



# Facing Our Common Future

The Boston Foundation  
2010 Annual Report



## About Our Cover

Look closely at our cover, a photo mosaic made up of the faces of hundreds of members of the Boston Foundation's family—staff, board, donors, grantees, civic leaders and those served by the grants we make. The girl's face is that of Deysi Kelly, who participated in a summer program on Thompson Island run by Boston After School and Beyond and supported by the Boston Opportunity Agenda to reduce summer learning loss.

Photo by Richard Howard Cover Design by Kate Canfield

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*This year's Annual Report features a series of conversations about the progress we would like to see in our city and region.*

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## Letter from the Chair

One who has the privilege of serving as Chair for the Board of Directors of the Boston Foundation, cannot help but be impressed by both the breadth and depth of the Foundation's impact on our community, much of which is set forth in this Annual Report. I thank two constituencies who make this possible. One is the Foundation's generous donors who support the Permanent Fund for Boston, which makes our Greater Boston grantmaking possible, as well as those who give to the Civic Leadership Fund and make grants through their Donor Advised Funds. These financial resources permit the Foundation to do all that it does so well. We are extremely grateful to all of you for that support. Second, I thank the excellent staff of the Foundation under the extraordinary leadership of Paul Grogan and his team. Even during today's difficult fiscal times, when austerity is required of all organizations, the staff of the Foundation continues to launch exemplary initiatives and produce solid results.

Over the past year, to mention only a few of its many accomplishments, the Foundation was instrumental in the passage of a landmark educational bill which was the basis for the Massachusetts success in the Race to the Top national competition. The Boston Indicators Project continued to refine the civic agenda for Boston. The Boston Opportunity Agenda established a collaborative for education amongst several major charities. The Haiti Fund, launched by our staff in the wake of the devastating earthquake, raised in thirty days over \$1,000,000 to match a very generous gift of the same amount from one of our donors. All of these activities—and there are many more, too numerous to mention here—occur only because of the hard work of our staff and the quality of its leadership. I am immensely proud of all of them. Thank you!

An additional pleasure of serving as Chair of the Board is the opportunity to work closely with my fellow Directors. I am proud to note that we have an excellent Board, comprised of individuals who have many demands on their time but who lend their experience and leadership to the activities of the Foundation with enthusiasm and selflessness. It is in that spirit that I want to express my thanks to two Directors who retired from our Board during this past year—Dick DeWolfe and Lou Casagrande. Their contributions to our agenda, Dick as Chair of the Board's Development Committee and Lou as a member of our Program Committee, were exemplary and they will both be missed. It is also my pleasure to welcome three new Directors to our Board—Michael Eisenson, Rev. Gregory Groover and Sandra Edgerley, each of whom bring a strong background in business and nonprofit service which will be of great assistance to the Foundation. We welcome them aboard and I thank them, in advance, for their service!

I close this letter by noting that as a community foundation, our goal is to serve this community. That is our mission: to ensure that our residents are successful and thrive, and that our communities are vibrant, safe and affordable. Please join us in that effort, and thanks to all of you for your assistance.

Michael B. Keating, Esq.  
Chair, Board of Directors

# Report of the President

In five years, the Boston Foundation will celebrate its 100th Anniversary. While it's true that five years can go by very quickly, it's also true that a tremendous amount can be accomplished in that time span. Just think about the changes we have experienced on the national stage since 2005.

Over the course of the next five years, today's Boston high school students will have graduated and, if the Boston Foundation has anything to say about it, already be succeeding in a four-year college or other higher education program. Those in college now will be launching their careers.

As we thought about the Foundation's approaching centennial, we decided to ask a diverse group of people—including students who either are attending the Boston Public Schools or graduates of the system—to talk with us about the issues they care about most and help us set some goals for 2015. We organized these conversations around the Boston Indicators Project's civic agenda, which sets ambitious benchmarks for Greater Boston and the region.

