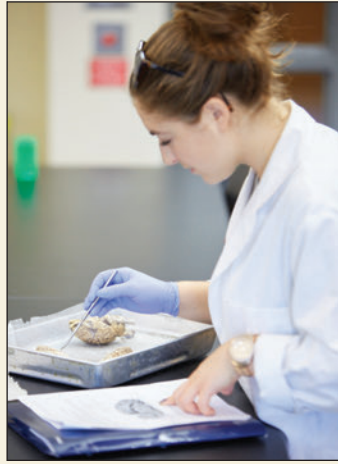
# OF GRANTS	MARITIME GRANTS	GRANTS DATE	GRANTS AMOUNT
4	Independence Seaport Museum	(3/23/92) (12/8/11) (9/19/13) (9/17/15)	\$ 500,000 100,000 75,000 75,000
6	Philadelphia Ship Preservation Guild	(6/9/88) (10/4/90) (2/20/91) (6/19/02) (10/04/11) (11/13/12)	50,000 200,000 12,500 75,000 200,000 100,000
1	Philadelphia Wooden Boat Factory	(4/11/13)	25,000
1	Philadelphia Wooden Boat Factory	(9/18/14)	35,000
1	Philadelphia Wooden Boat Factory	(9/17/15)	40,000
1	Philadelphia Wooden Boat Factory	(4/20/17)	46,000
1	Sea Education Association	(9/18/14)	22,608
1	UrbanPromise Ministries, Inc.	(9/18/14)	25,000
1	UrbanPromise Ministries, Inc.	(9/17/15)	25,000
1	UrbanPromise Ministries, Inc.	(4/20/17)	33,240

SUBTOTAL

18		\$1,639,348
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GRAND TOTAL

4,572 Grants		\$217,664,384
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GRANTS

MEDICAL RESEARCH

SCHOLARSHIP PROGRAM

BASIC NEEDS PROGRAM

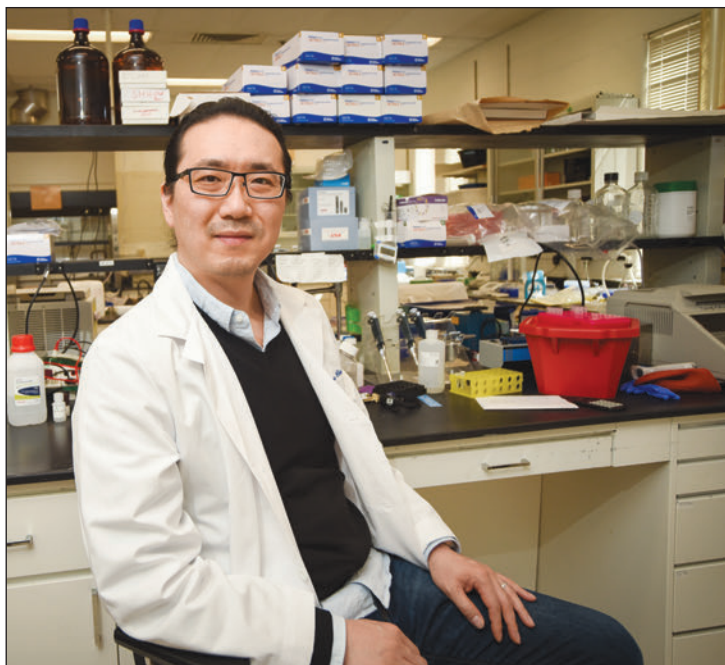
PHILADELPHIA MARITIME PROGRAM



MEDICAL RESEARCH: HEART DISEASE, CANCER, AND AIDS

Smith Research Scholars represent some of the most distinguished scientists in the medical research arena today. The Trust's medical research awards are highly competitive. The selection process begins with the nomination by the research institution of its foremost candidate. To further enhance the effectiveness of our research grants, a distinguished medical advisory committee comprised of prominent scientists guides the Trustees to fund projects having the potential to provide an immediate and direct influence on the fight against heart disease, cancer, and AIDS.

The examples shared here provide insight into promising basic medical research funded by the W. W. Smith Charitable Trust during fiscal years 2015-2016 and 2016-2017.



Jason Choi, Ph.D. at Thomas Jefferson University is studying a form of inherited cardiomyopathy caused by mutations in the LMNA gene.

gene (LMNA cardiomyopathy). Their particular interest is to understand the complex interplay that occurs between two main cell types in the heart during the development of LMNA cardiomyopathy: cardiac fibroblasts and cardiomyocytes.

Dr. Jason Choi's lab has elucidated cell type specific effects of LMNA mutation in both cardiac fibroblasts and cardiomyocytes, allowing them to better understand how these cells uniquely contribute to development of the disease. With these new insights, the Choi lab aims to devise novel therapies that improve cardiac performance or prevent heart muscle deterioration. The novel data generated serves as the crucial foundation to broader research and novel advances within the field of heart disease.

Inherited cardiomyopathies are a major cause of heart disease with symptoms that can develop at any age. Patients are almost always burdened with decreased quality of life and longevity. Although current therapies based on past discoveries may prolong survival, they are targeted more at mitigating the complications of the disease rather than the underlying pathogenesis; therefore, they do not prevent the progression of heart failure.

The Choi Laboratory at Thomas Jefferson University is interested in studying a form of inherited cardiomyopathy caused by mutations in the LMNA



Dr. Jason Choi reviews results with research assistants Elizabeth Philips and Kunal Sikder.

As our population has rapidly aged during the past century, age-related disorders such as heart failure and neurodegenerative disease have become serious public health issues. Although most of the pathology is seen in the brain, heart failure is the second leading cause of death in patients with the inherited neurodegenerative disorder, Huntington's disease (HD). HD is caused by a single genetic mutation in the gene known as huntingtin (Htt). This mutation prevents Htt proteins from folding properly and causes them to clump together into larger structures known as aggregates. These aggregates are highly toxic and disrupt many vital processes in cells and tissues, causing debilitating neurological decline in cognitive and motor functions. While mutant Htt aggregates are abundant in HD patient brains, they do appear in other tissues, including the heart. However, it is

unclear how the genetic mutation leads to cardiac abnormalities and fatal heart disease in almost a third of these patients.

The Pearce lab at University of the Sciences is working to understand the relationship between Htt aggregate formation in cardiac cells and the progression of HD in patients. Dr. Margaret Pearce's innovative work uses a fruit fly (*Drosophila melanogaster*) model of HD to study the toxicity of mutant Htt aggregates formed in heart tissue. This fruit fly model takes advantage of sophisticated genetic tools that have been developed over 100 years of using this model organism in biomedical research. These tools allow the Pearce lab to examine the effects of genetic mutations associated with human diseases in isolated tissues as well as how different cell types



Margaret Pearce, Ph.D., at University of the Sciences works to understand the relationship between Htt aggregate formation in cardiac cells and the progression of HD in patients.

interact in the disease state. The research taking place in the Pearce lab is evaluating the effects of mutant Htt aggregation in the heart and to shed light on how cardiac pathology contributes to HD progression throughout the body. In the future, new information obtained from this study will help to identify targets for new therapies that alleviate these lethal cardiac defects. These studies will also advance understanding of the pathogenesis underlying other diseases associated with protein aggregate deposition in the heart (e.g. systemic amyloidoses and diabetes).



Dr. Pearce in the lab with University of the Sciences graduate students Kirby Donnelly (left) and Graham Davis (seated).

