

THE **W. W. SMITH**

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**CHARITABLE  
TRUST**

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

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**JULY 2017 – JUNE 2020**

**REPORT**



## THE W. W. SMITH CHARITABLE TRUST

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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 needed a boost to achieve their goals in life.

Some are born to lead. Bill Smith was one such person. His interests were varied from business, to sailing, to 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 \$241 million has been distributed, continuing his legacy of responsible citizenship by giving hope to those who are working to overcome difficult circumstances.

# CELEBRATIONS!

The Smith Trust enjoyed several celebrations over the past three fiscal years. These were wonderful gatherings where we enjoyed good times with some of our institutional partners while celebrating progress being made toward our collective vision for a healthier and happier Greater Philadelphia community. Of the events we attended, we wanted to highlight three: the American Heart Association (AHA) Heart Ball, The W. W. Smith Chairperson Dinner, and the annual Woman One Award ceremony.



*Deborah J. McKenna, Emeritus Trustee Mrs. Mary L. Smith, Trustee Louise A. Havens, and Dr. Jonathan Epstein, W. W. Smith Professor of Cardiovascular Research at Penn Medicine, at the 63rd Annual Philadelphia Heart Ball.*

## **AHA Heart Ball**

Our Founding Trustee, Mrs. Mary L. Smith, was presented with the AHA Cooper Award at the 2020 American Heart Association Heart Ball event. Award recipients are selected by medical research investigators who typically choose a peer who has made significant contributions to the scientific community toward discoveries that help prevent, reduce or cure heart diseases. Mrs. Smith was honored to be the first philanthropist to be nominated for this award.

When asked why she was selected, Dr. Jonathan Epstein, Executive Vice Dean, Chief Scientific Officer, and William Wikoff Smith Professor of Cardiovascular Research at Penn Medicine, noted that Mrs. Smith and the Trust have been pivotal in making investments in researchers during the earlier stages of their careers, making it possible for them to conduct experiments needed to eventually attract funding from AHA and the National Institutes of Health.



*Trustee Louise A. Havens, W. W. Smith Woman One Scholar Elizabeth Centurion, Trustee Betty Pettine, and Grant Administrator Brian Jones at the 17th Annual Woman One Award Ceremony.*

In addition to the award, we were happy to see the variety of people who supported AHA and the wonderful work they are doing, both in terms of research and capacity building to help community-based organizations prevent heart disease in practical ways.

### **The W. W. Smith Chairperson Dinner**

Since 1998, the Trust has supported nine named chairpersons and professorships at partnering university colleges of medicine. To celebrate 20 years of making these special awards, we invited all recipients to join us for our first W. W. Smith Chairperson Dinner.

It was a great evening that included medical researchers getting to know one another, sharing about their respective interests, and many laughs. We also enjoyed a special presentation on Benjamin Rush by Stephen Fried, an award-winning journalist and best-selling author who teaches at Columbia University and the University of Pennsylvania. We all learned intriguing details about Rush's pioneering efforts to expand medical access for those in need in the 1800s. With that in mind, the Trust is pleased to support the current efforts of the chairpersons and professors who are active in research and inspiring future generations of medical scholars and practitioners.

### **Woman One Award**

The Woman One Award and Scholarship Fund annually honors a woman of exceptional leadership and raises tuition funds for talented underrepresented women studying medicine at Drexel University who are committed to practicing medicine in underserved communities.

Through this effort, the Trust has supported scholarships for three medical school students since 2013. Two have since graduated, and the most recent recipient is entering her third year of medical school. She has excelled in her studies and is now working directly with patients during the clinical rotation portion of her education. Each year, we have looked forward to attending the Woman One Award ceremony. It gives us the opportunity to celebrate the scholarship recipients and learn more about the Institute for Women's Health and Leadership and Drexel's efforts around diversity and inclusion in medical education. The common theme among scholarship recipients is wanting to ensure equal access to quality healthcare, particularly in communities where there are disparities.

We are impressed with, and inspired by, the W. W. Smith Woman One Scholars and all the others who have committed to improving health outcomes in communities where there is great need.



# REVIEW OF THE PAST THREE FISCAL YEARS

Since its inception, supporting basic needs for the most vulnerable, higher education scholarships for undergraduate students, maritime education for children and youth, and basic medical research have been at the forefront of the Trust's activities. Nonprofit leaders and staff, researchers, students, and families we encounter during community visits all echo how helpful it is for a foundation to remain steadfast in its mission for over 40 years.

The effects of the COVID-19 pandemic upon millions of households further underscores the importance of the Trust's enduring commitment to its core philanthropic interests. Many households could not access food or keep up with housing expenses. College students and their families struggled to pay for tuition. Medical researchers, particularly those with hospital appointments, faced many uncertainties due to institutional deficits. Fortunately, the Trust's grant programs were already aligned with what many of our grantees noted as the highest needs in the community during the height of the pandemic. The Trustees, advisors, and staff agreed to stay the course – prioritizing funding to sustain the efforts of nonprofits we know well. The Trust also expanded its support to include several newly discovered organizations that are doing great work for neighbors in need. In total, the Trust awarded \$4,182,813 to 95 grantees benefiting thousands of Greater Philadelphia residents during the initial months of the pandemic (March – June 2020). We appreciate and applaud the courage, creativity, hard work, and effectiveness of the individuals who staff the institutions we support.

Thanks to strong financial management, the Trust continues to achieve its goal of growing the value of our portfolio with stable, high-performing assets, and safe holdings. Assets were valued at \$184,148,975 by year-end June 30, 2020, an increase of 11% since 2017. The Trust, with the prudent counsel of expert advisors, has been fortunate to have the benefit of consistent and excellent stewardship at all levels. This made it possible to award \$23,428,008 in grants between July 2017 through June 2020, bringing total distributions made since 1977 to \$241,035,804.

## **Basic Needs**

Strengthening the basic needs safety net for Greater Philadelphia households continues to be a top priority for the Trust. The Basic Needs Program continues to evolve in response to shifts in community diversity; changes in how households are requesting and accessing resources; and new approaches by nonprofits, foundations, and government departments committed to improving quality of life outcomes for residents. Among the hundreds of grants awarded, a significant amount was invested in organizations needing to relocate and/or retool their facilities as they were attempting to meet overwhelming demand but limited by outdated structures and equipment. Also, with increasing emphasis upon homelessness

prevention and helping households achieve longer term financial stability, the Trust nearly doubled its support for housing assistance, home repairs, and related efforts. We also invested in efforts to reduce food waste by making awards that encouraged greater collaborations between anti-hunger agencies, community-supported agriculture and local farms, health centers, and schools.

## **Scholarships**

Perhaps our best opportunity to positively influence the trajectory of individuals and families is to increase access to education that leads to rewarding careers and economic mobility. With the cost of college tuition increasing 25% over the past 10 years, many students

are not able to pursue degrees without taking on considerable debt. This makes efforts like the W. W. Smith Scholarship Program more important than ever before. The Trust now supports students at 42 colleges and universities in the Greater Philadelphia area. On average, over 800 students receive scholarships each year. 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 43 years, many Smith Scholars have continued on to distinguished graduate schools, becoming dynamic influences in their professions in neighborhood communities. The Trust can count among them: elementary, middle and high school teachers, professors, scientists, editors, lawyers, stockbrokers, surgeons, doctors, nurses, software developers, restaurant managers, as well as professionals in many other areas.

### **Medical Research**

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; it can give rise to new research tools and techniques, some of which have medical applications. The Trust is strongly committed to its core objectives, one of which is to provide funding for basic medical research. From July 1, 2017 through June 30, 2020 the Trust approved 51 medical research grants with the hopes of launching new meaningful discoveries in the battles against heart disease, cancer and AIDS. During the 2017-2020 fiscal years, the Trust also awarded two special grants to JDRE. These two grants provided support for three diabetes research projects performed at Johns Hopkins University; one diabetes research project performed at University of Pennsylvania; and one diabetes research project performed at Children’s Hospital of Philadelphia. We are 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.

### **Maritime**

The Trust awarded Maritime Education grants for experiential learning programs in Philadelphia and Camden, providing hands-on experience to hundreds of low-income middle and high school students in traditional wooden boatbuilding, riverine sciences, and

related STEAM subjects (i.e. science, technology, engineering, arts and mathematics) – complimenting their in-school academics. As a result of the experiences, students make interesting discoveries about our local waterways, how they can help support our natural environments, and how to share what they learned with peers and the community at-large. Some participants were selected to lead community education presentations at the Independence Seaport Museum, and others served as RiverGuides offering river tours for hundreds of Philadelphia and Camden residents. The Trust also supported pilot programs to offer paid internships for those who demonstrated an interest in the sciences, community service, and/or helping younger peers with their lessons. Overall, youth 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 youth living in difficult circumstances.

The Trust also supported needed maintenance of the sailing ship, *Gazela*, through the Philadelphia Ship Preservation Guild, to help keep it available as a maritime heritage artifact and related educational purposes.