What you will find when reading this report is that all of the issues explored are deeply interrelated—and many are dependent on a goal that we at the Boston Foundation have embraced: closing the achievement gap in our schools.

There are a number of topics about which the Boston Foundation maintains a largely neutral position. Public education is not one of them. We do not believe that dramatic gains in student performance can be made without changing a number of current practices. For instance, mounting evidence about the importance of a longer school day, including a report that we released just this year, is too substantial to be dismissed.

Cities at their best are tremendous generators of upward mobility. And this year, the Boston Foundation played a central role in making that happen for Massachusetts. Through the Race to the Top Coalition, which we convened, we helped to pass a pioneering bill designed to close the achievement gap across our state. That legislation, which was signed by the Governor in January, was key to the Commonwealth's successful bid for the \$250 million in federal Race to the Top dollars announced in August.

This year, the Boston Opportunity Agenda was launched—an unprecedented partnership among the Boston Foundation and Boston's three other major charities, as well as the City of Boston, the Boston Public Schools and a number of large private foundations. The Agenda's goal is to strengthen an education pipeline that begins with early childhood education and continues through post-secondary achievement. No other major American city has approached education in such an ambitious and comprehensive way.

I hope you enjoy reading this report and that you will join us in our quest to re-imagine not only education, but other important areas of community life, such as workforce development, health, affordable housing and improvements to our infrastructure. The dreams of our young people—and the future for all of us—depends on our success.

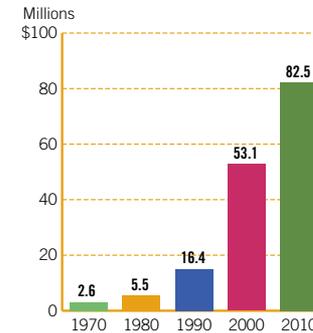
Paul S. Grogan  
President and CEO

# 2010 at the Boston Foundation

In 2010, the Foundation receives almost \$83 million in gifts and makes more than \$82 million in grants—and the Civic Leadership Fund tops \$1.2 million. Here are just a few highlights of a remarkable year:

## Topping \$1 Billion in Grants Through the Decades

Grants of more than **\$82 million** are made by the Boston Foundation and its donors during 2010—some \$30 million more than just a decade ago

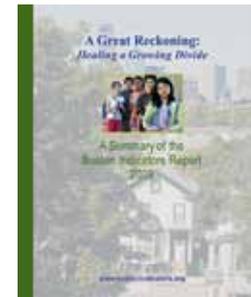


## A Historic Boston Opportunity Agenda

An **unprecedented partnership** among Boston's major charities and the City of Boston commits an initial **\$27 million for an education pipeline** spanning early childhood through adulthood

## Boston Indicators Report

**A Great Reckoning: Healing a Growing Divide** warns of a receding American dream for low-income families and stresses the importance of public education



## Thriving People. Vibrant Places.

The first year of grantmaking under a **new strategic framework** features an increase in operating support to highly aligned nonprofits

## A Partner in the Fairmount/Indigo Line

The Boston Foundation is a partner in this transformational effort, pledging more than **\$1 million over the next five years** to a project that will offer 90,000 people transit and build a string of new urban villages



## CHAMPS Boston

A new Boston Foundation initiative focuses on “Youth Development Through Sports,” emphasizing great coaching, equipment and facilities



### The Haiti Fund at the Boston Foundation

Launched in the wake of the earthquake, the fund supports relief and reconstruction in Haiti. More than **1,300 people contribute some \$2.15 million** and grants of \$400,000 are made

### My Summer in the City 2010

Some **20,000 young people are engaged in positive activities** with \$550,000 in grants to 87 community-based organizations



### StreetSafe Boston

StreetSafe Boston moves to new headquarters in Jamaica Plain and increases staff to 20 Streetworkers and five Program Coordinators, all working in the city’s most violence afflicted neighborhoods to **reduce gun violence** and guide gang members toward positive alternatives

