LWV LEAGUE OF WOMEN VOTERS® OF NEEDHAM

Education Fund

Annual Report, May 2022

The League of Women Voters of Needham Education Fund (LWVN-EF), incorporated in March 2015, continues to focus on its educational mission of establishing programs to help people participate in their government.

As Fiscal Year 2022 proceeded, pandemic restrictions continued to be challenging, although we had some opportunities to hold events in person. We were able to continue to meet our mission in creative ways, particularly with the evolution of the Civics Showcase. Our voter service efforts for the two elections this year—a Special Election for Select Board in December 2021 and the regular April local election—were strong, involving several members and providing information to many viewers and later website visitors.

We held two educational forums for the public, one on affordable housing and one on school nutrition services. Our Needham High LWV Club's members continued their work of building voter awareness among potential newly eligible voters, as well as by participating in our April Candidates Night. More details on these and additional events are listed below. We added a section to the lwv-needham.org website for "Civic Education and Youth Engagement" to include programs with youth (NHS club, civics education, NHS scholarship, and civics series--see https://lwv-needham.org/civic-education/).

All year, the use of our website and social media helped inform the public about our events and voter information. Our website was heavily viewed before and on election day for both local elections. We had 545 views of our recording of the December Special Select Board election Candidates Night forum, and 545 views of the April forum recording. In addition, the on-line voter guide was viewed 715 times leading up to the December special election and 1,843 times for the April election. It should be noted that the candidates night forums were also viewed live and through the Needham Channel website. We are especially grateful to the Needham Channel for recording and broadcasting the voter service events and the two educational forums.

We have not sought donations this year from Town Meeting Members or local businesses for donations given the continuing economic hardships related to COVID-19. However, this option will be reconsidered for the next fiscal year as conditions change.

Part I: Activities – Programs and Projects 2021-2022

Educational Programs

- Held an in-person forum on "Affordable Housing in Needham: the Basics," which was also streamed live on Needham Channel (October 28).
- Held a virtual forum on "Feeding Our Students: a Look at Nutrition Services at Needham Public Schools, also streamed live (March 24).
- Held a LWV-Needham book discussion via Zoom videoconferencing on *The Making of America's Fury* by Evan Osnos (April 13).
- Coordinated the Meatless Monday Needham program to encourage eating less meat. Maintained a website, Facebook page, and monthly newsletter. Held a "Meatless Monday with Dave Becker" program (November 1) and a "Cook Along with Meatless Monday" with a local instructor (February 10).
- Collaborated with Needham Community Education to hold four fall classes and four spring classes for the community. Fall classes focused on the constitution. Spring classes focused on voting rights, the electoral college, equity/economic mobility post-Covid, and money in politics.
- Presented "How to Run for Office and Town Meeting" virtual workshop (January 10) and produced a companion guide; both available on LWVN website.

Needham Special Select Board Election (December 7)

- Produced a Candidates Night on Zoom with both candidates. Streamed live on Needham Channel and available for later viewing on our website.
- Produced a voter guide with both candidates' responses.
- Posted VOTE lawn signs around town.
- Co-produced with the Needham Channel several get-out-the-vote public service announcements (PSAs) shared via Facebook and Twitter.

Needham Local Election (April 12)

- Produced a Voter Guide with information about and responses on priorities from 16 of the 19 town-wide candidates and 173 of the 247 Town Meeting Member candidates. Published in the Needham Times and on our website. Hard copies distributed at the Senior Center and North Hill.
- Produced a Candidates Night on Zoom, with a forum for the one contested race and "meet the candidates" opportunity for uncontested positions. Streamed and shown on the Needham Channel.
- Co-produced with the Needham Channel several get-out-the-vote public service announcements (PSAs) shared via Facebook and Twitter for the Dec. and April elections.
- Posted VOTE lawn signs around town.

Town Meeting 2022

- Organized the New Town Meeting Member (TMM) Orientation on April 25 in person at the Center at the Heights. With 20 percent of TMMs newly elected this year, it was particularly important to hold this event. Attendees: 40.
- Organized and led Town Meeting Warrant Meetings on April 25 in person at the Center at the Heights and remotely. Attendees: over 150.

TMM 25-Year Awards

- Accepted responsibility from the Melick Foundation for presenting awards for TMMs with 25 years of service. Identified recipients, prepared framed certificates, and presented them at Town Meeting.
- The Melick Foundation provided the LWVN Ed Fund $5,000 to continue this activity for the long-term.

Study of Needham's Town Boards and Officers

- Presented LWVN consensus positions to the Select Board (November 23), who showed much interest and promised to involve us as they consider changes.

Study of Town Meeting Member Communications

- Surveyed town meeting members as to their communication needs—with each other, with town, and with constituents.
- Presented results to LWVN membership at January program planning meeting and to town Public Information Officer. Town officials have collected TMM emails and are considering best approach to improving communications.