### **Special Grants**

The Trust awarded two special grants. The first was awarded to Lankenau Medical Center for their Oncology Patient Support Fund to provide emergency/pressing financial assistance for underserved oncology patients who are not able to pay for basic needs of daily life, such as food, housing, transportation to medical appointments.

The second special grant went to the Institute for Women’s Health and Leadership at Drexel University College of Medicine to provide tuition support in the form of a new Woman One Scholarship over four years. The Woman One Scholarship raises tuition funds for talented underrepresented women studying medicine at Drexel University who are committed to practicing medicine in underserved communities.

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

# GRANTS APPROVED SUMMARY

AUGUST 1977 THROUGH JUNE 30, 2020

# OF GRANTS	GRANTS	GRANTS AMOUNT
235	Grants for Medical Research Heart Program	\$34,233,579
289	Grants for Medical Research Cancer Program	\$30,235,962
80	Grants for Medical Research AIDS Program	\$7,978,845
1,354	Grants for College Financial Aid Scholarship Program	\$73,660,681
358	Grants for College Financial Aid Prize Program	\$3,300,000
72	Grants for Sea Education Program	\$546,241
2,273	Grants for Food, Clothing and Shelter Program (includes regular and challenge grants)	\$57,232,885
304	Grants for Indigent Care Program	\$8,543,526
13	Grants for Juvenile Diabetes Program	\$2,465,682

## SUBTOTAL

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4,978		\$218,197,401
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# OF GRANTS	FELLOWSHIP AWARDS	GRANTS AMOUNT
14	Fellowship Awards	\$660,000

## SUBTOTAL

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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	Lankenau Medical Center Foundation	(5/10/18)	60,000
1	Temple University	(6/13/13)	2,500,000
1	Thomas Jefferson University	(4/30/98)	1,500,000
4	University of Pennsylvania Mr. Humpton Memorial *	(6/21/04) (7/29/10)	2,000,000 100,000
	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, MBBCh	(9/20/12)	150,000

\* Mr. G. Morris Dorrance, Jr. was one of the original Smith Trustees; Mr. Charles B. Humpton was the Trust's first Chief Investment Officer. Both were valued advisors for more than 30 years.

## 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
3	Woman One Scholarship Fund (Drexel University College of Medicine)	(4/16/12)	80,000
		(12/12/13)	80,000
		(5/10/18)	100,000
3	Zoological Society of Philadelphia	(6/13/00)	1,000,000
		(11/16/15)	75,000
		(10/13/16)	150,000

### SUBTOTAL

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25		\$20,149,468
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# OF GRANTS	MARITIME GRANTS	GRANTS DATE	GRANTS AMOUNT
6	Independence Seaport Museum	(3/23/92)	\$ 500,000
		(12/8/11)	100,000
		(9/19/13)	75,000
		(9/17/15)	75,000
		(11/13/17)	100,000
		(10/17/19)	120,000
7	Philadelphia Ship Preservation Guild	(6/9/88)	50,000
		(10/4/90)	200,000
		(2/20/91)	12,500
		(6/19/02)	75,000
		(10/04/11)	200,000
		(11/13/12)	100,000
		(10/17/19)	100,000
4	Philadelphia Wooden Boat Factory	(4/11/13)	25,000
		(9/18/14)	35,000
		(9/17/15)	40,000
		(4/20/17)	46,000
5	UrbanPromise Ministries, Inc.	(9/18/14)	25,000
		(9/17/15)	25,000
		(4/20/17)	33,240
		(3/8/18)	40,250
		(10/17/19)	51,945

### SUBTOTAL

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22		\$2,028,935
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### GRAND TOTAL

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5,039 Grants		\$241,035,804
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# GRANTS



MEDICAL RESEARCH



SCHOLARSHIP PROGRAM



BASIC NEEDS PROGRAM



PHILADELPHIA MARITIME PROGRAM

# MEDICAL RESEARCH: HEART DISEASE, CANCER, AND AIDS

The Smith Trust's Basic Medical Research Program supports preeminent scientific institutions, predominantly in the Philadelphia area, in innovative basic research projects that present a discernible path to translation in areas that can materially improve human health. Our grantees push the frontiers of decoding disease across a broad array of scientific disciplines.

Our medical research awards are highly competitive. The selection process begins with the nomination by the research scientist'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.

The examples shared here provide insight into promising basic medical research funded by the W. W. Smith Charitable Trust between 2017 and 2020.

## PROJECT ON J-WAVE SYNDROMES AT LANKENAU INSTITUTE FOR MEDICAL RESEARCH

*Charles Antzelevitch, PhD, at Lankenau Institute for Medical Research, is working to advance understanding of the mechanisms underlying the development of life-threatening arrhythmias and sudden death.*

The J-wave syndromes (JWSs), consisting of the Brugada (BrS) and Early Repolarization Syndromes (ERS), have presented a challenge to the cardiology community for over two decades. JWSs are inherited cardiac arrhythmia and sudden cardiac death syndromes that share ECG features, clinical outcomes, and risk factors, as well as a common arrhythmic platform related to amplification of the J wave of the ECG. The JWSs have been shown to contribute to sudden cardiac death of young adults as they reach their prime, and in a few cases have been shown to be responsible for sudden infant death syndrome (SIDS). BrS prevalence is higher in Asian countries and among Japanese Americans than among those in western countries. Approximately five in 10,000 people have BrS, and reports suggest that BrS may be responsible for up to 20 percent of sudden death in patients with hearts that are structurally normal. ERS, on the other hand, appears to be more common. An early repolarization pattern (ERP) in the ECG is observed in up to 13 percent of the general population. It is unclear how many of these are at risk for life-threatening arrhythmic event.



*Left to right:  
Research associate professors  
Jose Di Diego, MD and  
Alexander Burashnikov, PhD,  
Charles Antzelevitch, PhD, and  
Hector Barajas-Martinez, PhD,  
research associate  
professor/consultant*



The project at Lankenau Institute for Medical Research funded by the Trust is a clinically relevant research inquiry designed to create a whole-heart model of these syndromes that will advance our understanding of the ionic and cellular mechanisms underlying the development of life-threatening arrhythmias and sudden death. The study is also designed to identify novel safe and effective approaches to therapy of these life-threatening syndromes.

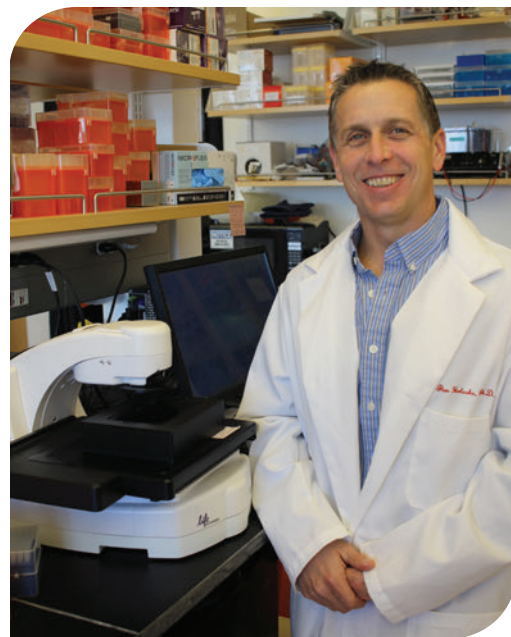
Dr. Charles Antzelevitch and his team have been successful in recapitulating many of the ECG and arrhythmic manifestations, particularly of BrS, in this whole-heart model and have demonstrated the therapeutic benefits of acacetin, a naturally occurring flavone. They are currently working on identification of more potent drugs using molecules with structural similarity to acacetin. These studies have the potential to provide the first major breakthrough in over 20 years for identification of safe and effective agent(s) for JWS. Equally important, the data generated will provide a unique platform for further development of novel therapies via the identification of efficacious lead compounds. Successful management of these syndromes, for which treatment alternatives are currently very limited, will close a very significant gap in therapeutic armamentarium for individuals at risk for sudden cardiac death.

#### **METASTASIS RESEARCH AT ROWAN UNIVERSITY**

Metastasis accounted for a large majority of the 41,760 deaths from breast cancer in 2018 and remains a significant challenge in treating cancer. A key step in metastasis requires cancer cells to squeeze through extremely small gaps in the endothelium to enter and

exit the vasculature. This requires the cell's nucleus to be compressed to ~10% of its size. During metastatic transformation, the cell nucleus changes from a rigid structure, like a tiny golf ball, to a 'squishier' structure, like a water balloon, to allow the cells to enter the bloodstream and metastasize. The Holaska Lab at Rowan University School of Medicine is interested in the mechanisms that drive these nuclear changes.

