

SERVING ALL AGES AND ALL STAGES OF VISION LOSS



The Carroll Center
FOR THE BLIND



ANNUAL REPORT

FISCAL YEAR 2023: JULY 1, 2022 - JUNE 30, 2023

A LETTER FROM

Board Chair and President

Dear Dedicated Supporters, Partners, and Friends,

The greatest joy of being part of the Carroll Center for the Blind's team is seeing firsthand the resiliency and grace of a community united with our mission – our tireless and committed staff, Board of Directors, donors, ambassadors, volunteers, corporate and non-profit partners, legislative policymakers, and the individuals and families we are privileged to serve. This vibrant community of allies truly unites us and creates an environment where individuals of all ages and stages of vision loss can lead an independent and fulfilling life.

Some of our proud milestones this community helped us achieve last year include:

- Serving 2,100 clients from 19 states and 3 countries through more than 16,000 service hours.
- Partnering with 108 local school districts to serve 480 children and teens in their own school environment.
- Securing a \$500,000 state earmark to serve non-working older adults and children 13 and under.
- Partnering with the Toyota Research Institute on a research study investigating control preferences in fully autonomous vehicles among individuals who are blind or visually impaired.
- Helping to improve accessibility worldwide through the launch of Carroll Center Instructor David Kingsbury's book, *The Windows Screen Reader Primer: All the Basics and More*, accessed by more than 3,000 individuals on five continents.

Throughout this annual report, you will read a sampling of our accomplishments over the past year. In addition to these amazing success stories, we witness what we call "mission moments" every day, such as:

- Observing a young child walk effectively with a white cane for the very first time
- Experiencing the happiness of a young adults' transition to college



- Congratulating an adult client who has regained employment after losing their sight
- Working with an adult to secure housing and a new level of independence
- Watching the joy of a senior client as they text their grandchildren using new assistive technology skills on their iPhone

Reflecting on these moments, we are reminded of a beautiful Helen Keller quote, "Alone we can do so little; together we can do so much." We are so truly grateful to everyone who strengthened the Carroll Center this past year through gifts of your time, talents and resources that made these and other moments possible.

As we look ahead, we encourage you to support our great mission with an investment in brighter futures for our clients – young and old. Your gifts will help us create many more mission moments, or what our clients refer to as miracles.

Gratefully,

GREGORY J. DONNELLY
President and CEO

CAROL A. COVELL
Chair, Board of Directors

Our Programs

Community Services

Orientation & Mobility (O&M) training enables a person to know where they are, where they want to go, and how to get there safely and efficiently. We pair individuals who are blind or visually impaired with Certified O&M Instructors to deliver navigational skills for safe, independent travel in the home, workplace, college, and community.



Education Services

The Carroll Center's Teachers of the Visually Impaired (TVIs) work with children and teens who are blind or visually impaired in their public or private school. In collaboration with 108 school districts, our TVIs work with students on the Expanded Core Curriculum to ensure they make progress in the general education curriculum.



Summer Programs

The Carroll Center serves children and teens through six residential and day summer programs. Participants learn safe travel and assistive technology skills, develop their independence, gain valuable work experience, and participate in adaptive recreational activities, all while building self-confidence and meaningful relationships with peers.



Low Vision Services

As part of our low vision services, Certified Low Vision Therapists work with clients to identify assistive devices that can help them use their remaining vision and teach them how to use these devices and other techniques that will enable them to enjoy an enhanced quality of life.

Technology Training

The Center offers assistive technology programs that help blind and visually impaired individuals use technology proficiently for work, school, and leisure. In-person and remote programs are available in the use of speech output, screen magnification, braille, tablets, software applications, and smartphones.



Vision Rehabilitation Services

The Carroll Center's residential and day programs provide training that helps clients achieve or maintain personal independence and employment. Instruction includes orientation & mobility, assistive technology, home management and self-care, adjustment counseling, employment training, and experiential work internships.