Type 1 diabetes (formerly referred to as juvenile diabetes) research is advancing at a rapid pace with transformative breakthroughs on the horizon in accelerating progress toward a cure and prevention. During the past two fiscal years, the Trust has granted special funding to JDRF for cutting-edge diabetic kidney disease research at the University of Pennsylvania, and pancreatic research performed jointly at Children's Hospital of Philadelphia and the University of Pennsylvania.

It is impossible to quantify exactly how much progress has been made through basic medical research. The Trust promotes innovative basic research having the potential to pave the way to groundbreaking medical advances and new scientific discovery.

Fiscal Years 2015-2017

Medical Research Grants: 36

Low and High Dollar Amounts:

\$98,000 to \$125,000



A research assistant in the Pearce lab at University of the Sciences prepares and evaluates testing.

HEART DISEASE, CANCER, AND AIDS RESEARCH

ORGANIZATION	PROJECT	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
	Heart Disease Research		
Children's Hospital of Philadelphia Foundation	"Mechanism of CD47 Mediated Inhibition of Platelets"	\$ 100,000	\$ —
Children's Hospital of Philadelphia	"Novel Strategies to Improve Cardiac VLCAD Deficiency"	110,000	—
Children's Hospital of Philadelphia	"Nanoparticle-Prodrug Combination for Restenosis Therapy"	—	110,000
Drexel University	"Vascularized Magnetic Scaffolds for Treatment of Myocardial Infarction"	100,000	—
Drexel University	"Regulation of Cardiac BKCa Channels and Their Role in Cardioprotection From Ischemia-Reperfusion Injury"	—	108,000
Johns Hopkins University	"Manipulating Communication Networks of Human Atrial Fibrillation"	100,000	—
Pennsylvania State University, Milton S. Hershey Medical Center	"Identifying Non-Coding Casual Variants in Heart Disease"	119,371	—
Pennsylvania State University, Milton S. Hershey Medical Center	"The Role of Polycomb Repressive Complexes in Cardiac Differentiation"	—	110,000
Temple University	"Cardiac Energy Metabolism Regulates Cardiomyocyte Proliferation"	—	120,000
Thomas Jefferson University	"Role of CXCR4 in Cardiac Myocytes Apoptosis Induced by Inflammatory Proteases"	103,000	—
Thomas Jefferson University	"Unraveling the Role of Cardiac Fibroblasts in the Pathogenesis of LMNA Cardiomyopathy"	—	125,000
University of Pennsylvania	"Magnetic Resonance Imaging of Myocardial Work Density in Heart Failure"	115,169	—
University of Pennsylvania	"Hdac3 Regulates Nuclear Architecture During Cardiogenesis"	—	115,500
University of the Sciences in Philadelphia	"The Role of Protein Aggregation in Cardiomyopathy Associated With Huntington's Disease"	—	100,000
TOTAL HEART DISEASE RESEARCH		\$747,540	\$788,500

HEART DISEASE, CANCER, AND AIDS RESEARCH

ORGANIZATION	PROJECT	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
	Cancer Research		
The Children's Hospital Foundation	"Understanding Cancer-Cell Killing Mechanisms of Immune Cells"	\$ 100,000	\$ —
The Children's Hospital Foundation	"Defining the Cell Surface Landscape of Neuroblastoma"	—	110,000
Children's Hospital of Philadelphia	"Novel iNKT Cell-Based Immunotherapy of High-Risk Neuroblastoma"	—	110,000
Drexel University	"Creating a New Paradigm for Pancreatic Cancer Treatment"	100,000	—
Drexel University	"Targeting a K-Ras-HuR Signaling Loop in Malignant Pancreatic Cancer"	—	110,000
Fox Chase Cancer Center	"The Role of IL-1 Signaling and its Therapeutic Implications in Inflammation and Hepatocellular Carcinoma"	100,000	—
Fox Chase Cancer Center	"Dissecting the Role of BEX1 and NPTX1 in Drug Response in GIST"	—	125,000
Johns Hopkins University	"Widespread but Cancer-Selective Gene Therapy of Brain Tumors"	100,000	—
Johns Hopkins University	"Activating Tumor Suppressor PTEN"	—	100,000
Temple University	"UV-Induced Epigenetic Field-Effect as a Novel Target for Melanoma Therapy and Prevention"	100,000	—
Thomas Jefferson University	"Elimination of Adoptive Cell Therapy (ACT) Toxicity by Hypoxic Regulation of Antigen Receptors"	100,000	—
Thomas Jefferson University	"Hormone-Dependent Small Functional RNAs in Breast and Prostate Cancers"	—	125,000
University of Pennsylvania	"The Role of the Nuclear Pore Complex in Gene Regulation and Cancer"	—	102,700
University of the Sciences in Philadelphia	"The Role of Ascorbic Acid (Vitamin C) Transporters (SVCT1/SVCT2) on Prostate Cancer Proliferation, Invasiveness and Tumorigenesis"	100,000	—
University of the Sciences in Philadelphia	"Unraveling Molecular Mechanisms of BRAF Activation to Improve Therapy in Melanoma"	—	101,000
Wistar Institute	"Regulation of Cellular Senescence Through 3D Genome Organization"	106,000	—
TOTAL CANCER RESEARCH		\$806,000	\$883,700

HEART DISEASE, CANCER, AND AIDS RESEARCH

ORGANIZATION	PROJECT	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
	AIDS Research		
Johns Hopkins University	“Expansion Dynamics and Functional Analysis of HIV-1 Latent Reservoir”	\$ 99,757	\$100,000
Temple University	“A Novel Approach for the Eradication of HIV-1 Infection”	100,000	—
University of Pennsylvania	“A New Approach for Concurrent Detection of HIV Co-Infections”	—	107,000
University of the Sciences in Philadelphia	“High Resolution Imaging of Nuclear Events in HIV-1 Latency”	99,615	—
University of the Sciences in Philadelphia	“Real Time, High Resolution Imaging of Chromatin at the HIV-1 Promoter”	—	98,000
TOTAL AIDS RESEARCH		\$299,372	\$305,000
FISCAL YEAR MEDICAL RESEARCH TOTALS		\$1,852,912	\$1,977,200
SPECIAL GRANTS			
Juvenile Diabetes Research Foundation	University of Pennsylvania, “Menin Regulates GLP-1 Signaling and Beta Cell Proliferation” and Children’s Hospital of Philadelphia/University of Pennsylvania “Epigenetic Programming of Pancreatic Alpha Cells to Beta Cells”	\$115,000	—
Juvenile Diabetes Research Foundation	University of Pennsylvania, “RNA Sequencing Analysis of Human Diabetic Kidney Disease” and “Menin Regulates GLP-1 Signaling and Beta Cell Proliferation”	—	\$ 126,460
University of Pennsylvania	The William Wikoff Smith Professorship of Orthopaedic Surgery at the Raymond and Ruth Perelman School of Medicine: four-year grant	—	3,000,000
Zoological Society of Philadelphia	Support for the zoo’s Community Access Program, providing zoo visits to children who otherwise would not have the chance to experience the zoo.	75,000	—
Zoological Society of Philadelphia	Two year support for the zoo’s Community Access Program, providing zoo visits to children who otherwise would not have the chance to experience the zoo.	—	150,000
TOTAL SPECIAL GRANTS		\$190,000	\$3,276,460



SCHOLARSHIP PROGRAM

HELPING FULL-TIME UNDERGRADUATE STUDENTS ACHIEVE EDUCATIONAL GOALS

The W. W. Smith Charitable Trust continues to sustain William Wikoff Smith's strong belief that education is a commitment to lifelong learning and personal growth. Over 40 years the W. W. Smith Scholarship Program has invested more than \$68 million in the lives of full-time undergraduate students – providing them the opportunity to explore their interests and talents, learn and practice adult responsibilities, establish lifelong social networks, and complete their undergraduate degrees as a first step towards becoming productive contributors in the workforce and in their communities.

