

OUR COMMUNITY. OUR FUTURE.



**The White Family
Foundation**

2018 ANNUAL REPORT

“A tree is known by its fruit; a man by his deeds. A good deed is never lost; he who sows courtesy reaps friendship, and he who plants kindness gathers love.”

— St. Basil (329-379)

Investing in the Community

Building for the Future

The White family and their company, Taco, Inc., planted their roots in Rhode Island more than 70 years ago. Since that time they have stood out as a company which not only values its employees and inspires leadership, but has mindfully woven the principles of volunteerism and philanthropy into the company culture. Emulating the scope of the White family's entrepreneurial and intrepid vision, the White Family Foundation, formally established in 2000, values its partnership with the philanthropic community because it believes that the vibrancy of the community makes the state a better place to build a business and grow a family.

The 2018 Annual Report represents a synopsis of the achievements of the White Family Foundation over the years and highlights the impact of its work and investment in the community. However, in order to build for the future, the Foundation took a strategic step in 2018 by temporarily suspending its grant making activity in order to undertake a reassessment

of the Foundation's strengths. In the process, the Board established a new set of guidelines, refined its focus, reinforced its best practices and set a new direction to take advantage of new opportunities. Most importantly, the Board realigned its grant-making processes to reflect its financial capabilities in order to remain a strategic partner in the community for years to come.



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MISSION STATEMENT

The White Family Foundation seeks to provide meaningful and strategic support for Arts, Education and Healthcare non-profit organizations serving our communities to enable their long-term success in and achievement of their missions.

Our Mission

Building on the legacy of philanthropy started by John Hazen White, Sr. and Happy White, Elizabeth and John Hazen White Jr. have continued, and extended, the White family mission of giving back to the community. It is an important and enduring obligation, and it is rooted in the bedrock family values of:

COMMUNITY,
which joins and sustains all of us.

COURAGE,
to stand up and make a difference for the betterment of the community.

FAITH,
which roots us in humility, compassion and hope.

INTEGRITY,
to be honest and ethical in all our actions.

OPPORTUNITY,
in providing the means and pathways by which individuals can improve themselves.

The White family is recognized in the Rhode Island community as a strong advocate for the Arts and always have expressed this passion through their philanthropy. John and Happy White knew that a strong philharmonic orchestra is an important tool of a rich and vibrant community and were lifelong supporters of The Rhode Island Philharmonic Orchestra and Music School. The Foundation continues this legacy and has been partnering with the Philharmonic Orchestra since 2010 to bring the

Rush Hour Series to the community along with the Bristol Summer Pops Concert held at Colt State Park on Labor Day weekend. Extending their advocacy for the Arts, the Foundation has helped bring exemplary Broadway shows to Rhode Island through its support of the Broadway Series at the Providence Performing Arts Center and for the last 15 years, has been an integral part of the growth and influence of Firstworks in expanding access to the arts and in the Providence community. Through the years, the Foundation's contributions to the growth and enhancement of the arts in the Rhode Island community has grown and the Foundation has provided over \$3,650,000 to all forms of artistic programming and services since 2010.

In the ensuing years, the Foundation expanded its reach into the community; became advocates of education through its support of scholarships at local secondary and higher educational institutions; and helped encourage underserved populations to reach for higher levels of education in the welding and culinary arts. The Foundation recognized the value in buoying communities through support of local educational and cultural activities as well as providing access to good healthcare by awarding grants to small, community based programs, centers and health clinics. Since 2010, the Foundation has contributed over \$3,340,000 to educational, cultural and healthcare programs and services in Rhode Island communities.