CLIENT

Jim Duffy

The Carroll Center for the Blind creates lifelong opportunities for children, teens, and adults to achieve educational and professional success. Perhaps there is no better person to share his journey with the Carroll Center than Jim Duffy.

Jim was diagnosed at birth with Leber's Optic Neuropathy, an inherited disorder which causes vision loss. He arrived on our campus more than 30 years ago just before his 13th birthday to receive training in computers and

assistive technology. Jim recalls the week-long course that first exposed him to text to speech screen readers. During his years as a student in the Carver Public Schools, Jim had an extraordinary Carroll Center Orientation and Mobility (O&M) Instructor who provided him with white cane and safe travel support.

Carroll Center O&M Instructor, Joe Kolb, continued to provide Jim with O&M training while at Boston College and during his transition to employment,

helping him navigate public transportation challenges. Throughout his educational and professional career, Jim participated in multiple Carroll Center technology programs as technology advanced for the blind and visually impaired. Jim was employed for 20 years in telesales and communications for a benefits firm and credits the Carroll Center with giving him the skills and confidence to have a successful career.

Jim is grateful for the many services he has received at the Carroll Center, but he is particularly thankful for our newest job skills program, Screen Reader User Tester Training. Through this program, Jim was trained to be an accessibility user tester, which has positively impacted his technology skills. Due to his expertise in accessibility, Jim was hired in December 2022 as a Technology Skills Instructor at the Carroll Center.

Jim feels fortunate he can make an impact on the next generation of Carroll Center clients through assistive technology instruction. Jim tells us he learns from clients every day. "Working at the Center has opened my heart, educated me on what is really happening in people's lives, and taught me the importance of patience, perspective and compassion."

"Working at the Center has opened my heart, educated me on what is really happening in people's lives, and taught me the importance of patience, perspective and compassion."

— Jim Duffy



DONOR

Grant & Lara Gund

Commitment to philanthropy, particularly to organizations that support the blind and visually impaired, is a shared priority for Grant and Lara Gund.

This dedication is deeply personal to both of them. When Grant was two years old, his father, Gordon, was diagnosed with the inherited retinal disease, Retinitis Pigmentosa. By 1971, his dad was completely blind. Grant watched his dad cope with the loss of his sight, and how he channeled his energy toward finding cures for retinal degenerative diseases. Gordon and his wife, Lulie, founded the Foundation Fighting Blindness (FFB) to find treatments and cures for inherited retinal diseases. In the early days, the foundation required lots of help from family and volunteers. Grant remembers coloring pamphlets for holiday solicitations.

Lara first became involved with the visually impaired community through volunteer service with blind athletes during college. In 1995, Grant and Lara met at the Kellogg Graduate School of Management at Northwestern University and were married in 1998. They moved to the Boston area in 2000 where they have raised three children, Lucy, Owen, and Kelsey.

Outside of their careers, Lara at Harvard Business School, and Grant at Coppermine Capital, the private equity firm that he started with his brother, Zack, the Gunds

“The ability to work on orientation and mobility in a course designed by experts will prove invaluable for people experiencing vision loss or blindness. We love that the Carroll Center continues to seek innovative solutions to empower people of all ages affected by vision loss.”

– **Grant & Lara Gund**

have continued to volunteer and support organizations that serve the blind and visually impaired. Grant and his brother started The Cranberry Cup, an annual hockey tournament on Nantucket that will celebrate its 20th anniversary this month and has raised over \$2M for FFB and two other non-profit organizations. For eight years, Lara Co-Chaired FFB’s annual Seeing is Believing Ball at the Fairmont Copley Plaza in Boston. The family’s experience with blindness inspired their daughter, Kelsey, to volunteer at the Carroll Center, where she trained as a human guide and assisted with weekly events for residents. She also recruited her high school tennis teammates to participate in the Carroll Center’s Walk for Independence.

Living near the Carroll Center for the Blind, Lara recalls periodically seeing people from the Center walking with staff near the Newton campus working on their orientation and mobility (O&M) skills. Grant and Lara both know firsthand how critical O&M instruction is



for instilling a sense of independence in those who are blind and visually impaired.