Grants are made to full-time undergraduate students attending MSCHE accredited colleges and universities located in Bucks, Chester, Delaware, Montgomery and Philadelphia counties, as well as the City of Camden, NJ. During the past two fiscal years, the Trust added Rowan University and Rutgers University to our roster of four-year colleges/universities, thereby expanding scholarship assistance to the City of Camden, NJ. 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.

Beginning with the 2016-2017 academic year, the Trust initiated a two-year pilot program for community colleges, technical colleges, and trade schools located in, and serving students from, the same geographic areas defined by the existing program for MSCHE



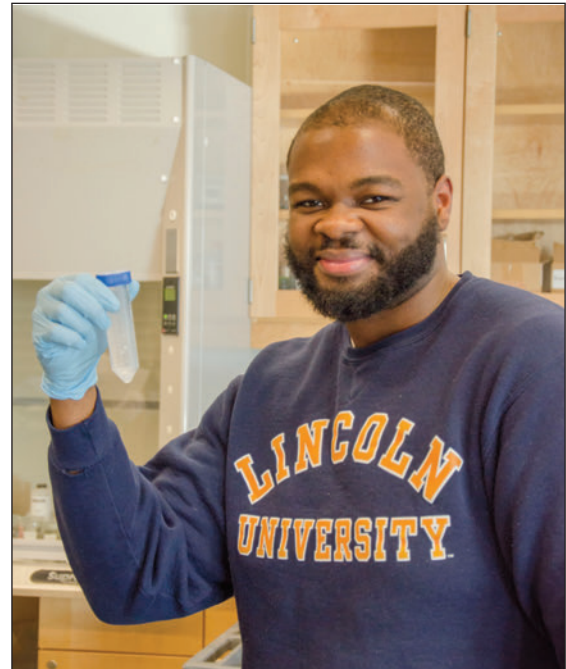
Bryn Mawr College students immersed in their studies.

accredited colleges and universities. The intention of this program is to augment the scope of the Trust's educational funding to encompass those under-resourced students who are unable to attend a four-year college/university or whose career aspirations may not require a four-year degree.

W. W. Smith Scholarship recipients (Smith Scholars) are chosen by the individual institutions based upon the Trust's guidelines. Smith Scholars must be full-time undergraduate students with unmet financial need, who maintain a GPA of 2.5 or better, and are permanent residents of Bucks, Chester, Delaware, Montgomery or Philadelphia counties in Pennsylvania, or the City of Camden in New Jersey.

Smith Scholars have gone on to distinguished graduate schools and have excelled in their careers. The Trust can count among them: scientists, editors, teachers, lawyers, doctors, nurses, dancers, software developers, as well as professionals in many other areas.

Planning for college/university expenses is one of the largest financial projects that a family or individual can undertake. The Scholars Program helps to make these expenses more manageable for talented students throughout the Delaware Valley and the City of Camden, NJ.



A Lincoln University student performs research in the lab.



Lincoln University Smith Trust Scholars with Smith Trust Grant Administrator Brian Jones (second from right) and Wells Fargo Bank representative Betty J. Pettine (right).

Tiffany Tavaréz

Vice President, Community Relations and Senior Consultant, Wells Fargo Northeast Community Relations Team

Tyler School of Art/ Temple University,
W. W. Smith Scholar, Academic Year 2001-2002

In addition to being the first person in her family to attend college, Tiffany Tavaréz was the first person to receive a full-tuition scholarship to Temple University's Tyler School of Art, where she earned her BFA. It is during this time she received additional scholarship support from the W. W. Smith Charitable Trust to sustain her educational endeavors. Tiffany later earned her MA from the University of the Arts. The financial and social support she received during her college experience was the beginning of a significant transition, one where paying it forward was no longer something she did, but rather a way that she lived. Now, through her work and with her mentees – the talented, young future leaders in the region – she is able to rely on their collective impact as the primary source of community leadership and personal inspiration.

Tiffany serves as Vice President of Community Relations at Wells Fargo Bank, where she ensures the Northeast Community Relations team and business line partners are meeting the company's



Holy Family University President Sister Maureen McGarrity, CSFN, with University students.



Smith Scholar Tiffany Tavaréz

corporate responsibility objectives and priorities. She also focuses on creating programs around strategic philanthropy and team member volunteerism, as well as managing signature community initiatives across the five-state region (PA, NY, NJ, DE and CT). Her experience includes working in community relations, philanthropy and development for PECO, Comcast Foundation, Temple University, and the Pew Center for Arts and Heritage.

She has been recognized by numerous organizations, including the Philadelphia Business Journal, LEADERSHIP Philadelphia, IMPACTO, Femme & Fortune, Hispanic Media LLC, United Way of Greater Philadelphia and Southern New Jersey, Friends of the Urban Affairs Coalition, Joan Shepp, and the Philadelphia City Council.

Most recently, Tiffany was awarded the 2018 Emerging Leader Award by the Forum of Executive Women, which includes a year of participation in their formal mentorship program. She was also honored with the Born to Make HERStory Amazing Woman Award by the Office of Councilwoman Blondell Reynolds Brown and the National Youth Foundation during their inaugural Girls Rally. Tiffany Tavaréz serves on Governor Tom Wolf's Pennsylvania Commission for Women, Philadelphia Global Identity Project Advisory Board, Temple Contemporary Advisory Council, and on the Boards of Directors for the Philadelphia Mural Arts Program and Esperanza.

Charles E. Davis

*Assistant Director of Financial Aid,
Chestnut Hill College*

**Chestnut Hill College, W. W. Smith Scholar,
Academic Year 2011-2012**

“I consider myself a lifelong learner and believe that education is a framework for success and advancement. A college education is necessary for new students entering today’s workforce and has several benefits such as job security and continued growth. Education is something that no one can take away from you, and knowledge can always be gained both in and out of the classroom.”

– *Charles E. Davis*



Smith Scholar Charles E. Davis

As a student at Chestnut Hill College, Charles was actively involved as an Orientation Leader, SEARCH Retreat Leader, Yearbook Co-Editor, and a First Year Initiative Peer Leader. He participated in the Wind Ensemble and the Pit Orchestra for the CHC Musical each year as an undergraduate student. Charles was inducted into the Alpha Lambda Delta National Honor Society and received the Jacobs Music Steinway Award at Honors Convocation. He earned his Bachelor of Science in Music Education from Chestnut Hill College and currently holds a Master of Science in Administration of Human Services, graduating with this degree in December 2017.

Charles worked in the Chestnut Hill College Office of Financial Aid year-round as an undergraduate Federal Work-Study student for four years. He had the opportunity to complete two internships with Chestnut Hill College, one with the Dean of Students during the spring of his junior year and the other with the Director of Financial Aid in the fall of his senior year. This exposed him to the field of higher education and solidified his passion for the field. Charles knew instantly that, after completing his undergraduate degree, he would seek employment in higher education. He loves working with college students and feels it is important that all students are given the tools for access and success once they start the journey of a post-secondary education. As a former Smith Scholar, it is apropos that Charles now oversees the awarding process for the W. W. Smith Charitable

Trust Scholarship at his alma mater, Chestnut Hill College.