Dr. James Holaska focuses on emerin, an inner nuclear membrane protein, to study how nuclear changes drive metastasis. The objective of these studies was to



*Dr. James Holaska, at Rowan University, focuses on emerin, an inner nuclear membrane protein, to study how nuclear changes drive cell migration, invasion and metastasis.*



establish how emerin regulates nuclear structure during cancer transformation to drive cell migration, invasion and metastasis. Dr. Holaska found invasive breast cancer cells had reduced emerin expression and had smaller, misshapen nuclei. Expression of emerin in invasive breast cancer cells increased their nuclear size, blocked their migration through small pores, and inhibited metastasis in orthotopic mouse models of breast cancer. Dr. Holaska's results suggest emerin acts through stabilizing the nucleoskeleton to maintain nuclear architecture.

This important work would not have been possible without support from The W. W. Smith Foundation. This grant allowed Dr. Holaska to embark on this new



*Dr. Sachin P. Patil, at Widener University, is investigating the interaction between two specific proteins expressed on the surfaces of immune T cells and cancer cells.*

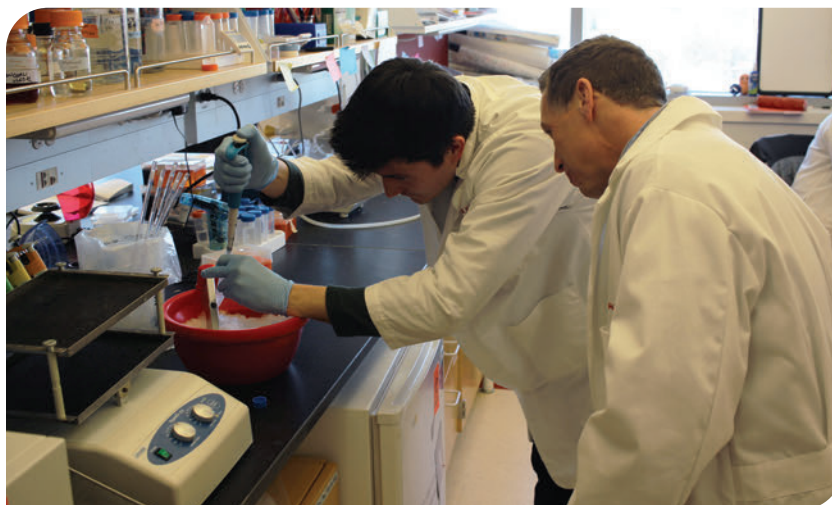
field of study for which he has made important, potentially paradigm-shifting findings. This discovery and exploration of this new paradigm will stimulate new areas of research in metastasis. Discoveries directly or indirectly relating to this work will identify new targets for therapeutic development.

## CANCER RESEARCH AT WIDENER UNIVERSITY

Current first-line cancer therapies have serious limitations and may even lead to the formation of secondary tumors. There is significant unmet need for the development of novel, effective and non-genotoxic therapeutics against cancer. One such cutting-edge approach involves activation of innate bodily systems to fight cancer cells. The activated immune system is shown to be capable of identifying and efficiently eliminating aberrant cells expressing tumor antigens. However, there are several inhibitory pathways (immune checkpoints) that regulate the function of immune T cells and help tumors evade immune destruction. Inhibitors of these immune checkpoint pathways have recently garnered significant interest as central cancer treatment modalities. All currently approved immune checkpoint inhibitors are large, protein antibodies. These antibody therapies, although effective, possess several inherent shortcomings such as lack of oral bioavailability, limited tumor tissue infiltration, and possibility of adverse immune reaction because of significantly longer retention time of these antibodies in the body. The main aim of the Patil Laboratory at Widener University is to identify non-peptidic, small-molecule immune checkpoint inhibitors that have potential to overcome all of these limitations associated with the larger protein antibody therapies.

Dr. Sachin P. Patil is investigating the interaction between two specific proteins expressed on the surfaces of immune T cells and cancer cells. The pathological interaction between these two proteins has been shown to act as an "off-switch" that prevents the immune T cells from recognizing and attacking cancer cells. He wants to know (a) if these proteins present

*Technician Nicholas Marano, BS, working with Dr. James Holaska in the lab at Rowan University.*



any “druggable” pocket at their interface, and (b) whether he can target them successfully by identifying small-molecule inhibitors, using novel, integrated molecular screening approach. His work involves potential discovery of novel drug and drug-like molecules that inhibit a pathological protein-protein interaction associated with cancer. This particular protein-protein interaction under study has a very large binding interface that has proven to be challenging so far to target using small-molecule compounds. He is utilizing for the first time a systematic scientific effort involving integrated virtual and experimental screening approaches to discover drug and drug-like compounds against this traditionally challenging, protein-protein interaction target. The screening approach, if successful against this protein-protein interaction target under study, may also prove useful in investigating other such protein-protein interactions. Thus, this work, supported by the Trust, may have broader, extrinsic scientific merit beyond the primary focus of cancer immunotherapy field.

### JUVENILE DIABETES RESEARCH

Type 1 diabetes research continues to grow at a rapid pace with dramatic new breakthroughs on the horizon.

During the past three fiscal years, the Trust has granted special funding to the Juvenile Diabetes Foundation for three diabetes research projects at Johns Hopkins University; one diabetes research project at the University of Pennsylvania; and one diabetes research project at Children’s Hospital of Philadelphia.

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The Smith Trust’s Basic Medical Research Program has made a number of sizeable grants, reflecting our belief that transformative breakthroughs require substantial investment. While we recognize that fundamental research is inherently a high-risk process, we work closely with our grantees to set meaningful targets and benchmarks, and together we ensure that the results produced can be shared and leveraged across the scientific community.

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 sustain significant investments in medical research.

### Fiscal Years 2017-2020

*Medical Research Grants: 53  
Low and High Dollar Amounts:  
\$56,588 to \$187,613*

## HEART DISEASE, CANCER, AND AIDS RESEARCH

ORGANIZATION	PROJECT	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
	<b>Heart Disease Research</b>			
Children's Hospital of Philadelphia Foundation	Visual Perception and Autism in Congenital Heart Disease	\$ 110,000	\$ —	\$ —
Children's Hospital of Philadelphia	Evaluating Human MESP1 Variants in Pluripotent Stem Cells	110,000	—	
Children's Hospital of Philadelphia	Deriving Pulmonary Vascular Fate From Cardiac Mesoderm	—	100,118	—
Drexel University	Mechanism of Cholesterol Efflux Mediated by Novel Polysaccharide Nanoparticles for Treating Atherosclerotic Heart Disease		110,000	—
Johns Hopkins University	Introducing Mitochondrial Stasis in the Heart	100,000	—	—
Johns Hopkins University	S-Nitrosoglutathione Reductase in the Aging Heart	—	—	100,000
Lankenau Institute for Medical Research	Novel Therapies for Life-Threatening Arrhythmia Syndromes	—	141,210	—
Lankenau Institute for Medical Research	Mechanisms Underlying the Development of Atrial Fibrillation in Cancer	—	—	147,401
Temple University	Cardiotoxic Effects of Dual PPAR $\alpha$ / $\gamma$ Activation	120,000	—	—
Temple University	Metabolic Reprogramming of the Heart: Novel Therapeutic Strategy for Diabetic Cardiomyopathy	—	100,000	—
Temple University	Tracing the Origins of Sex Differences in Cardiac Development and Disease	—	—	100,000
Thomas Jefferson University	Novel Akt Activators as Treatments for Acute Myocardial Ischemia and Reperfusion Injury	125,000	—	—
Thomas Jefferson University	CTRP9: Ncadherin Enhance Stem Cell Survival and Protect Heart Against Ischemic Heart Failure	—	100,000	—
University of Pennsylvania	Decoding Maturation of Human Cardiomyocytes at Single-Cell Resolution	110,000	—	—
University of Pennsylvania	Molecular Imaging to Assess Renal Denervation Efficacy After Radiofrequency Ablation: A Pilot Translational Study in Pigs	—	—	187,631
University of the Sciences in Philadelphia	Cell Cycle Regulation by an Agent of Infective Endocarditis	—	103,543	—
The Wistar Institute	DNA-Encoded Anti-Atherogenic Therapeutics for Treatment of Dyslipidemia	—	—	110,000
<b>TOTAL HEART DISEASE RESEARCH</b>		<b>\$675,000</b>	<b>\$654,871</b>	<b>\$645,032</b>