When they learned about the Center’s desire to build an on-campus Orientation, Mobility and Wellness Trail designed to better prepare blind and visually impaired individuals of all ages to get instruction in a safe environment, they were extremely enthusiastic. Grant and Lara shared, “The ability to work on orientation and mobility in a course designed by experts will prove invaluable for people experiencing vision loss or blindness. We love that the Carroll Center continues to seek innovative solutions to empower people of all ages affected by vision loss.”

We are extraordinarily grateful to Grant and Lara Gund for their generous support that will make this campus-based learning experience a reality. Their impact will be felt for years to come.



Education Services Milestone!

Over the past 30 years, the Carroll Center for the Blind has provided invaluable education services for blind and visually impaired children and teens, allowing them to achieve their academic and extracurricular dreams.

This year, one of the Carroll Center for the Blind's six core programs, Education Services, celebrates 30 years of serving blind and visually impaired children and teens in their own school community. From each corner of our state, our Teachers of the Visually Impaired (TVIs) and Certified Orientation and Mobility Specialists (COMS) work in more than 100 school districts to provide individualized instruction to children who are blind or visually impaired to ensure they receive the necessary educational accommodations.

One of our dedicated Education Services professionals is Marissa Diedrick. Marissa always knew she wanted to work with children and she set her sights on teaching math. By happenstance, Marissa worked in a first-grade classroom with a boy who had a visual impairment during her last semester of school. Marissa was fascinated with the work of the child's TVI and shadowed her on her very last day of college. After that experience, Marissa enrolled in the Masters of Vision Studies at UMass Boston and began working at the Carroll Center after graduating in 2021. Marissa is passionate about the work she provides to support children and teens in their local school and shares, " Oftentimes students who are blind and visually impaired do not have the voice to get what they need. I want to be their voice."

Another member of our Education Services team is Melissa Mabee, a COMS who has made an impact on so many children. Melissa beams when talking about seven-year-old Finn Carlson, a second grader in the Natick Public Schools. The Carroll Center first came into Finn's life when he was in kindergarten, and Melissa has helped him navigate a new school, new teachers, and supported his ability to access everything from his classroom to gym class to playground structures.





Finn's mother, Shannon, recalls one small act by Melissa that has forever impacted her and Finn. After the school department commissioned an artist to paint a mural of students, Melissa asked the artist if he could put a cane in the hand of one of the characters so that every student is represented. The artist took Melissa's suggestion and brought Finn to life in the mural - right down to his light brown hair, sweet smile, glasses, and white cane. Finn was thrilled and even got to help paint it!

Shannon shared how much this mural means to Finn and how Melissa's commendable effort made this possible. "Melissa gave Finn the confidence to navigate a world that is very confusing to him. Without Melissa, he would not be as confident, he would not explore the way he does, and he would not know that it is safe to explore - and he is only seven years old."

All of us at the Carroll Center for the Blind thank our current and former Education Services staff members for the impactful work they do to change students' lives each and every day. Congratulations on 30 years of tremendous service!

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– Shannon (Finn's mother)



John Cataldo



John A. Cataldo's support of the Carroll Center has spanned nearly 40 years and the gifts he made during his lifetime make him the largest and most impactful supporter we have had since our founding. Throughout this time, John's gifts remained anonymous. The only affirmation John needed was that he was helping to transform the lives of those who are blind and visually impaired. With his recent passing at age 97, and with the blessing of his family, we now may celebrate

his life and contributions with our larger community.

John was a first-generation Italian American raised in the diverse community of Boston's West End. John enrolled in Tufts University's Engineering program at the age of 16, where he was the youngest participant in the naval ROTC program. He served in the U.S. Navy as a commissioned officer aboard the USS Montpelier in the Pacific Theater where he participated in the liberation of the prison camp at Wakayama and witnessed the devastation of Hiroshima. After the war, John began a career as a civil engineer at Volpe Construction Company and Aberthaw Construction Company where he managed projects along the entire East Coast,



including Boston landmarks such as One Boston Place and the Christian Science Center. In 1978, he began a lifelong partnership with Arturo Gutierrez. They

developed and built commercial office space, research facilities, and other projects throughout the Boston region, several of which can be seen today from Route 128.