Charles offered this advice for all undergrads: “Seek knowledge in all things. Whenever you have the opportunity to gain new knowledge or learn about a different perspective, always be open to the experience. Never stop learning in the classroom, never stop learning on the job, and never stop learning in life. Our experiences shape us into well-rounded, holistic beings and contributive members to society. The knowledge that we can obtain is never ending!”

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

Fiscal Years 2015-2017

Four-Year University/College Grants: 65

Low and High Dollar Amounts:
\$30,000 to \$200,640

Two-Year College/Technical College Grants: 15

Low and High Dollar Amounts:
\$25,000 to \$30,000

SCHOLARSHIP FINANCIAL AID PROGRAM

ORGANIZATION	GRANT AMOUNT	
	Fiscal Year 2015/2016 (2016/2017 Academic Year)	Fiscal Year 2016/2017 (2017/2018 Academic Year)
Four-Year Colleges		
Arcadia University	\$72,500	\$79,200
Bryn Mawr College	65,500	71,280
Cabrini University	63,000	71,280
Cairn University	57,000	63,360
Chestnut Hill College	64,500	71,280
Cheyney University	—	52,800
Delaware Valley University	63,500	71,280
Drexel University	130,000	142,560
Eastern University	65,000	73,920
Gwynedd-Mercy University	68,000	76,560
Haverford College	30,000	30,000
Holy Family University	64,500	71,280
Immaculata University	60,000	68,640
LaSalle University	81,000	89,760
Lincoln University	51,000	58,080
Moore College of Art & Design	63,500	71,280
Neumann University	62,500	71,280
Peirce College	44,000	50,160
Penn State Brandywine	41,500	47,520
Pennsylvania Academy of the Fine Arts	65,500	73,920
Philadelphia University	73,000	81,840
Rosemont College	52,500	58,080
Rowan University	111,000	116,160
Rutgers University	65,500	73,920
St. Joseph's University	91,000	100,320
Temple University	190,000	200,640
University of Pennsylvania	30,000	30,000
University of the Arts	73,500	81,840
University of the Sciences in Philadelphia	74,500	81,840
Ursinus College	74,500	84,480
Villanova University	94,000	102,960
West Chester University	110,000	121,440
Widener University	80,000	87,121
Four-Year College Totals	\$2,332,000	\$2,626,081
Two-Year and Technical Colleges		
Bucks County Community College	25,000	25,000
Camden County College	25,000	25,000
Community College of Philadelphia	25,000	25,000
Delaware County Community College	25,000	25,000
Harcum College	—	25,000
Manor College	30,000	30,000
Montgomery County Community College	25,000	25,000
Williamson College of the Trades	30,000	30,000
Two-Year College/Technical College Totals	\$185,000	\$210,000
FISCAL YEAR TOTALS	\$2,517,000	\$2,836,081



BASIC NEEDS PROGRAM

IMPROVING ACCESS TO FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS IN NEED

The W. W. Smith Charitable Trust seeks to ensure that the basic necessities of life are available for children and older adults in our community who do not have adequate access to food, clothing or shelter. By investing in the efforts of partnering nonprofits, it is our sincere hope that those in need of help can immediately receive the basic needs assistance necessary and ultimately experience a better quality of life.

For more than four decades, the Trust has funded projects and programs of nonprofit organizations from the five-county Greater Philadelphia area and the City of Camden, New Jersey. The extent and severity of addressing human basic needs have eminently increased in recent years. With this intensified need, we look to fund organizations that offer smart, fiscally sound, and dynamic approaches to solving ever-growing community problems. The Trust remains committed to providing focused, yet flexible, grant funds needed to employ various efforts for addressing immediate basic needs among the thousands of seniors, children and families impacted each year.

One often hears Executive Director Robert A. Emberger, D.Min. say that The Whosoever Gospel Mission (the Mission) provides homeless men a hand-up and not just a handout. Of course, compassionately handing out food and clothing to a hungry and homeless man surviving in Philadelphia is a needed and noble effort in the short-run. However, if we can help



A Whosoever Gospel Mission resident looks forward to a fresh start through the Mission's New Life Program.

a homeless man secure a job and become self-supporting so he can buy his own food and clothing, we help facilitate new possibilities for greatly improved life circumstance in the long-run. Many years ago the Mission took on this cause. As a result, hundreds of homeless men are now equipped with the life skills and resources necessary for a fresh start and a better quality of life.

Homelessness, drugs and alcohol really take a toll upon the men who come to the Whosoever Gospel Mission. When a man first arrives at the Mission, he looks like he is carrying the weight of the whole world upon his shoulders. The Mission's counselors welcome the new resident into the New Life Program, and offer



Homeless men share friendship and a nutritious meal during The Whosoever Gospel Mission's Thanksgiving Day Feast.

encouraging words that God can give him a new life, a fresh start, and a new beginning. Next, Mission staff provides the newcomer with clean clothes and underwear, new bedding, toiletries, and an opportunity to shower and groom before partaking in a nutritious meal. An amazing transformation begins to take place as all of these things happen – the new resident begins to believe that a better day has arrived. He feels safe and able to experience a good night's sleep for the first time in a long time. This is just the beginning of the New Life Program, typically six to eight months in duration. With a full array of wraparound supports and services, such as counseling, tutoring, life skills classes, job readiness training, drug and alcohol rehabilitation, access to medical care, case management, and daily chapels, the homeless men who come to the Mission begin to rebuild their lives one brick at a time.

- In the last program year, 196 men walked through the Whosoever Gospel Mission's doors into a warm and inviting place to call home – one in which they could find all the resources needed to step out of homelessness and into their own permanent housing.
- Over 75,000 nutritious meals and snacks were served, without charge, to the men living at the Mission.
- Thousands of articles of used clothing, new underwear, and new socks were distributed.
- 45 men experiencing homelessness obtained jobs while in the New Life Program, achieving a major step towards their goal of successful, independent living.

The Trust is proud to have helped provide for the basic needs of food (three full meals plus snacks daily), clothing, and shelter (bedding, maintenance, repairs, heat, electricity, etc.) for the older adult residents who are living at the Whosoever Gospel Mission shelter during a transitional period in life. These funds become even more needed as older men tend to stay longer and require additional supports in order to obtain a job and/or maintain their health as best as possible.

Many organizations help low-income families obtain and retain housing, but only a few help them turn their housing into functional homes. One result of this is a phenomenon called child bedlessness. Hundreds, if not thousands, of children in the Greater Philadelphia area are forced to sleep on the floor, on makeshift beds (sofas, air mattresses, etc.), or with their parents. Many of these children are transitioning from shelters or other temporary housing; some are recovering from catastrophes such as fires or floods; and others have been sleeping without a bed their entire lives.

Uncomfortable sleeping arrangements like these often cause poor sleep, which puts children at risk of developing a wide range of short- and long-term health problems, such as diabetes and hypertension. Poor sleep can also impair children's cognitive and social-emotional function, and consequently, their academic performance.