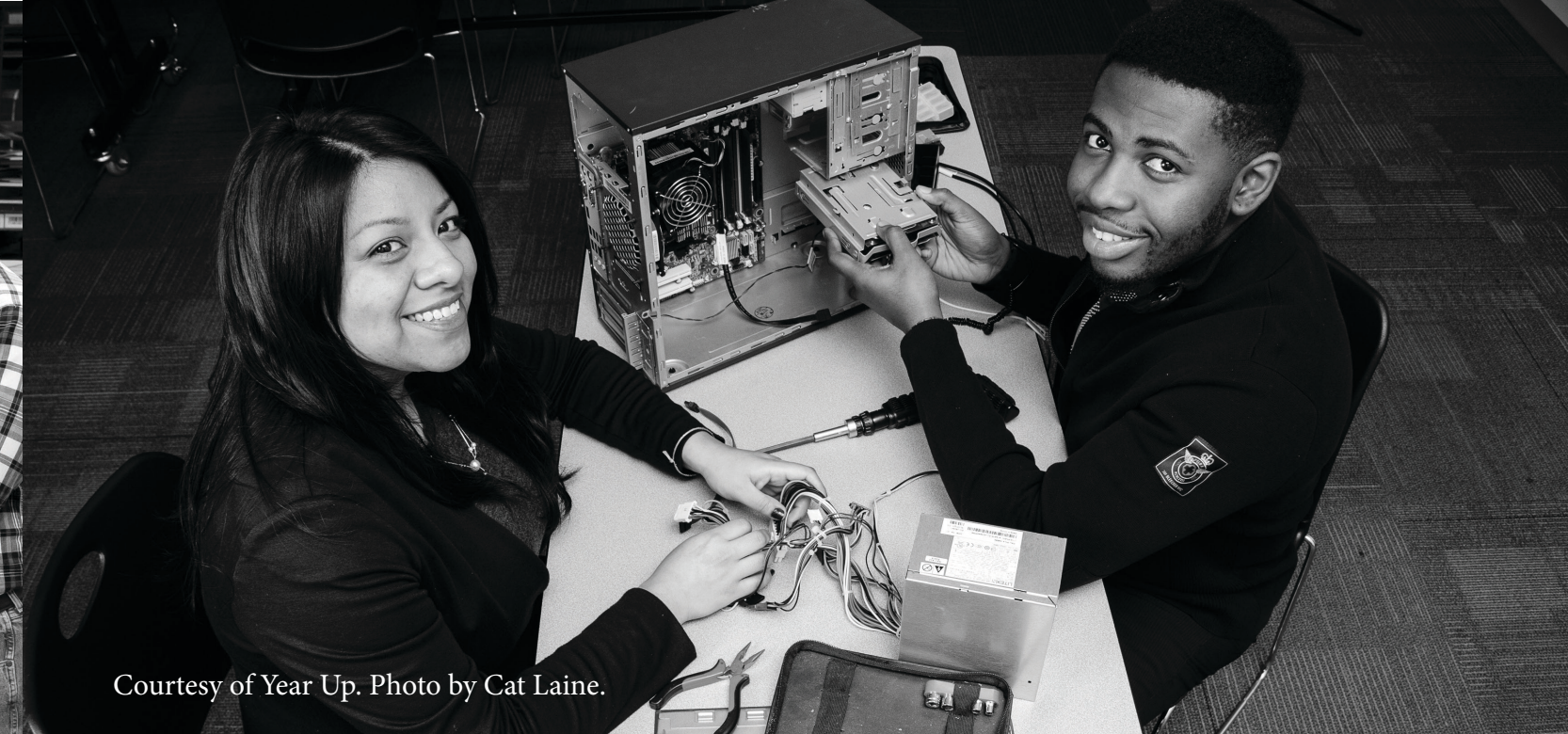
A RENEWED DIRECTION

With history forming a strong base on which to build for the future, the Board of Directors reaffirmed its commitment to investing in programs that have an impact in the arts, education and healthcare. The Foundation undertakes seriously its role as a strategic philanthropic partner in the community and in building possibilities and impacting change in diverse ways. Since 2000, the Foundation has chosen to focus on areas where they could make a difference and enrich peoples' lives. However, the White Family Foundation recognizes that a strategic partner has a responsibility to understand how grant-making does make a positive impact on the community's needs. Such an understanding means developing effective policies and procedures that are focused and flexible; establishing guidelines that are consistent for all applicants; clearly stating the priorities of the Foundation and articulating timelines for approving and awarding grants.

On December 19, 2018, the Board of the White Family Foundation announced two new guidelines to chart their course.