Despite achieving financial success and his prominent role in the development of the Boston area, John remained humble, living until the end of his life in the same small house in Arlington he and his wife, Elaine, purchased with GI loans in 1955. John took quiet pride in his philanthropy, some of his largest donations exemplifying Maimonides' belief that charity is most blessed when it is anonymous.



John's connection to the blindness community began early on when he was inspired by a family member and a member of his church who were both blind. Neither let their blindness stop them from living their lives to the fullest. Through his interactions with them, he became dedicated to supporting the Carroll Center to enable more blind and visually impaired individuals to lead independent and fulfilling lives.

“John’s smile, soft voice, sense of humor and giant heart will be a memory that I will never forget and one that motivates me daily to continue our great work with passion and unwavering commitment. I am so grateful to have known such a virtuous and selfless man.”

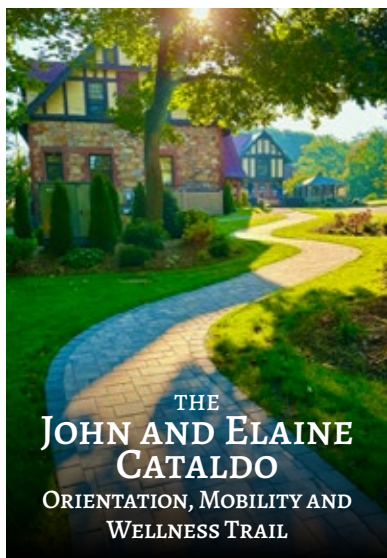
– **Greg Donnelly, President and CEO**

In 2020, the Carroll Center embarked on our first comprehensive fundraising campaign - **Generations, A Campaign for The Carroll Center for the Blind**. In typical John fashion, he was eager to support our efforts and made the very first lead and transformational gift to the campaign that has inspired many others to follow in his footsteps. But John didn’t stop there. John cemented his commitment to the future success of the Carroll Center by leaving a \$3 million bequest in his will. Half of this transformative gift will be added to the Center’s endowment, which will ensure the Carroll Center is prepared to help future generations of people who are blind and visually impaired.

John passed away in April 2023 and leaves a tremendous legacy of dedication and commitment to the Carroll Center that will continue to be crucial to those we serve. To honor John and the incredible impact he

has made, the Carroll Center will name our new instructional training trail in his and his wife’s memory: **The John and Elaine Cataldo Orientation, Mobility and Wellness Trail**. This trail will serve as an innovative tool for teaching white cane, guide dog and navigational techniques to people who are blind and visually impaired on the Carroll Center’s campus in Newton.

“Meeting and knowing John over the last seven years has been a highlight of my role,” recalls Greg Donnelly,



President and CEO. “John had an unbridled generosity, but it was his sincere kindness that shined at each memorable encounter. John’s smile, soft voice, sense of humor and giant heart will be a memory that I will never forget and one that motivates me daily to continue our great work with passion and unwavering commitment. I am so grateful to have known such a virtuous and selfless man.”

Thank you, John, for your impact that will span generations, ensuring countless more individuals who are blind and visually impaired gain the skills and obtain the training needed to live fulfilling and successful lives.

TECH & INDEPENDENCE

Technology has taken accessibility to the **next level.**

In a world that is constantly evolving, the power of technology knows no bounds. It has the unique ability to touch and transform the lives of individuals from all walks of life, but has particularly enhanced the independence of people with visual impairments. At the Carroll Center for the Blind, we are unlocking the power of technology to transform the lives of those we serve.

Technology has taken accessibility to the next level. For individuals who are blind or visually impaired, voice activated thermostats, smart locks, and medical devices can provide greater control making daily life more manageable. The Carroll Center for the Blind has been at the forefront of providing technology training across its programs, working to instill in all those we serve a pathway towards independence.