One House At A Time's (OHAAT) Beds for Kids program delivers beds, bedding, and tools that



Above: All smiles and looking forward to a good night's sleep in a new bed of her own from OHAAT's Beds for Kids program.

At left: One House at a Time staff and volunteers deliver beds and bedding directly to the homes of children in need.

encourage healthy bedtime habits directly to the homes of children in need. Every Beds for Kids recipient receives a hypoallergenic, bed bug resistant twin-size bed, a sheet set, a blanket, a pillow, a toothbrush, a stuffed animal, and several age-appropriate books. Recipients also receive educational messages about healthy sleep habits and an informational handout about preventing and treating bed bug infestations. With beds of their very own, the children can get the quality and sufficient sleep they need to thrive.

The Journal of Clinical Sleep Medicine published a study that OHAAT conducted in partnership with St. Joseph's University and the Children's Hospital of Philadelphia. The study found that children in OHAAT's Beds for Kids program with the sleep education component slept an average of 30 more minutes each night and had fewer distractions in their bedroom.

OHAAT purchases beds and bedding in bulk, and partner organizations donate bedding and bedtime items through collection drives. They turn every dollar donated into more than five dollars of value by leveraging volunteers and partnerships with businesses and organizations such as Tempur-pedic, PragmaBed, Target, and Cradles to Crayons.

Over the last five years, the Beds for Kids program has grown from serving 350 children and youth each year to more than 1,050, which is a 300

percent increase. With a grant from the W. W. Smith Charitable Trust, OHAAT was able to purchase bed frames, mattresses, sheet sets, blankets, and pillows for 316 children and youth referred by various social service agencies that are approved to participate in OHAAT's Beds for Kids Basic Program.

While a safe, comfortable and affordable place to lay one's head every night is of the utmost importance, the rest of life's necessities do not just spontaneously appear. When it comes to hunger, senior citizens are always among the most vulnerable, with many facing the difficult choice of buying food or medication. According to a report on hunger in Philadelphia conducted in 2015 by the Public Health Management Corporation, greater than 32,000 seniors reported that they cut out meals due to a lack of money. Comparatively, more than 73 percent of residents in Presby's Inspired Life sponsored Affordable Housing communities report annual incomes below \$10,000 a year.

The Cupboards of Care program, started by Presby's Inspired Life in 2016, is an initiative that supplies \$100 grocery store gift cards to provide financial support for individuals across their Affordable Housing communities to help mitigate food insecurities and enable residents to purchase healthy food. In its first year, 58 residents across 31 Presby's Affordable Housing communities were

served by Cupboards of Care. Each received approximately \$424 in grocery gift cards for the year, divided into quarterly disbursements, which allowed for more thoughtful use throughout the year in combination with other public benefits (e.g. SNAP).

Presby has partnered with FLIK Lifestyles, a senior living dining services provider, to take Cupboards of Care beyond just providing gift cards. A nutritionist with FLIK has been holding educational workshops at the Affordable Housing communities to share healthy recipes and discuss the benefits of eating lean meats, fruits, and vegetables.

The vast majority of participants in the Cupboards of Care program said that being able to purchase food items they otherwise would not be able to afford has helped them make healthier eating choices. Several even reported they have lost weight and lowered their blood pressure. The decision to maintain a healthy lifestyle is now much easier for the residents and there is a greater feeling of accomplishment in making those healthy choices.

With a grant from the Trust, Presby's Inspired Life is helping residents fill their empty cupboards with healthy, nutritious food that helps improve habits and lifestyles through the Cupboards of Care program.

The Trust is greatly encouraged by the efforts of The Whosever Gospel Mission, One House at a Time, Presby's Inspired Life, and other partners awarded through the Basic Needs Program over the years. We remain firmly committed to continue our investments in organizations that are always there to provide a safety net for the vulnerable children, families, and older adults who need them the most.

Fiscal Years 2015-2017
Food, Clothing and Shelter Grants: 138
Low and High Dollar Amounts:
\$5,000 to \$67,500



As a result of the Cupboards of Care program, Presby's Grace Court residents are living healthier lifestyles.

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
Action Wellness	Food/Clothing/Shelter	\$ —	\$ 23,200
Advocates for Homeless and Those in Need	Shelter	—	12,000
Aid for Friends	Food	25,600	—
Bebashi Transition to Hope	Food	—	7,000
Bernardine Center	Food/Clothing/Shelter	—	24,800
Bethesda Project	Food/Shelter	25,000	—
Blessed Virgin Mary Parish	Food/Shelter	—	6,000
Boys & Girls Clubs of Philadelphia	Food	45,000	18,000
Bridge of Hope	Shelter	—	25,000
Broad Street Ministry	Food/Clothing	50,000	50,000
Bucks County Housing Group, Inc.	Food/Shelter	—	40,000
Camilla Hall Nursing Home/Sisters, Servants of the Immaculate Heart of Mary	Shelter	—	50,000
Camphill Soltane	Shelter	—	8,000
Camphill Village Kimberton Hills, Inc.	Food/Clothing/Shelter	—	28,500
The Career Wardrobe	Clothing	—	10,000
CARIE/Center for Advocacy for the Rights and Interests of the Elderly	Shelter	—	9,000
Carson Valley Children's Aid	Food	67,500	—
Cathedral Kitchen	Food	—	30,000
Center for Family Services, Inc.	Shelter	18,000	—
Center in the Park	Food	13,000	—
Chester County Food Bank	Food	—	40,000
Chester County Women's Services	Food/Clothing	—	9,000
Chester Eastside, Inc.	Food	—	30,000
Chestnut Hill Meals on Wheels	Food	—	6,000
Christ's Home	Food/Clothing/Shelter	45,000	—
The Church Farm School	Food/Shelter	—	65,000
Covenant House of Pennsylvania	Food	52,500	—
Cradle of Hope, Inc.	Shelter	10,000	—
Cradles to Crayons	Clothing	—	40,000
The Devereux Foundation	Clothing	—	28,000
Dignity Housing	Shelter	24,000	—
The Domestic Abuse Project of Delaware County, Inc.	Shelter	12,500	—

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
Drueding Center	Food/Clothing	\$ —	\$ 26,000
ElderNet of Lower Merion and Narberth	Food	—	8,000
Energy Coordinating Agency of Philadelphia, Inc.	Shelter	22,000	22,000
Episcopal Community Services	Food	58,500	—
Face to Face	Food	35,000	—
Family Promise of Southern Chester County	Food/Shelter	—	13,500
Family Service Association of Bucks County	Food/Shelter	—	35,200
Family Services of Montgomery County	Food	—	20,575
Family Support Services, Inc.	Food	—	16,000
Food Bank of South Jersey	Food	—	67,500
The Food Trust	Food	—	25,000
Friends Association for Care and Protection of Children	Food/Shelter	17,500	—
Germantown Avenue Crisis Ministry	Shelter	45,000	35,000
Golden Slipper Center for Seniors	Food	20,000	—
Good Neighbors Home Repair	Shelter	28,000	30,400
Good Works, Inc.	Shelter	30,000	27,000
Greater Harleysville and North Penn Senior Services	Food	29,000	—
Greensgrow Philadelphia Project, Inc.	Food	22,800	—
Holy Family Home – Little Sisters of the Poor	Food/Shelter	—	60,000
Housing Partnership of Chester County, Inc.	Shelter	10,000	10,000
Inter-Faith Housing Alliance	Food/Shelter	—	20,000
JEVS	Shelter	17,500	24,000
Jewish Family and Children's Services	Food/Shelter	40,000	—
Jewish Relief Agency	Food	25,000	—
Laurel House	Food/Clothing/Shelter	—	15,000
Lighthouse Youth Center	Food	—	10,000
Lily's Hope Foundation	Clothing	5,000	—
Living Beyond Breast Cancer	Food	—	8,050
The Lord's Pantry of Downingtown	Food	—	40,000
Lutheran Children and Family Service	Food/Shelter	44,000	—
Lutheran Settlement House	Clothing/Shelter	—	14,850