Grants, Donations, and other income

- Received donations of $1,175 of Ed Fund (unsolicited, 5 donors).
- Used $500 grant from Roche Bros., originally designated for the 2020 Civics Bee, to fund the inaugural Civics Showcase. NOTE: This amount was carried over from prior budgets.
- Income from the endowment fund in FY 2022 has been reinvested.

Civics Education for NHS 11th Graders and NHS Scholarship

- Produced Student Advocacy Guide and eight companion videos on advocacy at state and local level; all available on the website. Shared with other leagues in MA.
- Planned Civics Showcase (June 11) as venue for students to present their advocacy projects at Powers Hall for government officials and the public. 113 students in 48 working groups have registered to participate.
- Awarded Needham High School Scholarship to two students. Although usually only one recipient, LWVN decided to award scholarships ($500 each) to the two founders of the LWVN Club at NHS (June 2021).

Special Expenses

- Costs of framed certificates for 25-year TMM awards ($288.49); offset by funds from Melick Foundation.
- Zoom add-on for one month of webinar capacity of 500 ($86.37).
- Civics Showcase – estimated expenses of $575; offset by $300 Scharfman grant this year and earlier Roche Bros. grant.

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Part 2: Finances

Assets, Liabilities, and Equity as of April 30, 2022

ASSETS		
Checking/Savings		
	Vanguard Endowment	$24,908.74
	Needham Bank checking	$10,085.66
	PayPal	$0.00
Total Checking/Savings		**$34,994.40**
Accounts Receivable		**$0.00**
TOTAL ASSETS		**$34,994.40**
LIABILITIES & EQUITY		
Liabilities		
	Accounts Payable	$0.00
	Grant for TMM 25 Year Certificate	$4,876.18
	Civics Bee prepaid grant for FY2022 use)	$500.00
Total Liability		**$5,376.18**
Equity		
	Perm. Restricted Net Assets (endowment)	$25,807.53
	Restricted endowment earnings (Vanguard)	$(898.79)
	Retained earnings	$4,533.31
	Net Income	$176.17
Total Equity		**$29,618.22**
TOTAL LIABILITIES & EQUITY		**$34,994.40**

Assets

The endowment, the "Needham LWV Endowment for Civic Awareness, Education, and Engagement" is currently invested in three Vanguard funds. The endowment has increased in value from $24,501.00 in FY21 to $24,908.74, an increase of $407.74 over the past year. The markets took a hit in 2022 due to economic factors including inflation and the Russian/Ukrainian war. The endowment in investment in Vanguard was started in September 2016 with an initial investment of $12,644.10.

For the endowment's first three years, the earnings on the endowment were reinvested. The Board decided to reinvest the earnings in fiscal year 2022. It will continue to decide yearly whether to reinvest.

There is $10,085.66 in the checking account as of April 30, 2022 (which includes the $5000.00 from the Melick Foundation). The checking account is funded by individual and business donations, income from sales and events, and grants over the past five years.

Equity

Restricted equity includes the endowment and its dividends. Retained earnings and net income represent funds raised in the prior and current fiscal years that can be spent at the discretion of the Board for LWVN-EF programs.

FY2023 Budget

The Board-approved LWVN-EF budget for the upcoming fiscal year (July 1, 2022-June 30, 2023) is below.

Fiscal Year 2023 LWVN-Ed Fund Budget

EDUCATION FUND BUDGET		FY23 BUD	FY22 Act - 4/30/22	*FY22 BUD*	*FY21 Actual*
INCOME					
	INVESTMENT INCOME	**$0**	$0	$0	$0
	CONTRIBUTIONS	**$1,200**	$1,234	$1,000	$1,105
	GRANTS	**$900**	$0	$800	$0
TOTAL INCOME		**$2,100**	$1,234	***$1,800***	*$1,105*
EXPENSE					
	ADMINISTRATIVE*	**$643**	$452	$588	$460
	FUNDRAISING	**$50**		$50	$28
	STUDIES	**$25**		$25	
	SCHOLARSHIPS	**$500**		$500	$1,000
	PUBLIC FORUMS	**$940**	$386	$1,005	$111
	VOTERS' SERVICE	**$450**	$219	$95	$515
TOTAL EXPENSE		**$2,608**	$1,058	***$2,263***	*$2,114*
NET INCOME		**($508)**	$176	***($463)***	*($1,009)*
** Expenses shared 50/50 with LWVN Budget*					

LWVN-EF Board

Carol Patey, President
Elizabeth Handler, Clerk
Kara Holmquist, Director
Karen Zarrow, Treasurer
Harriet Goldin, Director
Off Board: Budget Chair, Erica Bond

The LWV-Needham Board of Directors appoints the Ed Fund Board Directors. The President and Treasurer are members by virtue of their LWV-Needham offices.