The Board of Directors of the White Family Foundation announces its effort to expand Taco Inc.'s Employee Charitable Grant Program which encourages philanthropic and volunteer support in the community among its employees by doubling the amount contributed from the Foundation to this effort.

Taco Inc. has a very diverse workforce and the retention rate of its employees exceeds industry average. It is not unusual for employees to work for more than 50 years at Taco Inc. because of its warm and supportive atmosphere. The White Family Foundation and Taco Inc. reinforces the volunteer efforts of its employees through the Employee Charitable Grant Program. Any employee is able to submit a proposal to the White Family Foundation to request support of organizations for whom they volunteer. Over the years, the program has supported such varied organizations as the Boys & Girls Club of Fall River; Hope Library, The Lafayette Band,



Courtesy of Year Up. Photo by Cat Laine.

The Autism Project, The MS Dream Foundation, Junior Achievement of SE Massachusetts, Pell Elementary School STEM Program, The Boy Scouts of America Troop 8, The Special Olympics, Year Up and Project Goal.

The Board of Directors for the White Family Foundation announces its intention to open its grant application process to community non-profits under new submission guidelines. The Foundation intends to focus its attention on supporting programs/projects and services that use art or artistic elements to enrich and strengthen the community.

The decision to focus on non-profit organizations that concentrate on programs/projects and services using art or artistic elements to enrich and strengthen their constituents or community is reinforced by the Foundation's grant-making history. The Foundation's support of local and diverse theatre groups such as

Mixed Magic Theatre and The RI Black Storytellers as well as educational artistic endeavors such as The Steelyard and AS220 and healthcare initiatives such as the therapeutic arts program at The Emma Pendleton Bradley Hospital shows the breadth of its knowledge and interest in how art and culture can improve lives and build community.

It is the Foundation's goal to reflect the family's legacy in its mission, values and grant-making practices. The new programmatic practices, approved by the Foundation Board on December 19, 2018, are intended to guide the grant review and grant submission process for the years ahead. The goals of successful programs/projects or services should include one or more of the following priorities: Art appreciation, Youth development, Leadership skills, Community empowerment, Cultural awareness, Skilled activities and Therapeutic life-skills. The Foundation encourages non-profit organizations who meet the Foundation's focus area and priorities and are interested in submitting a request for support to go to the website for complete details at **www.TheWhiteFamilyFoundation.com**.