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
MANNA	Food	\$ 45,000	\$ 45,000
Manna on Main Street	Food	35,000	20,000
Maternity Care Coalition	Food/Clothing/Shelter	50,000	—
Mattie N. Dixon Community Cupboard, Inc.	Food	10,000	—
Meals on Wheels of Chester County, Inc.	Food	—	15,500
Mental Health Association of Southeastern Pennsylvania	Food/Clothing	—	36,115
Miriam and Robert M. Rieder House, Inc.	Food	17,000	—
Mitzvah Circle Foundation	Clothing	15,000	35,000
Montgomery County Foundation Inc.	Food/Shelter	25,000	—
Mothers' Home	Food	30,000	—
Net Community Care	Food/Clothing/Shelter	15,000	—
Norristown Ministries, Inc. Hospitality Center	Food/Shelter	—	10,500
Northwest Philadelphia Interfaith Hospitality Network	Food/Clothing/Shelter	33,500	28,000
Nutritional Development Services	Food	—	50,000
One House at a Time	Shelter	25,000	—
The Open Link	Food/Shelter	25,000	—
Operation Warm	Clothing	25,000	—
Oxford Area Neighborhood Services Center	Food/Shelter	8,500	—
Oxford Area Senior Center	Food	5,000	—
Parkesburg Point Youth Center	Food	22,000	—
The Pathway School	Food/Clothing	—	10,400
Penn Asian Senior Services	Food	40,000	—
Pennsylvania Home of the Sparrow	Shelter	—	15,000
People's Emergency Center	Shelter	—	40,000
Philabundance	Food	—	45,000
Philadelphia Corporation for Aging	Food/Clothing/Shelter	—	10,000
The Philadelphia Project	Shelter	15,000	—
Presby's Inspired Life	Food	25,000	—
Project H.O.M.E.	Food	20,000	—
Project Outreach	Shelter	8,500	—
Raymond and Miriam Klein JCC/Kleinlife	Food	40,000	—

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
Rebuilding Together Philadelphia	Shelter	\$ 50,000	\$ —
Resources for Human Development	Food/Clothing/Shelter	43,500	29,740
Ronald McDonald House of Southern New Jersey	Food/Shelter	15,475	—
Roxborough Presbyterian Church	Food	5,000	10,000
Saint John's Hospice/Catholic Social Services	Food/Clothing/Shelter	—	56,000
Saint Joseph's Carpenter Society	Shelter	—	40,000
Saint Vincent de Paul Society/ Sacred Heart Conference	Food/Clothing/Shelter	5,000	7,500
Senior Adult Activities Center of Montgomery County	Food	—	25,600
Senior Adult Activity Center of the Phoenixville Area	Food	11,700	—
Senior Community Services	Food	—	30,000
St. Francis & St. Vincent Homes	Shelter	62,000	—
St. Ignatius Nursing Home	Shelter	—	50,000
St. Joseph Villa	Shelter	50,000	40,000
St. Mary's Franciscan Shelter for Families	Shelter	—	16,850
St. Peter's Church Food Cupboard	Food	20,000	—
Surrey Services for Seniors	Food	50,000	—
Trinity Memorial Church	Food/Shelter	20,000	—
Turning Points for Children	Food	35,000	45,000
Utility Emergency Services Fund	Shelter	50,000	50,000
Veterans Multi-Service Center, Inc.	Food/Shelter	10,000	—
West Chester Area Senior Center	Food	—	24,500
West Chester Food Cupboard	Food	28,000	—
The Whosoever Gospel Mission and Rescue Home Association of Germantown Avenue	Food/Clothing/Shelter	23,750	20,000
Why Not Prosper, Inc.	Clothing/Shelter	5,000	—
Women Against Abuse, Inc.	Food	—	40,000
FISCAL YEAR TOTALS		\$1,856,405	\$1,932,780



PHILADELPHIA MARITIME PROGRAM

The Independence Seaport Museum, founded in 1961 as the Philadelphia Maritime Museum, endeavors to deepen the understanding, appreciation and experience of the Philadelphia region's waterways. Located in the Penn's Landing complex along the Delaware River in Philadelphia, the Museum connects communities and visitors to the local watershed through interactive exhibitions, educational maritime-influenced programming, and fun on-water experiences.

Every year, the Museum serves over 20,000 children and students from kindergarten through high school, with a variety of hands-on, fun and educational maritime-related activities. The programs emphasize history, STEAM (science, technology, engineering, arts, math), maritime skills, appreciation for natural areas around the city, and experiential learning activities involving local waterways.

Smith Trust grants enabled the Museum to increase its educational staff, equipment, and materials to enhance and grow the following programs during fiscal years 2015-2017:

- SAILOR (Science and Arts Innovative Learning on the River) – an in-school and after-school program where underserved youth in grades 7-12 explore and apply crosscutting STEAM concepts to the process of designing, building and launching traditional wooden boats. More than 300 students benefited, and 93% expressed interest in pursuing a future career in science, technology, engineering and/or math.

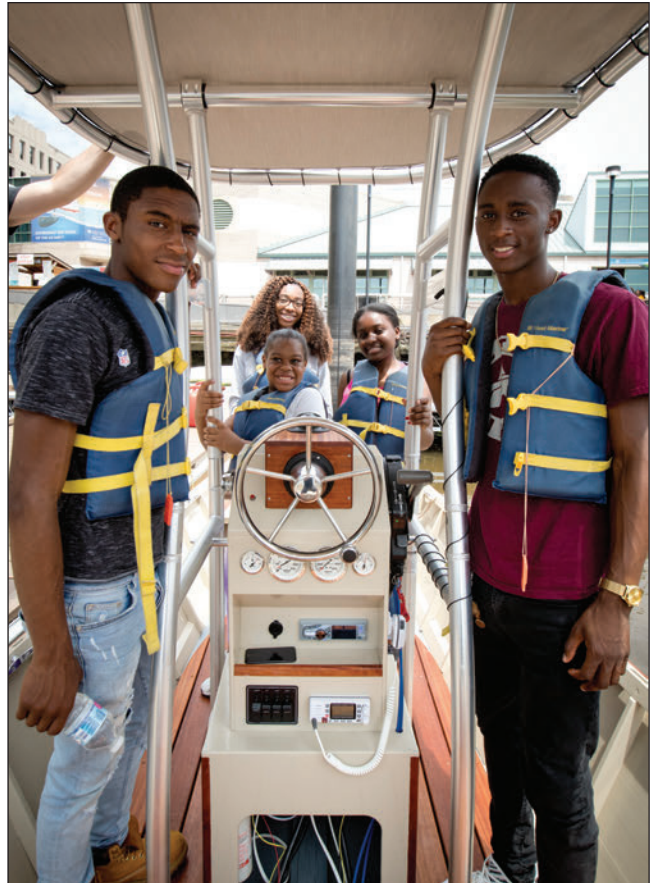


Independence Seaport Museum SAILOR students built and launched the JAWN, a 19' Big Ben Garvey with bow and stern transoms, along with a 40 horsepower outboard motor.