## HEART DISEASE, CANCER, AND AIDS RESEARCH

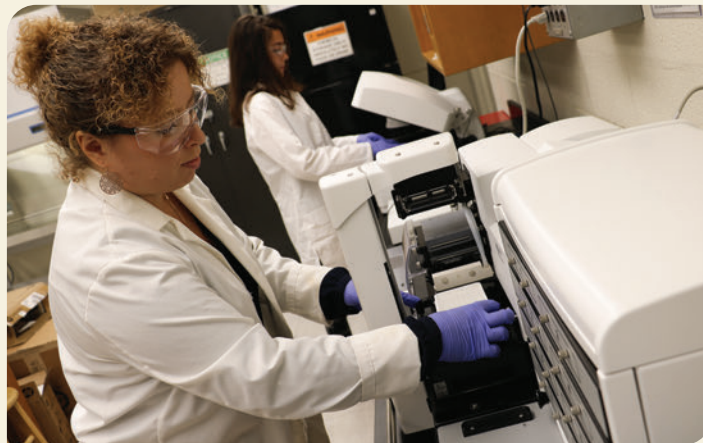
ORGANIZATION	PROJECT	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
	<b>Cancer Research</b>			
The Children's Hospital Foundation	Targeting the Marrow Niche to Improve Stem Cell Transplantation	\$ 110,000	\$ —	\$ —
Children's Hospital of Philadelphia	Deciphering the Chromatin Landscape in Acute Myeloid Leukemia	110,000	—	
Children's Hospital of Philadelphia	Combination Therapies for RAS Driven High Grade Gliomas	—	110,000	—
Children's Hospital of Philadelphia	Illuminating Malignant Metabolism in Lymphopoiesis	—	—	110,000
Coriell Institute for Medical Research	Epigenetically Silenced Tumor Suppressor Genes in Breast Cancer	—	—	110,860
Drexel University	Mechanisms of Alcohol/Acetaldehyde-Induced Esophageal Cancer	110,000	—	—
Drexel University	Organotypic Brain Slice Co-Culture for Modeling Melanoma Brain Metastasis	—	—	110,000
Fox Chase Cancer Center	Analysis and Therapeutic Targeting of Non-Proteolytic Protein Ubiquitination Pathway in Anaplastic Large Cell Lymphoma	125,000	—	—
Fox Chase Cancer Center	Targeting a K-Ras-HuR Protumorigenic Signaling Loop in Malignant Pancreatic Cancer	—	56,588	—
Fox Chase Cancer Center	The Role of Sox9 in Balancing Cell Identity and Proliferation in Bile Duct Cancer	—	—	124,996
Johns Hopkins University	ADP-Ribosylation Signaling in Cancers: Tamoxifen Resistance	100,000	—	—
Johns Hopkins University	The Structure of the Executable Ras Signaling Network	—	—	99,465
The Pennsylvania State University, Milton S. Hershey Medical Center	Metabolic and Epigenetic Cross-Talk in Ovarian Cancer Chemoresistance	110,000	—	—
The Pennsylvania State University, Milton S. Hershey Medical Center	Repurposing Beta Blockers to Improve Immunotherapy for Melanoma	—	110,000	—
The Pennsylvania State University, Milton S. Hershey Medical Center	Cancer Cell Intrinsic Immune Checkpointy Circuits	—	—	110,002
Rowan University Foundation	Emerin Regulation of Nuclear Architecture During Cell Invasion and Metastasis	—	105,238	—
Rowan University Foundation	Emerin Regulation of Nuclear Architecture During Cell Invasion and Metastasis	—	—	103,402
Temple University	Development of DNA Polymerase Theta Inhibitors as Targeted Anti-Cancer	—	100,000	—
Thomas Jefferson University	Targeting Stress Adaptation for Pancreatic Cancer Treatment	115,000	—	—
Thomas Jefferson University	Dissecting Targetable DNA Integrity Checkpoints in Prostate Cancer in Cardiac Development and Disease	—	135,000	—

## HEART DISEASE, CANCER, AND AIDS RESEARCH

ORGANIZATION	PROJECT	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
	<b>Cancer Research Continued</b>			
University of Pennsylvania	Engineering Optogenetic Ras-Erk Inhibitors to Overcome Drug Resistance in Cancer	\$ —	\$ 100,000	\$ —
University of the Sciences in Philadelphia	Development of Potent Inhibitors of an Oncogenic RNA	—	108,940	—
Widener University	Identifying Small-Molecule Immune Checkpoint Inhibitors for Cancer	—	60,260	—
The Wistar Institute	Role of ARID1A and SWI/SNF in Ovarian Carcinogenesis	110,000	—	—
The Wistar Institute	Targeting Metabolic Vulnerabilities in Tumors	—	110,000	—
The Wistar Institute	Examining Epigenetic Mechanisms of ATRX in Brain Cancers	—	—	110,000
<b>TOTAL CANCER RESEARCH</b>		<b>\$890,000</b>	<b>\$996,026</b>	<b>\$878,725</b>
	<b>AIDS Research</b>			
Fox Chase Cancer Center	Screening for Inhibitors of HIV Integrase Using a New Multimer Target	\$ —	\$ 99,715	\$ —
The Pennsylvania State University, Milton S. Hershey Medical Center	Preventing the Unwanted Guests That Plague AIDS Patients	110,000	—	—
Temple University	Triple Safety Combinatorial CRISPR Based Approach to Block HIV Replication and Viral Spread	—	—	100,000
University of Pennsylvania	Impact of HIV Infection and ART Treatment on the Functional Integrity of Lymphoid Tissue T Follicular Helper Cells	—	122,775	—
University of the Sciences in Philadelphia	Examination of HIV-1 Latency Reversal by Alprazolam Using High Resolution	99,217	—	—
The Wistar Institute	Cell-Free Glycomic Interactions in HIV Persistence and Pathogenesis	110,000	—	—
The Wistar Institute	Rational Refocusing of B Cell Responses on HIV Trimer Vaccines	—	110,000	—
The Wistar Institute	Impact of Host Glycosylation on Immune Reconstitution After Antiretroviral Therapy	—	—	110,000
<b>TOTAL AIDS RESEARCH</b>		<b>\$319,217</b>	<b>\$332,490</b>	<b>\$210,000</b>
<b>FISCAL YEAR MEDICAL RESEARCH TOTALS</b>		<b>\$1,884,217</b>	<b>\$1,983,387</b>	<b>\$1,733,757</b>

**SPECIAL GRANTS**

ORGANIZATION	PROJECT	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
Juvenile Diabetes Research Foundation	Two diabetes research projects at Johns Hopkins University; one diabetes research project at University of Pennsylvania; and one diabetes research project at Children’s Hospital of Philadelphia	\$ —	\$218,250	\$ —
Juvenile Diabetes Research Foundation	One diabetes research project at Johns Hopkins University, Accelerating Research Progress to Cure, Prevent and Treat Type 1 Diabetes	—	—	100,000
Lankenau Medical Center Foundation	Oncology Patient Support Fund: To provide emergency/pressing financial assistance for oncology patients who aren't able to pay for basic needs of daily life.	60,000	—	—
Woman One Scholarship Fund	Special grant to provide Drexel Medical School tuition support in the form of a new Woman One Scholarship over four years.	100,000	—	—
<b>TOTAL SPECIAL GRANTS</b>		<b>\$160,000</b>	<b>\$218,250</b>	<b>\$100,000</b>



*Chemical engineering student researchers Elena Fattakhova and Juliette DiFlumeri work in Dr. Patil’s lab at Widener University.*

# 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.

Since its inception, the W. W. Smith Scholarship Program has invested more than \$73 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. 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.

Initiated by the Trust beginning with the 2016-2017 academic year, the pilot program for two-year community colleges, technical colleges, and trade schools has been very successful and is now a permanent part of the Trust's Scholarships Program. Since May 2016, The Trust has awarded more than \$1 million in scholarships for students who attended these schools.

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.

Planning for college 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.

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, performing artists, software developers, as well as professionals in many other areas. This year, we are highlighting two graduates who are progressing well in their careers: Zoranyi Esteves, Rowan University, and April Falcone, Moore College of Art & Design.

## Zoranyi Esteves

*Human Resources Coordinator, Humereso*

**Rowan University, Bachelor of Sciences, Human Resource Management and Business Management '19**  
**W. W. Smith Scholar 2017-2018, 2018-2019**

Zoranyi Esteves maximized academic and professional growth opportunities while attending Rowan University. In addition to making the Dean's List, she served as Vice President of The Society of Human Resources Management (SHRM) and was a member of the Chi Epsilon Honor Society and the Society for the Advancement of Management. Zoranyi graduated in 2019 and began her career at Humereso – a human resource consulting firm based in Cherry Hill, NJ.



*Smith Scholar Zoranyi Esteves*

After completing her first year as a full-time human resource professional, she is now eligible to complete her SHRM Certified Professional credential – which will position her for further career advancement. Zoranyi shared, “The W. W. Smith scholarship I received helped me with college expenses such as school supplies, food for my long days at school, and to get a head start on my future. Not only did it help me for school, the biggest impact it had was on my ability to focus on classes and not worry about funding to pay for college or any of the supplies needed to successfully complete my degree.”

## April Falcone

*Director of Creative Services, Renaissance*

**Moore College of Art & Design, Bachelor of Fine Arts, Graphic Design '14**  
**W. W. Smith Scholar 2012-2013, 2013-2014**

April Falcone has worked at Renaissance, a Philadelphia-based full-service digital marketing firm, since 2013 when she completed her junior summer internship with the company. The firm later hired April after she graduated from Moore College in 2014. Renaissance has grown and expanded over the years, and April has had many opportunities to develop varied skills. For three years, she was the Director of Renaissance's Design Department being responsible for hiring and supervising designers and working with clients. She recently moved to their new platform development department as Director of Creative Services, using her design background and serving as a connector between clients and her colleagues in programming and web development.