The Grant Submission Policy

– A Snapshot

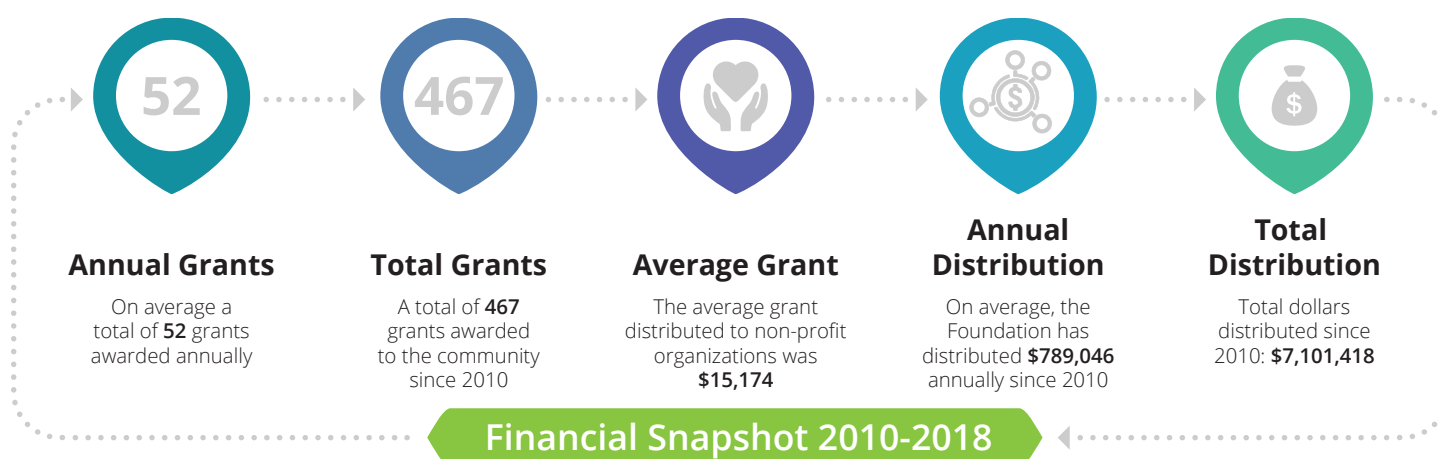
LETTER OF INQUIRY

The new guidelines request that non-profit organizations submit a Letter of Inquiry as a preliminary step to determine the Foundation's interest in the program, project or service. The LOI should be a thorough presentation of need or identified problem including the proposed solution and qualifications for implementing the program. The Foundation will notify the non-profit about the outcome of the organization's inquiry following the third quarter Foundation Board meeting.

APPLICATION

Once a non-profit is notified of the success of its Letter of Inquiry, the organization will be asked to submit an application along with the organization's 501(c) 3 IRS determination letter. Upon completion of the application, the Foundation will schedule a site visit to review the grant request. Applications will be reviewed at the fourth quarter meeting of the Foundation and successful grants will be awarded within the calendar year in which they have been submitted. All awardees are obligated to submit an annual report before applying for a second request.

Financial Activity 2010-2018



Although the Foundation took a respite from accepting new grant applications in 2018, it was very active in the community as a result of its on-going commitments to local non-profit organizations, company employees serving as volunteers and the involvement of Foundation Board members with many local non-profits. In 2018, the Foundation distributed over \$750,000 to the community adding to the almost \$7M it had distributed since 2010 throughout Rhode Island and Southeastern New England.

Over the years the Foundation has supported the non-profit community by awarding grants annually to hundreds of local organizations, large and small, as well as making significant multi-year commitments to help organizations achieve specific

goals. Between 2010 and 2018 the Foundation awarded multiyear grants totaling \$5,550,666 to local non-profit organizations supporting theatre, music, dance, scholarship, science, youth programs and therapeutic healthcare. Many local institutions such as the Emma Pendleton Bradley Hospital, the RI Free Clinic, Hope Hospice Care, the Providence Performing Arts Center, the Rhode Island Philharmonic, the University of Rhode Island, Wheaton College, Project Goal, St. Andrews, Community Prep, Firstworks and Trinity Repertory Theatre benefited from these long-term commitments. Over this same period, the Foundation also provided annual support for 418 individual non-profit organizations whose annual grant during this time averaged \$15,000.

Summary

The company, the family and the foundation place a firm emphasis on relationships. Taco's brand is associated with innovation, excellence, product-diversity and commitment to people. The White Family Foundation maintains the company's longstanding values in its work as it refines its policies and procedures and reframes its priorities. The Board looked to its strengths in the community and the passions of John and Happy White when it made the decision to serve Rhode Island and Southeastern New England through the lens of artistic programs/projects and services. The Foundation's support encourages art, and all its creative, entrepreneurial and innovative possibilities, to serve a broad and diverse community. The vision, first created by John and Happy White, of building the community while building the business continues to guide the Foundation in all its deliberations and be its guide star moving forward.



2018 GRANTS

AS220

Beat the Streets Providence

Boys & Girls Club of Fall River

Claiborne Pell Elementary School

Community Preparatory School

Cranston Policy Department

Friends Way

Hope Library

Junior Achievement of Southern Massachusetts

MS Dream Center

Oliva Fund at Milford Regional Medical

Project Goal, Inc.

Providence Performing Arts Center

Rhode Island Co-Parenting Education Services

Rhode Island Philharmonic Orchestra

St. Andrew's School

The Autism Project

URI Foundation

Wheaton College

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John H. White III,

Treasurer, The White Family Foundation

Latdavorn Bonilla,

Secretary, The White Family Foundation

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Vice President, Corporate Development,
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Latdavorn Bonilla,

Executive Administrative Assistant to President,
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The White Family Foundation

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