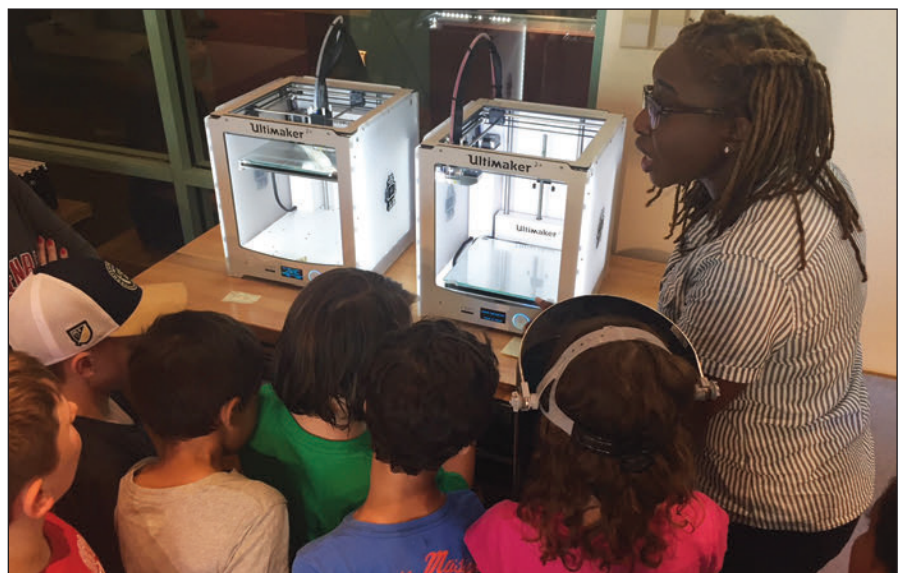
- River Stewards Apprenticeship – a work readiness and community service experience for high school students who participated in SAILOR and wish to explore related college and career opportunities. Each participant receives a stipend. Four students were supported through Smith Trust grants.
- Makerspace – a newly created, innovative interactive space that allows students to design, experiment, build and invent as they engage in science and engineering concepts. Makerspace is outfitted with cutting-edge equipment, including: 2D and 3D printers, a mini laser engraver, a computer-controlled cutting machine, and an automated laser cutter. It is a bright, inviting space, accessible as soon as students enter the Museum.

The Smith Trust is pleased to support Independence Seaport Museum’s ongoing efforts to engage youth most in need and otherwise unable to access maritime education experiences.

Fiscal Years 2015-2017
Philadelphia Maritime Grants: 5
Low and High Dollar Amounts:
\$25,000 to \$75,000



River Steward Apprenticeship students climbing aboard as they gear up to explore the Delaware River.



STEAM Educator Joy Ude shows campers how the 3D printers work.

PHILADELPHIA MARITIME GRANTS

ORGANIZATION	PROJECT	GRANT AMOUNT	
		Fiscal Year 2015/2016	Fiscal Year 2016/2017
Independence Seaport Museum	To support the expansion and evaluation of their SAILOR (Science and Arts Innovative Learning on the River) educational program, which includes lessons centered on the process of traditional wooden boat design construction.	\$ 75,000	\$ —
Philadelphia Wooden Boat Factory	To support the expansion of the Boat Build and Sail program with one-time infrastructure expenses related to securing the space for, and outfitting, their new sail loft, and for materials needed for their core boat building activities.	40,000	—
Philadelphia Wooden Boat Factory	To defray some of the costs associated with sustaining and expanding their Boat Build and Sail Program, which currently offers year-round apprenticeships in traditional wooden boat building and seamanship to low-income youth ages 14-21.	—	46,000
UrbanPromise Ministries, Inc	To support the cost of supplies and materials for nine boats built by approximately 80 students. To expand their wooden boat program by doubling the number of middle school students in the shop and enhancing the historical, environmental and STEM curriculums.	25,000	—
UrbanPromise Ministries, Inc	To support the cost of supplies and materials for two 25' voyager canoes, a 30' dragon boat, and 100 model boats built by approximately 80 students. To fund a portion of the rent to house the boat building program, and four maritime experimental trips for students.	—	33,240
TOTAL PHILADELPHIA MARITIME GRANTS		\$140,000	\$79,240

GRANTMAKING PROGRAMS

The W. W. Smith Charitable Trust is a private foundation established by William Wikoff Smith with a mission to help organizations and individuals achieve their goals, hopes and dreams. The Trust awards grants in four main areas:

- *Medical Research:* grants to institutions pursuing impactful research advances in the areas of heart disease, cancer, and AIDS.
- *Basic Needs:* grants for nonprofits that assist those who do not have adequate access to food, clothing or shelter.
- *Scholarship Financial Aid:* grants for colleges and universities to offset educational expenses for full-time undergraduate students.
- *Maritime Education:* grants for nonprofits to teach maritime skills and/or to promote public awareness, appreciation, and access to local waterways (e.g. Delaware River, Philadelphia waterfront).

The Trust prioritizes grant requests that benefit the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ.

GENERAL POLICIES

Below are policies that are generally applicable across all W. W. Smith program areas. However, be sure to review the specific application and award requirements for the grant program of interest to your organization.

Eligibility

- Nonprofit organizations in existence for more than one (1) year and tax-exempt under Section 501(c)(3) of the Internal Revenue Code are eligible to apply. The Trust does not make grants to private foundations, Type III supporting organizations, YMCAs/YWCAs, child day care programs, for-profit businesses, or individuals.
- The organization must have an established service location within the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ.
- Applicants are limited to one (1) proposal at a time and one (1) grant per calendar year.

Application and Selection

- The Trust accepts grant applications year-round. Each program area has a specific application and deadline(s).

- The Trust considers many factors during grant review, including: organization mission and history, fiscal management and transparency, leadership and staff, project plan and experience, potential community impact, budget, third-party reviews and ratings, collaborations, and prior grant performance (when applicable).
- W. W. Smith's Trustees make final award decisions concerning all qualified applicants.

Use of Funds

- Grants are typically awarded for a one (1) year term. Any unspent funds must be returned.
- Funds must be used for the purposes and budget approved by the Trust and as allowed by IRS charitable use policy.
- The Trust does not award funds for general operating expenses, capital campaigns, memberships, fundraising, sponsorships, salaries (with the exception of medical research or maritime projects), planning, computers, vehicles, or retroactive funding.
- The Trust reserves the right to have funds returned immediately if (a) your tax exempt status changes, (b) you fall out of compliance with regulations, certifications, licensures, etc.

required to carry out project activities, or (c) funds are not used in accordance with the purposes and budget approved for the grant award.

Reporting and Publicity

- A final report is required at the end of the grant period and should include (a) narrative

report (e.g. project goals, activities, impact, challenges/findings), and (b) financial report (detailed use of funds, most recent audit).

- The Trust encourages public announcements of grants by way of news media, social media, email distribution, and/or similar outlets. Any such announcements must be shared with the Trust prior to distribution.

MEDICAL RESEARCH

The Trust awards grants for basic medical research primarily related to heart disease, cancer, and AIDS. Funding is limited to nonprofit institutions such as universities, hospitals, and research centers located in the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ. Scientists and research faculty with appointments at the aforementioned institutions are encouraged to apply through their associated institution.