*Smith Scholar April Falcone*

April was a commuter student while attending Moore, living at home in Levittown all four years and traveling to campus by train. She shared, “The W. W. Smith scholarship support helped get materials for school, and after graduation, it helped to lift the financial burden off, allowing me to focus more on my career.”

## Fiscal Years 2017-2020

*Four-Year University/College Grants: 102*  
*Low and High Dollar Amounts:*  
*\$40,000 to \$229,000*

*Two-Year College/Technical College Grants: 24*  
*Low and High Dollar Amounts:*  
*\$25,000 to \$60,000*



# SCHOLARSHIP FINANCIAL AID PROGRAM

ORGANIZATION	GRANT AMOUNT		
	Fiscal Year 2017/2018 (2018/2019 Academic Year)	Fiscal Year 2018/2019 (2019/2020 Academic Year)	Fiscal Year 2019/2020 (2020/2021 Academic Year)
<b>Four-Year Colleges</b>			
Arcadia University	\$79,000	\$85,000	\$72,000
Bryn Mawr College	69,000	78,000	67,000
Cabrini University	66,000	75,000	65,000
Cairn University	59,000	67,000	55,000
Chestnut Hill College	67,000	74,000	63,000
Cheyney University	52,000	49,000	50,000
Delaware Valley University	73,000	81,000	66,000
Drexel University	146,000	168,000	146,000
Eastern University	64,000	72,000	62,000
Gwynedd-Mercy University	70,000	79,000	67,000
Haverford College	40,000	40,000	60,000
Holy Family University	64,000	75,000	62,000
Immaculata University	61,000	67,000	58,000
LaSalle University	77,000	86,000	77,000
Lincoln University	56,000	62,000	50,000
Moore College of Art & Design	68,000	75,000	63,000
Neumann University	67,000	74,000	62,000
Peirce College	43,000	46,000	41,000
Penn State Abington	51,500	66,000	52,000
Penn State Brandywine	51,500	54,000	42,000
Pennsylvania Academy of the Fine Arts	65,000	69,000	62,000
Philadelphia University	75,000	—	—
Rosemont College	56,000	63,000	51,000
Rowan University	123,000	141,000	116,000
Rutgers University	70,000	81,000	71,000
St. Joseph's University	93,000	102,000	90,000
Temple University	204,000	229,000	198,000
Thomas Jefferson University	—	84,000	72,000
University of Pennsylvania	40,000	40,000	100,000
University of the Arts	78,000	84,000	73,000
University of the Sciences in Philadelphia	64,000	71,000	66,000
Ursinus College	78,000	86,000	77,000
Villanova University	97,000	108,000	95,000
West Chester University	116,000	126,000	112,000
Widener University	83,000	92,000	79,000
<b>Four-Year College Totals</b>	<b>\$2,566,000</b>	<b>\$2,849,000</b>	<b>\$2,542,000</b>
<b>Two-Year and Technical Colleges</b>			
Bucks County Community College	25,000	30,000	30,000
Camden County College	25,000	30,000	30,000
Community College of Philadelphia	25,000	30,000	30,000
Delaware County Community College	25,000	30,000	30,000
Harcum College	30,000	40,000	30,000
Manor College	30,000	30,000	30,000
Montgomery County Community College	25,000	30,000	30,000
Williamson College of the Trades	30,000	60,000	60,000
<b>Two-Year/Technical College Totals</b>	<b>\$215,000</b>	<b>\$280,000</b>	<b>\$270,000</b>
<b>FISCAL YEAR TOTALS</b>	<b>\$2,781,000</b>	<b>\$3,129,000</b>	<b>\$2,812,000</b>

# BASIC NEEDS PROGRAM

## IMPROVING ACCESS TO FOOD, CLOTHING AND SHELTER

For more than four decades, the W. W. Smith Charitable Trust has supported hundreds of nonprofits in the Greater Philadelphia region that share the foundation's commitment to improving access to food, clothing and shelter for those who are in need. While ongoing reports of local poverty can be discouraging, the Trust remains optimistic. We are fortunate to have opportunity to regularly visit with partnering leaders, staff and volunteers who are engaged in thoughtful and creative approaches to making a difference in high-need communities.



*The POINT develops positive relationships with students while providing for their basic needs, such as a nutritious dinner.*

### THE PARKESBURG POINT YOUTH CENTER

Providing environments where children and youth from difficult circumstances can thrive has a profound impact upon their achievements during their school years and increases their belief in their abilities to create an ideal future for their families. The staff and volunteers at The Parkesburg Point Youth Center (The Parkesburg POINT) in Chester County, Pennsylvania are fueled by this conviction and have witnessed, firsthand, what is possible when you develop positive relationships with students, facilitate activities that nurture their interests, support their academics, and respond to their basic needs.

The Parkesburg POINT holistically meets the physical, emotional, academic and spiritual needs of over 400 at-risk youth annually through a variety of programs ranging from after-school homework assistance and career exploration to performing arts and fitness programs. The students experience hunger daily and come from predominantly single-parent households, 90% of which fall below



*This past year The POINT helped feed more than 400 food-insecure youth in their community.*

the poverty level. Many of the youth have experienced homelessness, transient housing conditions, mental or physical abuse, academic hardship, or have parents struggling with addiction or mental health challenges. The Parkesburg POINT has become a second home for these students, and it is crucial that the youth center be able to provide them with a nutritious dinner and other emergency supports, while their families continue to build momentum towards a brighter tomorrow.

The Trust has supported The Parkesburg POINT with this mission since 2013 — starting with commercial kitchen equipment and food purchases needed for a robust, restaurant-style, after-school nutritious meal program. With the participation of 20 churches from communities near the youth center, The Parkesburg POINT provides after school snacks and dinner at least four nights a week for a daily average of 60-80 food insecure students each night. More than 400 children and youth, ages 8 to 18, benefit from this program each year. Providing these meals not only addresses students' immediate hunger, it increases their capacity

to focus and thrive academically, socially and emotionally.

In addition to the nutrition program, W. W. Smith funding helped The Parkesburg POINT further formalize its Emergency Fund — financial aid for students' families struggling with housing, utilities, groceries or clothing needs.

The Trust is greatly encouraged by how The Parkesburg POINT is making a difference in the lives of youth and their families. We are also proud of all the students attending the after-school programs and the number of testimonials concerning their successes in school and beyond.

## REBUILDING TOGETHER PHILADELPHIA

Helping homeowners maintain safe and healthy houses is crucial for short-term stability and longer-term economic mobility. Retaining a home and keeping related expenses under 30% of household income have long been considered key contributors for families working to move up the economic ladder. In Philadelphia, a relatively high percentage of low-income residents are homeowners. Unfortunately, due to aging properties and exceptionally low discretionary income, many families live in physically deficient housing that they cannot afford to repair. Issues such as poor insulation, exterior damage, leaky roofs, and unabated lead, often go unaddressed and can lead to energy loss, pest infestation, asthma, allergies, injuries, intruders, and other matters that further exasperate difficult living conditions.

Rebuilding Together Philadelphia (RTP) endeavors to help families in these circumstances by transforming vulnerable houses into safe, healthy and energy-efficient homes. All houses considered for repair are

“ A mother recently came to us in a critical time of need. She had been serving tables at a local restaurant and an opportunity for a management position became available. Her employer sent her to Management Training but when she returned, she learned that the previous manager changed his mind, and the position was no longer available. Unfortunately, the schedule for servers had been filled during the time she was away, requiring her to wait four to six weeks before

she could get on the schedule. Thanks to help from The W. W. Smith grant we were able to help keep this family's lights and heat on until the mother could get back on the schedule at work. We also provided gift cards to help keep the family fed. The mother shared, 'When I brought all the groceries home and put them in the cupboards the kids said, oh my gosh, the cupboards aren't bare!!'”

— Nancy Sykes, Program Director,  
The Parkesburg POINT



*Sharing a happy moment while learning about power tools.*

evaluated on 25 Safety and Healthy Housing Goals such as having a watertight roof, secure doors and windows, and grab bars if needed. On average, there are 14 health or safety hazards in houses before RTP begins work (56% of goals met). When RTP has completed repairs, there are just one or two health or safety hazards on average (94% of goals met). With support from sources such as W. W. Smith, these home repairs are provided free of charge.

As part of an innovative collaboration between healthcare and home repair, RTP has been part of a collaboration working to repair the homes of Children’s Hospital of Philadelphia (CHOP) patients with asthma. In addition to RTP’s standard health and safety assessment, these home repairs address factors that reduce asthma triggers such as replacing worn, dusty carpets, moldy drywall, and older furnace filters.

Along with providing immediate home repair assistance, RTP is helping to develop workforce skills and community service among high school students,

many of whom are from the same communities that benefit from these efforts. Through the organization’s Emerging Rebuilders Program, vocational students rebuild deteriorating homes to allow low-income senior homeowners to age in place while simultaneously gaining experience for a career in construction. Since 2017, RTP has partnered with construction students at a public vocational high school, Randolph Career and Technical High School. Five additional partners (four schools and one workforce development program) were added in 2020.

