Lucy's Legacy Foundation Annual Meeting: Tuesday, April 28th, 2026

In attendance–Shannon Fairly-Pittman, Kathryn Jones, Heidi Fanion, Rachael Basdekis, Carol Sullivan-Hanley, Robyne Hockett, Kyla McSweeney, Jeri Robinson, Pat Mucci Tayco, Sindy Greenberg, Tischa Brown, Topher King, Sigal, Bonnie Page, Debbie Crane, Sage Carbone, Jennifer Werb

Welcome from Shannon Fairly-Pittman at 6:03 p.m.

Why a Lucy's Legacy Foundation – History

- Formerly known as the Wheelock College Endowment Fund; started with the sale of the Lucy Wheelock Child Care Center in Roxbury, MA
- Wheelock College Endowment Fund was managed by the Endowment Fund Committee of the Alumni Association Board
- Endowment Funds were used to award grants and scholarships
- With the 2018 merger with BU, a vote was taken by alumni to keep these funds independent and managed by alumni; resulting in the formation of LLF in 2020
- Wilkins Investment Council, Inc. has managed the investments since 1999

Foundation's Structure:

- A non-profit corporation registered in the state of Massachusetts
- Mission is to support the educational and professional endeavors of individuals committed to improving the lives of children and families through scholarships and Grants
- Federal tax laws restrict how existing funds (from Endowment Fund) can be used
- This year we learned that we can only use these funds at BU–particularly for us we disperse our funds through BU Wheelock
- Business of the corporation is managed by a volunteer Board of Directors

Supporting Organizations:

- Wilkins Investment Council, Inc. independent investment advisor managing the foundation's investment accounts.They have managed the accounts from the endowment fund at historic Wheelock. They have managed the accounts for 25 years and focus on helping non-profits. The account is with Fidelity but Wilkins manages the accounts.

- Hemenway & Barnes LLP, providing nonprofit legal representation and grant making advice
  They give us a discounted rate and had a connection to historic Wheelock

- Livingston & Haynes, CPA., providing tax services

Impacts:
Voted as a board to decide how we can use the funds to give back to the Wheelock community. We are working very closely with BU Wheelock to help understand the needs of their current students. Here are our annual stats for the fiscal year ending March 31, 2026:

- Lucy's Legacy Graduate Scholarship - $83,000 scholarship to graduate students

- Lucy Wheelock Fellowship Fund - $25,000 pledge–gives money in honor of Lucy Wheelock. Stems from David Chard to help fund directly to folks who are working to directly impact the lives of children and family. We have a 4 year commitment and are in our third year of donating.

- Alumni Grants (based on the Marjorie Wolf Memorial Grant) – totalling $9,500. A way for us to give directly to Wheelock alum–each grant up to $3,500

- Wheelock Family Theatre Fund - $10,00 towards our $25,000 pledge

- Wheelock Family Theater Magic in the Wings 45th Anniversary Champion Donor- $5,000

- Financial support for the annual BU Wheelock Tea- $3,500

Opportunities to get involved:

- Attend BU Wheelock events

- Apply for a grant–or get the word out to others who have projects

    - Serve on the grant committee

    - Robyne welcomes more help to support the grant work

- Share your photos
    - Would be great to share at the tea and on the LLF website

- Hear from previous grant recipients:

    - Debbie Crane, 93' Stowe, MA: Music Together
        - Applied after hearing about it at the LLF tea
        - Working weekly with children and families with Music Together.
        - The grant was used to help support large ticket items such as gathering drums for each center.
        - Also were able to resonator bells, rhythm sticks, instruments, egg shakers

    - Michelle Chalmers, '90 Charlton, MA : Empowering METCO Students in Understanding Systemic Racism

    - Becky
        - Applied for a grant for large wooden stepping blocks and balance beams for their preschool playground.
        - They are amazing and the children have loved it!

Questions:

- Are we able to provide a receipt of whether or not we received the application and provide a timeline? Robyne is working on this in her new role as grants coordinator.
- Tischa asked what kind of photos we'd be looking for? Wheelock related or alumni out and about doing great things.
- Sage pointed out that there's no prompt on the board of directors page asking for input or opportunities to get involved, and doesn't have contact info on your profiles. Maybe that could change to let folks know that this is wanted / needed? She feels like it would be helpful to note that we are actively recruiting new members. She would like to know if there's a bylaw that says we need specific demographics. Our bylaws dictate that we need to have certain roles as part of the board.
    - Robyne invited folks to contact her via the Lucy's Legacy Foundation e-mail as she'd welcome more help with
- Pat asked if we could review the grant application guidelines to see if her alumni class could get funding to help with milestone alumni events.
    - Information on the website–there's a form to help the information we need including the funds requested.

    - The way the grant was built was to support a classroom, project, or initiative. Perhaps gathering as a group to do a service so that it would align with our guidelines.
- Why did the tea get moved to October?
    - BU Wheelock did not want the tea to be overshadowed by other events.
    - The staff would prefer that it is more of a special, isolated event.
    - We confirmed recently that it would be moved to October.
- Sindy asked if the grants support youth programs outside of the US?
    - She works for an organization that is in Israel working with youth who are struggling with emotional trauma.
    - American Friends of–raises money in the US to support the programs in Israel.
    - Challenges with currency and dispersing funds–we can consult with the lawyer to sort.
    - If the funds could be issued to you, then you can use them since she is based in Florida. You can apply as the alumni but not as a program so we'd be able to send the funds directly to you.
- Tischa is curious about the grant cycle.
    - It is currently a rolling cycle and we accept rolling applications.
    - Robyne will be contacting the individuals that apply for grants to help them through the process.
    - Two cycles throughout the year for disbursement but a rolling application process.
- If you are interested please drop your e-mails in the chat and we can help send you more information regarding applying for a grant.
- Applications are not just for educators! Community work, social work, child life, are all welcome!

The annual meeting was adjourned at 6:44 p.m.

Notes submitted by Rachael Basdekis, Lucy's Legacy Foundation Secretary