### The Catalyst Fund

A new \$1.7 million fund is unveiled by the Boston Foundation and three other partners to **help local nonprofits work together**, or even merge, to better serve their communities

### Healthy People/Healthy Economy

This new coalition is launched by the Foundation and the New England Healthcare Institute with the goal of making Massachusetts the **national leader in health and wellness**



### Race to the Top Coalition

INVESTING IN OUR STATE'S CHILDREN



### A Winning “Race to the Top”

The Boston Foundation-convened **Race to the Top Coalition** helps to pass historic education reform and win **\$250 million in federal education dollars for the state**

# Board of Directors



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*Pastor*  
Historic Charles Street A.M.E Church



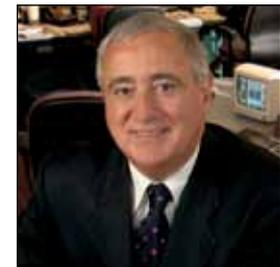
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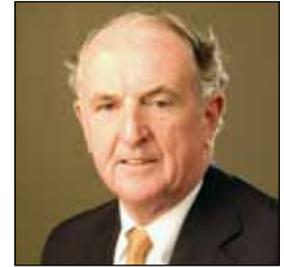
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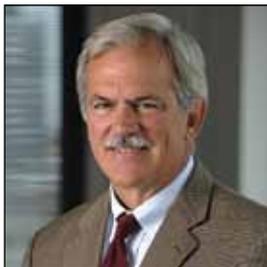
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Wellington Management  
Company, LLP



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Chair  
U.S. Corporate Practice,  
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President and CEO  
The Boston Foundation  
Ex Officio

*The Boston Foundation is overseen by a 21-member Board of Directors, selected to represent the broad diversity of our community's interests and needs. All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.*

## Officers

**Michael B. Keating, Esq.**  
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Leo V. Quigley, *Senior Program Officer*  
Jessica del Rosario, *Program Officer*  
Andrea M. Martinez, *Program Officer*  
Daniel Sherman, *Program Officer*  
Corey L. Davis, *Grants Manager*  
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Marta Rivera, *Service Delivery Manager, StreetSafe Boston*  
Loh-Sze Leung, *Director, SkillWorks*  
Caroline Hostetter, *Impact Associate, StreetSafe Boston*  
Patricia Maguire, *Program Associate, SkillWorks*  
Franklin C. Shearer, *Program Associate*  
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Diane Ivey, *Administrative Coordinator, StreetSafe Boston*  
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Alan R. Jutras, *Accounting Manager*  
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Glen F. Davis, *Human Resources Manager*  
Lauren C. Baker, *Office Manager*  
Anna A. Gallo, *Receptionist*

# Our Mission

**A**s Greater Boston's community foundation since 1915, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone. It fulfills this mission in three principal ways:

- 1 Making grants to nonprofit organizations and designing special funding initiatives to address the community's critical challenges;
- 2 Working in partnership with our donors and other funders to achieve high-impact philanthropy; and
- 3 Serving as a civic hub and center of information, where ideas are shared, levers for change are identified, and common agendas for the future are developed.

## Our Value Statement

In everything we do, we seek to broaden participation, foster collaboration and heal racial, ethnic and community divisions.

## Our Strategic Focus on People and Place

All of the work of the Boston Foundation is guided by two main strategic goals that reflect our deep commitment to strengthening our communities:

{ Greater Boston residents are successful and thriving. }

{ Greater Boston communities are vibrant, safe and affordable. }

Through these goals, we seek to have a profound impact on important areas of community life—including dramatic improvements in education and health attainment; safe and vibrant neighborhoods; robust arts and cultural opportunities; and a regional economy that enables everyone to thrive.