When COVID-19 led to a required pause in home repair services in 2020, RTP shifted to delivering groceries to their clients across Philadelphia. Many are located in neighborhoods where food access is very limited during “normal” times, let alone during a pandemic.

W. W. Smith is proud to support Rebuilding Together Philadelphia in its efforts to ensure that homeowners address repairs, allowing them to enjoy a safe living environment for their families and improve their potential for financial progress.



*Rebuilding Together Philadelphia construction students repair deteriorating homes to allow low-income, senior homeowners to age in place.*

“ With the investment of The W. W. Smith Charitable Trust, Rebuilding Together Philadelphia (RTP) was able to repair 101 vulnerable, owner-occupied homes this past year. Next year, RTP is raising the bar even higher: we want to make 150 homes safer and healthier for lower-income homeowners and their families — a goal only possible with the support of the Trust.”

— Stefanie Seldin, Executive Director, RTP

*Mitzvah Circle volunteers deliver personalized necessities to families struggling in dire circumstances.*



*Young volunteers work packing Mitzvah Circle specialized boxes for other young children.*

“ When a family does not have clean diapers for their baby or appropriate clothing for their children, they are not able to take them to daycare or school, and they will not visit the doctor for a well visit for fear of being reported or chastised. We believe every baby deserves a clean diaper, every child deserves quality clothing, and all girls and women should have what they need to attend school and work with dignity. W. W. Smith’s grants help Mitzvah Circle Foundation bring diapers, new clothing, and feminine personal care items to thousands of people who had nowhere else to turn to for critical, material support.”

*— Fran Held, Founder and Executive Director, Mitzvah Circle Foundation*

### MITZVAH CIRCLE FOUNDATION

Children deserve the best possible start in life. The love and caring experienced from infancy to early childhood affects a child’s cognitive, social and emotional development. Clean diapers and properly fitting children’s clothing are essential aspects of this care. Working poor families living paycheck to paycheck, as well as those experiencing deep poverty, do not have consistent resources to afford these items. Thanks to the critical needs and diaper bank programs operated by Mitzvah Circle Foundation (MCF), thousands of Greater Philadelphia families living in areas of deep poverty can now access these necessities. This provision of life’s essential items enables recipients to endure crisis, illness and poverty with dignity and hope.

In 1999, Fran Held, founder of MCF, witnessed a middle-class family receive a devastating cancer diagnosis and rapidly deplete its financial resources. With no extended family to lend a hand, they didn’t know where to turn. Ms. Held realized a void existed for those in crisis seeking immediate relief. Families could not obtain basic necessities — shoes, diapers, or baby clothes — without navigating complex bureaucracies.

MCF now collaborates with 216 organizations in the Greater Philadelphia region to ensure that low-income families with children have the clothing, diapers, and other basic items they need. In addition to participants contacting MCF directly, the organization receives referrals from social workers, organizations, and hospitals that refer individuals and families including: Children’s Hospital of Philadelphia, Maternity Care Coalition, Easter Seals, The Red Cross, Catholic Social Services, Manna on Main Street, and hundreds more.

In 2019, Mitzvah Circle distributed 1,440,143 diapers to babies living in poverty, delivered 21,481 boxes of personalized necessities to families struggling in dire circumstances, and provided 338,497 feminine hygiene essentials to girls and women so they could attend work and school.

With little lead time, MCF was forced to relocate its offices and warehouse in early 2020. The moving process started just before the COVID-19 shutdown was put into effect. The organization safely and successfully completed its move, increased its capacity to store items for distribution, and continued to be on the frontline – making sure families had the essentials needed for daily living during the pandemic.

Together, W. W. Smith and Mitzvah Circle are ensuring parents can go to work with dignity and children can attend school or daycare with hope for a bright future.

### ROLLING HARVEST FOOD RESCUE

According to Feeding America and NRDC, 40% of all food produced in the United States is wasted. That is an average of 400 pounds per person each year. Based in Bucks County, Pennsylvania, Rolling Harvest Food Rescue operates at the intersection of food waste, hunger-relief, and environmental stewardship by capturing and distributing the available surplus from local growers that was previously going to waste.

Rolling Harvest partners with local farmers in the Greater Philadelphia area, making it easy for them to share their fresh, healthy produce with the food-insecure communities in which they live. Dedicated volunteers help with daily pick-up and delivery schedules from 38 farms and food producers, assist with weekly distributions to more than 60 hunger relief sites, and gather food directly from their farm partners' fields. Rolling Harvest also conducts weekly Nutrition Education Outreach with Free Farm Markets



*Volunteer Caitlyn loads up organic, pastured eggs from Profeta Farms for Fresh Connect recipients.*

at some of the sites to educate the recipients about nutrition, cooking and using the donated produce to their best benefit with no waste.

The organization recently passed the major milestone of 2,000,000 pounds rescued, which translates to more than 10 million servings of fresh and organic produce and proteins on the plates of thousands of our neighbors in need since its start in 2012.

What makes Rolling Harvest unique is the organization's decidedly collaborative approach to creating win-win opportunities for families and farmers in need. These efforts led to the organization's recent recognition by Pennsylvania Association of Sustainable

“ The generous W. W. Smith Charitable Trust basic needs funding has enabled us to subsidize local farmers to keep more farm-based healthy food in the food donation supply chain to benefit those struggling with food-insecurity and lack of access to healthier dietary choices. This is appealing, fresh, nutrient-dense food that was previously

unavailable, and often headed to compost or landfill instead of feeding the hundreds of local families and seniors who are now being served through our collaborative Fresh Connect mobile farm market model throughout Bucks County, PA.”

— *Cathy Snyder, Founder and Executive Director, Rolling Harvest Food Rescue*



*Rolling Harvest Food Rescue volunteer gleaners harvest organic cabbage from Tinicum CSA for immediate distribution to families in need.*

Agriculture through its 2020 PASAbilities Sustainable Agriculture Community Leadership Award. Among the top criteria for the award is demonstrated passion and efforts to improve local food systems, farms, and communities.

Perhaps the most telling example of the level of trust Rolling Harvest has earned in the community is the three acres of organic farmland donated to the organization by a local farm partner. The organization will use the opportunity to create its own donation farm, including hiring a farmer specifically to grow in-demand, culturally appropriate food for distribution through food pantries, farmer markets, schools, and other places that families in need turn to for help.

Rolling Harvest's expansion to include farm-based operations came at a time when COVID-19 hit. The pandemic almost tripled the number of persons turning to them for help. Fortunately, the organization was positioned to offer solutions when the local region was experiencing the effects of significant food supply chain disruptions. Rolling Harvest leveraged funding

to help local growers, keep thousands of pounds of great food from landfills, modify its distributions for safe social distancing, and convert to a drive-thru food distribution approach.

W. W. Smith is happy to be one of Rolling Harvest's funding partners in support of efforts that not only make sure families have food to eat, but also help our environment through waste reduction and support our economy through local farmer partnerships.

The Trust is greatly encouraged by the efforts of The Parkesburg Point Youth Center, Rebuilding Together Philadelphia, Mitzvah Circle Foundation, Rolling Harvest Food Rescue, 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 2017-2020**

*Food, Clothing and Shelter Grants: 281*

*Low and High Dollar Amounts: \$5,000 to \$100,000*

# FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
Action Wellness	Food/Clothing/Shelter	\$ 20,000	\$ —	\$ 25,000
Advocates for Homeless and Those in Need	Shelter	12,000	—	15,000
Bebashi Transition to Hope	Food	8,500	—	40,000
Bethany Christian Services of Greater Delaware Valley	Food/Clothing/Shelter	—	15,000	—
Bethesda Project	Food/Shelter	—	40,000	25,000
Boyertown Area Multi-Service, Inc.	Food	—	—	10,000
The Breathing Room Foundation	Food/Clothing/Shelter	10,000	15,000	—
Bringing Hope Home, Inc.	Food/Shelter	—	25,000	35,000
Broad Street Ministry	Food/Clothing	—	50,000	65,000
Bucks County Housing Group, Inc.	Shelter	25,000	—	—
Bucks County Opportunity Council, Inc.	Shelter	25,000	40,000	30,000
Camphill Village Kimberton Hills, Inc.	Food/Clothing/Shelter	30,000	35,000	—
CARIE/Center for Advocacy for the Rights and Interests of the Elderly	Shelter	—	10,000	12,500
Caring for Friends	Food	—	—	67,500
Cathedral Kitchen	Food	45,000	—	45,000
Catholic Housing and Community Services	Food	—	40,000	25,000
Center for Family Services, Inc.	Food/Shelter	20,000	—	—
Center for Positive Aging in Lower Merion	Food	—	14,000	10,000
Center in the Park	Food	—	15,000	15,000
Chester County Food Bank	Food	—	50,000	45,000
Chester County Women's Services	Food/Clothing/Shelter	14,000	—	20,000
Chestnut Hill Meals on Wheels	Food	6,500	—	8,000
Christ's Home	Food/Shelter	38,000	45,450	—
The Church Farm School	Food/Clothing/Shelter	63,000	19,808	—
Covenant House of Pennsylvania	Food	20,000	17,105	—
Coatesville Area Senior Center	Food	15,000	—	—
Cradle of Hope, Inc.	Food/Clothing	10,000	20,000	—
Cradles to Crayons	Clothing	—	75,000	—
Daily Bread Community Food Pantry	Food	10,000	15,000	—
Depaul USA	Shelter	—	—	20,000



## FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
The Devereux Foundation/Devereux Advanced Behavioral Health	Clothing	\$ —	\$ 35,000	\$ 30,000
Dignity Housing	Shelter	28,000	—	—
The Domestic Abuse Project of Delaware County	Food/Clothing/Shelter	100,000	75,000	—
Downingtown Area Senior Center, Inc.	Food	8,000	—	—
Drueding Center	Food/Clothing	26,000	—	22,000
ElderNet of Lower Merion and Narberth	Food	—	10,000	15,000
Energy Coordinating Agency of Philadelphia, Inc.	Shelter	25,000	—	25,000
Episcopal Community Services	Food	—	50,000	50,000
Esperanza Health Center	Food	—	15,000	—
Face to Face	Food/Clothing/Shelter	—	25,000	27,000
Families Forward Philadelphia	Shelter	40,000	—	—
Family Promise of Southern Chester County	Food/Clothing/Shelter	13,500	—	—
Family Service Association of Bucks County	Food	—	54,135	—
Family Service of Chester County	Food/Clothing/Shelter	—	—	10,000
Family Services of Montgomery County	Food	22,000	—	25,000
Family Support Services, Inc.	Food	—	16,000	—
Feast of Justice	Food	—	25,325	—
Federation Housing, Inc.	Food	—	—	20,000
Food Bank of South Jersey	Food	80,000	—	—
The Food Trust	Food	25,000	25,000	—
Friends Association for Care and Protection of Children	Shelter	—	17,500	20,000
Friends Home in Kennett	Food	—	39,500	—
Generations of Indian Valley	Food	—	41,317	—
George W. South Memorial Church of the Advocate	Food	—	16,287	20,000
Germantown Avenue Crisis Ministry	Food/Clothing/Shelter	—	50,000	40,000
Golden Slipper Center for Seniors	Food	20,000	—	—
Good Neighbors Home Repair	Shelter	32,000	—	—
Good Samaritan Services	Shelter	—	30,000	30,000
Good Works, Inc.	Shelter	—	30,000	30,000

# FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
Greater Harleysville and North Penn Senior Services	Food	\$ 20,000	\$ —	\$ 15,000
Greener Partners	Food	—	40,000	40,000
Greensgrow Philadelphia Project, Inc.	Food	—	24,663	—
Habitat for Humanity of Bucks County, Inc	Shelter	20,000	—	25,000
Habitat for Humanity Philadelphia	Shelter	30,000	45,000	30,000
Holy Family Home – Little Sisters of the Poor	Food/Shelter	40,000	50,000	50,000
Housing Partnership of Chester County, Inc.	Shelter	—	20,000	20,000
HumanGood Pennsylvania	Food/Shelter	45,000	60,000	—
Interfaith Hospitality Network of the Main Line	Shelter	—	—	15,000
Inter-Faith Housing Alliance	Food/Shelter	—	40,000	—
JEVS	Shelter	—	—	13,680
Jewish Family and Children’s Services	Food/Shelter	40,000	40,000	—
Jewish Relief Agency	Food	25,000	25,000	25,000
Joseph's House of Camden, LLC	Shelter	—	11,086	34,349
Kelly Anne Dolan Memorial Fund	Shelter	40,000	50,000	—
Kennett Area Senior Center	Food	—	10,000	—
Keystone Opportunity Center	Shelter	—	10,000	15,000
Laurel House	Shelter	—	26,481	87,000
Lighthouse Youth Center	Food	—	12,000	22,000
Lily’s Hope Foundation	Food/Clothing/Shelter	8,000	—	—
Living Beyond Breast Cancer	Food/Clothing/Shelter	—	30,000	30,000
The Lord’s Pantry of Downingtown	Food	30,000	—	—
Lucy Outreach	Food	—	25,000	25,000
Lutheran Children and Family Service	Food/Shelter	45,000	—	45,000
Lutheran Settlement House	Food/Shelter	40,000	—	35,000
Main Line Meals on Wheels, Inc.	Food	—	15,000	10,000
MANNA	Food	55,000	—	—
Manna on Main Street	Food	—	15,000	34,316
Maternity Care Coalition	Food/Clothing/Shelter	40,000	50,000	—

## FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
Mattie N. Dixon Community Cupboard, Inc.	Food/Clothing	\$ 9,000	\$ —	\$ 10,000
Mazzoni Center	Food	20,000	20,000	—
Meals on Wheels of Central Bucks County	Food	5,000	—	10,000
Meals on Wheels of Chester County, Inc.	Food	15,000	—	15,000
Miriam and Robert M. Rieder House, Inc.	Shelter	20,000	—	—
Missionary Servants of the Most Blessed Trinity	Shelter	—	—	15,100
Mitzvah Circle Foundation	Food/Clothing	—	40,000	75,000
Montgomery County Foundation Inc.	Food/Clothing/Shelter	—	19,200	30,000
Mothers' Home	Food/Clothing/Shelter	—	—	24,700
National Giving Alliance	Clothing	—	15,000	25,000
Nationalities Service Center	Food/Clothing/Shelter	—	25,000	25,000
Neighborhood Center, Inc.	Food	36,000	—	40,000
Neighbor to Neighbor	Food	—	—	10,427
Net Community Care	Food/Clothing/Shelter	13,000	15,000	—
Norristown Ministries, Inc. Hospitality Center	Food/Shelter	10,500	—	—
North Light Community Center	Food/Shelter	—	30,000	30,000
Northwest Philadelphia Interfaith Hospitality Network	Food/Clothing/Shelter	—	55,000	—
One House at a Time	Shelter	30,000	35,000	—
The Open Link	Food/Shelter	25,000	25,000	—
Operation Warm	Clothing	30,000	30,000	—
Orion Communities, Inc.	Food/Clothing/Shelter	20,000	—	40,000
Oxford Area Neighborhood Services Center	Food/Shelter	—	—	20,000
Oxford Area Senior Center	Food	—	5,120	—
Parkesburg Point Youth Center	Food	30,000	30,000	30,000
Pathways to Housing PA	Shelter	—	10,000	20,000
Patrician Society of Central Norristown	Shelter	8,000	8,000	—
Penn Asian Senior Services	Food	—	45,000	—
Pennsylvania Home of the Sparrow	Shelter	15,000	—	—

## FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
People's Emergency Center	Food	\$ 40,000	\$ —	\$ —
Philabundance	Food	45,000	—	35,000
Philadelphia Corporation for Aging	Shelter	—	20,000	20,000
The Philadelphia Project	Shelter	15,000	15,000	—
Philadelphia Ronald McDonald House	Shelter	—	—	20,000
Phoenixville Women's Outreach	Shelter	—	—	30,000
The Pottstown Cluster of Religious Communities	Food	—	—	17,000
Project H.O.M.E.	Food	20,000	22,500	—
Project Outreach	Shelter	—	5,000	—
Raymond and Miriam Klein JCC (DBA Kleinlife)	Food/Shelter	50,000	—	35,000
Rebuilding Together Philadelphia	Shelter	50,000	—	60,000
Resources for Human Development	Food/Clothing/Shelter	—	—	21,698
Rolling Harvest Food Rescue	Food	—	21,565	20,000
Safe Harbor of Chester County, Inc.	Food/Shelter	20,000	—	—
Saint John's Hospice	Food/Clothing/Shelter	65,000	—	65,000
Saint Joseph's Carpenter Society	Shelter	40,000	—	40,000
Saint Vincent de Paul Society/ Sacred Heart Conference	Food/Clothing/Shelter	—	8,000	7,000
The Salvation Army	Food/Shelter	38,036	40,000	30,000
Saunders House	Food	—	—	19,718
Senior Adult Activity Center of the Phoenixville Area	Food	11,000	22,720	—
Senior Community Services	Food	35,000	—	35,000
SHARE Food Program, Inc.	Food	80,656	100,000	100,000
Silver Springs - Martin Luther School	Food/Shelter	39,605	44,468	—
Simpson House	Food	—	43,000	—
Sisters of Saint Joseph/ St. Joseph Villa	Shelter	40,000	—	—
The Sisters of St. Francis of Philadelphia	Shelter	—	50,000	—
St. Christopher's Foundation for Children	Food	60,000	—	30,000
St. Ignatius Nursing Home	Shelter	—	—	51,326