The Trust identifies and funds research projects that are unique and meritorious. We invest in promising researchers having the potential to attract larger-scale awards (e.g. NIH, NSF, AHA) subsequent to Trust support.

Research proposals are peer reviewed by a medical advisory committee comprised of prominent scientists at institutions located outside our geographic funding area. These reviews help guide Trust funding towards projects capable of having a direct influence upon the fight against heart disease, cancer, and AIDS.

Eligibility and Use of Funds

- 501(c)(3) nonprofit research organizations are eligible to apply.
- The organization must be located in the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ.

- Funds must be used for basic medical research in the areas of heart disease, cancer, or AIDS.
- Grants are awarded for a one (1) year term. Awards typically range from \$100,000 - \$125,000 (including indirect costs).
- No funds are awarded solely for equipment.
- A maximum of one (1) proposal per parent organization may be submitted in each granting category regardless of the number of EINs available under the organization.
- Unused grant funds must be returned to the Trust promptly. Please contact the Trust for guidance before submitting any refund.
- Copies of all published material relevant to a proposed research project must be made available to the Trust both before and after a grant is made.

How to Apply

This is a general outline of the application process. Refer to the medical research application on the Trust's website for complete details and final proposal submission.

- Download the password-protected medical research application from the medical section of the Trust's website. The senior official for the research function, or the research development assistant, should be able to obtain and provide the password.
- Proposals must be submitted with a letter of endorsement from the institution's

MEDICAL RESEARCH (CONTINUED)

senior official for the research function. Unendorsed protocols or proposals not following the Trust's research application will not be considered.

- Applications must be for the work of individual investigators and not for the general work of research centers.
- Applications must include a lay summary of the research objectives and potential future applicability to a clinical setting.
- Requests to support students, fellows, and postdoctoral candidates must be supported by curriculum vitae.
- Proposal budgets should include personnel, equipment and supplies needed to carry out the proposed objectives. F&A is allowed and limited to 10 percent.
- Duplicates of the submitted research to other sources must be acknowledged within the Trust's application. Contingent funding approvals may be made. Trust funds may be reserved until the status of duplicate or related research proposals is known.
- Applicants must divulge all outside sources of funding (current and pending) whether federal, state or private.
- Post-award, lay-language narrative progress reports and detailed financial reports are required to be submitted to the Trust within 60 days of completion of the project. If a no-cost time extension is approved during the initial project year, narrative and financial reports are also required within 60 days of completion of the extension period.
- Applications, including 501(c)(3) tax determination letter and most recent IRS 990, must be submitted electronically via email. One (1) hard copy of the complete application, including audited financial statements, must be submitted to the Trust's office. There is no need to submit a hard copy of the 990. See application for complete details.
- Applications must be received in the Trust's office by the deadline noted below for consideration at the corresponding Trustee meeting. If the deadline falls on a holiday or weekend, applications are due on the prior business day.

Application Deadline

July 15 by 4:30 p.m. EST

Decision and Notification

October/November

SCHOLARSHIP PROGRAM

Proposals for grants to MSCHE two-year and four-year accredited colleges and universities are by invitation only and must be received by April 1. Funding will be awarded at the May Trustees meeting. Grants must be used for student scholarships (covering only tuition, room, board and/or books) for those who meet the eligibility requirements as detailed in the Smith Scholars Program Guidelines.

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 or Philadelphia counties, or the City of Camden, NJ. Out-of-state students (with the exception of the City of Camden, NJ) 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.

Recipient institutions are visited once every two years by the Trust staff. Grant funds cannot be used for endowment, equipment, construction, capital campaigns, annual giving, or other purposes.

BASIC NEEDS PROGRAM

FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

The Trust awards grants to nonprofits that provide direct assistance to those in our community who are in need of food, clothing or shelter. We prioritize requests that benefit disadvantaged and vulnerable children and older adults who reside within the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ. The Trust monitors basic needs trends in the region to help us reassess and adjust our grantmaking. We encourage you to contact the Trust for a preliminary review of your request prior to applying.

Eligibility and Use of Funds

- 501(c)(3) nonprofit organizations in existence for more than one (1) year are eligible to apply.
- The organization must have an established service location within the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ.
- Funds must be used to address food, clothing and/or shelter needs of children or seniors living within the Trust's targeted geographic region. Allowable uses of grant funds include:
 - (a) *Food*: perishable and nonperishable food, produce, baby food and formula, prepackaged or prepared meals, related supplies or equipment deemed essential for food distribution program, grocery gift cards and vouchers;
 - (b) *Clothing*: direct purchase of clothing for children or older adults, clothing gift cards or vouchers;
 - (c) *Shelter*: home furniture for clients (e.g. beds, cribs), housing payments or utility bills paid directly to vendor, materials for home repair programs, supplies or items (e.g. furniture, equipment, appliances)

deemed essential for the provision of emergency shelter, transitional housing, or other residential programs for children or seniors;

- (d) *Facilities Improvements*: facilities renovations or repairs that directly impact clients' ability to access and benefit from a food program (e.g. pantry) or housing services (e.g. emergency shelter, transitional housing).
- The further away any request is from direct provision of literal food, clothing or shelter benefiting children or seniors, the less likely funding will be granted.
 - Grants are awarded for a one (1) year term. Organizations that receive three (3) consecutive years of funding must then wait two (2) years before being eligible to reapply. We make this determination based on the calendar year of your notice of award.
 - The minimum award is \$5,000. There is no maximum award limit. Grants typically range from \$10,000 to \$40,000.

How to Apply

- Contact us to confirm you have the most recent Basic Needs (Food, Clothing and Shelter) application form. You must submit the completed form and the required attachments (e.g. 501(c)(3) tax determination letter, most recent IRS 990 and audited financial statements, operating and project budget, board list). See application for complete details.
- Applications must be received in the Trust's office by the deadlines noted below for consideration at the corresponding Trustee meeting. If a deadline falls on a holiday or weekend, applications are due on the prior business day.

Application Deadline

June 15 by 4:30 p.m. EST

December 15 by 4:30 p.m. EST

Decision and Notification

Fall Trustee Meeting (September/October)

Spring Trustee Meeting (March/April)

PHILADELPHIA MARITIME PROGRAM

Maritime grants provide funding support to nonprofit organizations in the Philadelphia Delaware River area for maritime educational activities designed to increase awareness of local waterways, develop an appreciation for the maritime heritage of Philadelphia, or teach basic or advanced maritime skills. Grants are available to support on-going maintenance and preservation of the tall sailing ship *Gazela*, which is currently under the care of the Philadelphia Ship Preservation Guild.

Eligibility and Use of Funds

- 501(c)(3) nonprofit organizations in existence for more than one (1) year are eligible to apply.
- The organization must have an established service location within the five-county Greater Philadelphia region (Bucks, Chester, Delaware, Montgomery and Philadelphia counties) or the City of Camden, NJ.
- Grants are awarded for a one (1) year term.

How to Apply

- Contact the Trust to confirm you have the most recent Maritime Program application form. You must submit the completed form and the required attachments (e.g. 501(c)(3) tax determination letter, most recent IRS 990 and audited financial statements, operating and project budget, board list). See application for complete details.
- Proposals are accepted on a continuous basis and reviewed at the next regularly scheduled Trustees meeting following the date of submission.
- Applicants are limited to one (1) proposal at a time and one (1) grant per calendar year.