Our Low Vision Clinic allows our team of vision professionals to train clients to use their personal devices to maximize their remaining vision. Our Education and Rehabilitation teams work with children, teens and adults to successfully equip blind and visually impaired individuals to access and utilize technology strategies designed to

improve their educational and employment outcomes. Our Technology Services department provides one-on-one training that can occur during a singular training session or as long as several weeks with the goal of ensuring the successful access and independence of those blind and visually impaired clients they support.

When Kevin Trainor, Founder and President of Bay State Property Management, began to struggle more with his loss of vision due to Retinitis Pigmentosa, it was the Carroll Center's Technology Services team who provided him with the support he needed. Kevin spent two weeks working with his Carroll Center Technology instructor who made him aware of all that is possible for him. Kevin shares that upon returning to his office, what he learned at the Carroll Center was "life-changing." He tells us, "I am significantly more productive now with less sight after my tech training at the Center than I was when my vision was better."

Kevin's success story underscores the importance of the Carroll Center's vocational programming and dedication to embracing new technologies. Independence is a fundamental right for all, and our technology programs help to advance inclusivity and accessibility and make independence a reality for more people with vision loss.



Honor Roll of Donors

\$100,000 and above

John A. Cataldo*
Flatley Foundation
Flora Nichols Beggs Trust
Grant and Lara Gund
Paul R. Sheehan Trust

\$50,000-\$99,999

Chris and Jill Babcock
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Level Access
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Martha Steele and Robert Stymeist*
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Harvey and Mary Wolfman



The White Cane Legacy Circle recognizes donors who have demonstrated a commitment to the future success of the Carroll Center through a gift in their estate plans. Planned gifts are an important source of financial support and sustainability for the Carroll Center, and this circle pays tribute to the white cane that provides support and independence to so many individuals living with vision loss.

WHITE CANE LEGACY CIRCLE DONORS:

| | |
|---------------------------|-----------------------------------|
| Estate of Michele Aldrich | Jeffrey D. Harris |
| Anonymous | Tom and Deborah McGrath |
| Chris and Jill Babcock | William Raeder |
| John A. Cataldo | Diane Scalfati |
| Diane Chatigny | Estate of Fred Silver |
| Deborah Coogan | Martha Steele and Robert Stymeist |
| Carol Covell | Maryann and Tim Sullivan |
| Anonymous | Rosellen and Jack Sullivan |
| Mary Hanna | |

*Donors who have remembered the Carroll Center for the Blind in their personal estate plans.

\$5,000-\$9,999

Adelaide Breed Bayrd Foundation
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 Americo Francisco Fund, Estate & Realty/Charitable Trusts
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\$1,000-\$2,499

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\$500-\$999

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 Martha Hanlon
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 Stanley Zimmering



*Donors who have remembered the Carroll Center for the Blind in their personal estate plans.

Financials

STATEMENTS OF FINANCIAL POSITION

| For the Year Ended | June 30, 2023 | June 30, 2022 |
|--|----------------------|----------------------|
| ASSETS: | | |
| Current assets | \$ 3,321,900 | \$ 4,620,200 |
| Investments | 5,133,700 | 3,960,400 |
| Long-term contributions receivable | 218,500 | 98,200 |
| Property, plant, and equipment | 3,775,200 | 3,480,400 |
| Other Assets | 100,800 | 114,300 |
| Total Assets | \$ 12,550,100 | \$ 12,273,500 |
| LIABILITIES AND NET ASSETS: | | |
| Liabilities: | | |
| Current liabilities | 453,800 | 626,300 |
| Operating lease obligations | 8,100 | 11,400 |
| Annuity obligation | 73,300 | 86,900 |
| Total Liabilities | 535,200 | 724,600 |
| Net assets: | | |
| Without donor restrictions: | | |
| Undesignated | 819,000 | 1,285,100 |
| Net investment in plant | 3,775,200 | 3,480,400 |
| Designated by the Board for operating reserves | 1,415,000 | 1,395,000 |
| Comprehensive campaign | 2,450,000 | 2,095,900 |
| Designated by the Board for endowment | 1,953,800 | 1,841,700 |
| | 10,413,000 | 10,098,100 |
| With donor restrictions: | | |
| Perpetual in nature | 732,900 | 732,900 |
| Purpose restricted | 640,400 | 500,400 |
| Time restricted | 229,600 | 217,500 |
| | 1,602,900 | 1,450,800 |
| Total Net Assets | 12,015,900 | 11,548,900 |
| Total Liabilities and Net Assets | \$ 12,550,100 | \$ 12,273,500 |

STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS

| For the Year Ended | June 30, 2023 | June 30, 2022 |
|-------------------------------------|----------------------|----------------------|
| REVENUES: | | |
| Program services | \$ 4,796,600 | \$ 4,993,100 |
| Contributions, events, and bequests | 2,860,000 | 2,901,000 |
| Investment and other | 231,500 | 19,100 |
| Total Revenues | 7,888,100 | 7,913,200 |
| EXPENSES: | | |
| Program services | 5,236,600 | 5,132,300 |
| General and administrative | 1,356,000 | 1,354,600 |
| Fundraising | 828,500 | 804,600 |
| Total Expenses | 7,421,000 | 7,291,500 |
| Change in Net Assets | 467,000 | 621,700 |
| Net Assets - Beginning of Year | 11,548,900 | 10,927,200 |
| Net Assets - End of Year | \$ 12,015,900 | \$ 11,548,900 |

BOARD OF DIRECTORS

| | | |
|------------------------|-------------------------|----------------------------|
| Carol A. Covell, Chair | Umesh Kurpad | Taraneh Satvat |
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Get Involved. Transform Lives.

Support

No matter how you choose to support the Carroll Center for the Blind, you will have a direct impact on our clients and their families. There are a number of ways to give to the Carroll Center, depending on your philanthropic goals.

Annual Gifts

Support for the Carroll Center's annual fund powers critical programs across the organization and forms the solid foundation from which we can launch innovations that advance the field of vision rehabilitation. Making an annual gift of any size every year is a meaningful way you can have an ongoing impact on the clients and community we serve.

Leadership Gifts

With a gift of \$2,500 or more, you'll join a generous group of Carroll Center donors as a member of the **Philanthropy Circle of Independence**. The Carroll Center's leadership giving circle, the Philanthropy Circle of Independence, consists of six recognition levels honoring increasing degrees of philanthropic leadership at the Carroll Center.

Walk for Independence

On June 3, 2023, 400 community members walked to show their support of the Carroll Center's mission at the Walk for Independence, collectively raising more than \$250,000 for our organization. Join us for next year's Walk on Saturday, June 1, 2024 at UMass Amherst, Mt. Ida campus, Newton.

Volunteer

Volunteers play a critical role at the Carroll Center working directly with clients, helping with administrative tasks or events, or supporting our facilities team to take care of our beautiful campus. Individuals, corporate groups and others are welcomed to spend a day, implement a short-term project, or have a recurring role where you can make a difference to our organization and the clients we serve.

Planned Gifts

The **White Cane Legacy Circle** recognizes donors who have expressed their loyalty and gratitude to the Carroll Center for the Blind in their estate plans. Planned gifts can be made with a bequest in your will or revocable trust, by beneficiary designation in a retirement account, life insurance policy or investment account, or through other types of planning arrangements.

Ready to make a gift? Donations can be made online at www.carroll.org/donate, via the QR code to the right or by check using the enclosed envelope. We also accept gifts made through your Donor-Advised Fund or gifts of appreciated investments such as stocks, bonds, or mutual funds. Please contact development@carroll.org or 617-969-6200 x259 for questions or more information about how to get involved at the Carroll Center.





PATHWAY TO INDEPENDENCE



The Carroll Center

FOR THE BLIND

The Carroll Center for the Blind empowers those who are blind or visually impaired to achieve independence and to lead a fulfilling life.

www.carroll.org