# FOOD, CLOTHING AND SHELTER FOR CHILDREN AND OLDER ADULTS

ORGANIZATION	Food, Clothing & Shelter Grant Area	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
St. Mary's Franciscan Shelter for Families	Shelter	\$ 8,000	\$ —	\$ —
St. Peter's Church Food Cupboard	Food	20,000	—	—
Touch New Jersey, Inc.	Food	20,000	25,866	28,050
Tredyffrin & Easttown Care	Food/Clothing/Shelter	15,000	15,000	—
TriCounty Active Adult Center	Food	15,000	15,000	—
Tricounty Community Network Inc	Food	—	—	76,470
Urban Resources Development Corporation	Shelter	—	12,000	—
Utility Emergency Services Fund	Shelter	50,000	—	30,000
Valley Youth House Committee	Food	—	15,000	15,000
theVillage	Shelter	—	54,000	—
Virtua Health Foundation	Food/Clothing	—	—	40,000
Visitation Homes	Food/Shelter	30,000	—	—
West Chester Area Senior Center	Food	—	25,000	—
West Chester Food Cupboard	Food	40,000	50,000	—
The Whosoever Gospel Mission and Rescue Home Association of Germantown Avenue	Food/Clothing/Shelter	—	25,000	20,000
Why Not Prosper, Inc.	Clothing/Shelter	5,000	7,000	—
William Way LGBT Community Center	Food	—	10,000	—
Willow Grove Community Development Corporation	Shelter	—	—	35,000
Wings for Success	Clothing	—	—	7,500
A Woman's Place	Shelter	—	10,000	—
Women Against Abuse, Inc.	Food	50,000	—	—
Women in Dialogue	Food	—	30,475	—
YoungMoms	Food/Clothing/Shelter	5,000	5,000	—
Youth Service, Inc.	Clothing/Shelter	30,000	30,000	30,000
<b>FISCAL YEAR TOTALS</b>		<b>\$2,530,297</b>	<b>\$2,874,071</b>	<b>\$2,809,834</b>

# PHILADELPHIA MARITIME PROGRAM

Since the founding of Philadelphia, the Delaware River and its tributaries have been vital to the life, growth and prosperity of the City and surrounding region. Through its Philadelphia Maritime Program, W. W. Smith provides grant support for maritime education programs that leverage these local waterways and for the preservation of the tall sailing ship Gazela.

## URBANPROMISE URBAN BOATWORKS

Established in 2009 in Camden, New Jersey as a program of UrbanPromise, Urban BoatWorks (UBW) expects their youth to build incredible boats, and in doing so, develop the perseverance they need to succeed. UBW's mission is to be a hands-on experiential learning program where students can engage their curiosity and learn the motivation and grit to finish a long-term learning project. The program began with the idea of reconnecting Camden youth to the waterways and the rich maritime history of their city. In a city limited in resources, there are seldom positive experiential learning opportunities within families, schools, or community settings. Boat builds are designed to motivate students to ask questions and take initiative and leadership in the shop.

Each year, Urban BoatWorks engages 75 to 85 Camden youth (grades 6-12) in wooden boat building projects including canoes, kayaks, stand-up paddle boards, dragon boats, and 25'

*Working together, UrbanPromise students perfect their paddling techniques.*



*UrbanPromise students celebrate the comradery of a successful day paddling on the Cooper River.*





*UrbanPromise students start the day carrying their canoe to the river.*

voyageur canoes. Upon completion of projects, students and the community put the boats immediately to use. The boatbuilding program, housed in the Camden Shipyard and Maritime Museum, works in tandem with UrbanPromise’s on the water programming to first teach maritime history and culture through boat construction and then provide meaningful experiences on the water for both the students who participated in construction and the community at large.



*An UrbanPromise student beams with joy to be on the water, in a boat built by students, doing what she loves.*

Unique to UrbanPromise’s on the water programming is the RiverGuides youth employment program in which Camden high school students, in addition to building boats, are trained in on the water safety, paddling technique, and the history and ecology of the Cooper River that runs through Camden. Students then lead tours throughout the summer months on the Cooper River and local waterways. UrbanPromise and its RiverGuides engage 400 to 500 community members in annual water and land-based maritime activities.

The W. W. Smith Charitable Trust awarded annual grants between 2017 – 2020 to help UBW sustain programming (especially during the 2020 pandemic) and pilot paid internships for program graduates to develop employability skills while assisting instructors. During this period, UBW engaged a total of 191 middle grades and high school students from 2017 – 2020. Over the past two years, 400+ Camden neighbors participated in the program’s educational community paddles led by student RiverGuides.

As with all organizations, the COVID-19 pandemic had a substantial impact on programming and operations at UrbanPromise. They remained committed to their students and are staying connected virtually and engaged in outdoor activities. Urban Promise hired nine students for their RiverGuides program in the summer of 2020. They completed all of the training on the water and land-based for leading safety briefings and canoe rescue as they would in any other year. In the end they created a video tour of the tidal Cooper, which has already been shared with several stakeholders and environmental groups. They earned their stripes, they learned, they became proficient in their craft, they became RiverGuides.

BoatWorks programming has been limited in scope and size, but they continue to offer in-person and hybrid programming as they are able. Limited group paddles were offered in 2020 to members of the UrbanPromise community; they look forward to opening those to the community at large and will do so as soon as it’s deemed safe.

## **Fiscal Years 2017-2020**

*Philadelphia Maritime Grants: 5*

*Low and High Dollar Amounts: \$40,250 to \$120,000*

ORGANIZATION	PROJECT	GRANT AMOUNT		
		Fiscal Year 2017/2018	Fiscal Year 2018/2019	Fiscal Year 2019/2020
Independence Seaport Museum	To increase program staff for their educational programs: the SAILOR program; Boat Build program; and Field Trips program. Also, to hire a STEM educator or science educator who would be used across multiple programs.	\$ 100,000	\$ —	\$ —
Independence Seaport Museum	To support ongoing maritime education programs including: (1) SAILOR (Science and Arts Innovative Learning on the River), (2) Art & Technology Initiatives - e.g. EAGLE (Educating Acquisition, Global Logistics and Engineering), Introduction to 3D Design, Tech & Textiles, (3) River Ambassadors, (4) Field Trip Outreach, and (5) Summer Programs - e.g. Kid's Camp, Teen Camp, Paddle Penn's Landing.	—	—	120,000
Philadelphia Ship Preservation Guild	Gazela repairs to address routine maintenance and the 2015 survey recommended repairs that can be completed while the ship is in the water.	—	—	100,000
UrbanPromise Ministries, Inc	To continue engaging approximately 120 students in boatbuilding projects during the 2018-19 academic year; to implement a student apprenticeship program for three Camden youth; and to hire a professional intern to support program implementation.	40,250	—	
UrbanPromise Ministries, Inc	To engage approximately 70 students in boat building projects during the 2019-2020 academic year, engage more than 300 local residents and community stakeholders in on-the-water education, and continue the student apprenticeship program.	—	—	51,945
<b>TOTAL PHILADELPHIA MARITIME GRANTS</b>		<b>\$140,250</b>	<b>\$0</b>	<b>\$271,945</b>



# 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:

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

## APPLICATION GUIDELINES

### BASIC NEEDS PROGRAM

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:
  - 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.
  - Clothing: direct purchase of clothing for children or older adults, clothing gift cards or vouchers.
  - 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,

## BASIC NEEDS PROGRAM (CONTINUED)

equipment, appliances) deemed essential for the provision of emergency shelter, transitional housing, or other residential programs for children or seniors.

- 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

### Application Deadline

June 15 by 11:59 p.m. EST

December 15 by 11:59 p.m. EST

maximum award limit. Grants typically range from \$10,000 to \$40,000.

### How to Apply

- Applications must be submitted through the Trust's portal, which can be accessed on our Basic Needs page: <http://www.wsmithcharitabletrust.org/basicneeds.html>. Note: The Trust no longer accepts hard copy or emailed applications.
- Applicant 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 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.

### Decision and Notification

Fall Trustee Meeting (September/October)

Spring Trustee Meeting (March/April)

## 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. Grants must be used for student scholarships 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.

### How to Apply

- Invited colleges and universities must submit their applications online using the Trust's grant portal. Instructions will be emailed directly to each preselected school.
- For institutions of higher education seeking consideration as a new partner for the scholarships program, submit your inquiry to [info@wsmithcharitabletrust.org](mailto:info@wsmithcharitabletrust.org).

## 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.

**Application Deadline**  
July 15 by 11:59 p.m. EST

- 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

- Applications must be submitted online through the Trust's portal, which can be accessed on our Medical Research page: [wwsmithcharitabletrust.org/medical.html](http://wwsmithcharitabletrust.org/medical.html). Note: The Trust no longer accepts hard copy or emailed applications.
- 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 through the portal 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 must be received by the deadline 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.

**Decision and Notification**  
October/November

## 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

- Applications must be submitted through the Trust's portal. Please email [info@wwsmithcharitabletrust.org](mailto:info@wwsmithcharitabletrust.org) for further instructions before applying.
- 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.