## Our Governance and Staff

The Foundation is overseen by a 21-member Board of Directors, selected to represent the broad diversity of our community's interests and needs, and more than 50 staff members who work closely with donors, grantees, civic leaders and community residents to have a positive impact on Greater Boston and our region. The staff includes professionals in the areas of grantmaking, philanthropy, finance, administration and communications.

# Understanding the Boston Foundation

**Major Funder of Nonprofit Organizations / Flexible Giving Vehicle for Donors / Civic Leader and Convener**

## Major Funder of Nonprofit Organizations / Our Grantmaking in Greater Boston

Through our competitive grantmaking in Greater Boston, the Boston Foundation supports organizations across a broad range of issues, while being guided by our strategic focus on people and place.

This grantmaking is made possible through the generous support of numerous donors who have contributed to the Permanent Fund for Boston, which has been built by hundreds of donors since 1915 to meet the changing needs of our community.

The Boston Foundation offers large, multi-year General Operating Support Grants to nonprofit organizations whose missions are closely aligned with the Foundation's goals and objectives. We also offer Project Support Grants for specific programs that reflect our goals, Special Opportunity Grants for new ideas that tackle long-standing or emerging community challenges, and other types of grants and support. The Foundation works closely with the nonprofit organizations that receive grants and all of the communities we serve (*see How to Apply for a Grant on page 52 for more*).



## Flexible Giving Vehicle / Customizing Charitable Solutions, One Donor at a Time

The Boston Foundation creates a giving plan to fit each of our donors—whether they are just beginning their philanthropic journey or possess a high level of clarity and sophistication. We pride ourselves in marrying our donors' aspirations and passion for giving with our deep understanding of the important issues facing our communities.

Through Donor Advised Funds, our donors make unlimited grants anywhere in the United States or abroad. These funds operate much like a private foundation, without the administrative or payout burdens. As a Donor Advised Fund expert for more than 30 years, the Foundation works closely with our donors to create positive change for the causes they care most about.

The Foundation also offers funds that allow donors to invest in the future of Greater Boston and the issues and organizations that have a profound impact on their lives—through gifts or bequests to the Permanent Fund for Boston, Boston's primary endowment fund, or Field of Interest Funds that benefit from a particular issue. In addition, the Foundation has a number of Designated Funds that provide annual support to many of our city's most important nonprofit organizations. (*See Becoming a Donor on page 54 for more.*)

## Civic Leader and Convener / Changing the Conditions That Challenge Our Region

Over the last decade, the Boston Foundation has become a major civic leader for Greater Boston and our region—with crucial support from the Civic Leadership Fund at the Boston Foundation, which raised

more than \$1.2 million this year. We conduct this work through a formula that is working:

- Cutting Edge Research
- Major Forums and Convenings
- Strategic, Proactive Grantmaking
- Task Forces and Coalitions
- Communications and Media
- Deep Public Policy Work

Through our *Understanding Boston* series, we identify challenges facing our city and region, commission fresh research and share information through a series of popular forums that are attended by thousands of people every year. The Foundation also is known for using strategic,



proactive grantmaking to strengthen its civic leadership work and forming task forces and coalitions of experts dedicated to fulfilling powerful agendas for change. Through all of these strategies, including working closely with the media to encourage in-depth coverage

of key issues, we engage in deep public policy work in partnership with other civic leaders and policy makers. Over the years, our civic leadership has had a profound impact on public education, smart growth housing, fiscal issues for municipalities, health—and other areas of critical importance to the people of our city and region.

The Foundation also sponsors the *Boston Indicators Project*, which provides a comprehensive, constantly-updated body information about every aspect of life in Greater Boston through bold, groundbreaking reports and an award-winning state-of-the-art website at [www.bostonindicators.org](http://www.bostonindicators.org).

## More than \$25 Million in Funds Leveraged in 2010

As Greater Boston's community foundation, the Boston Foundation is in a unique position—at the center of this region's philanthropic and nonprofit sectors—which enables it to leverage millions of dollars in outside resources for the benefit of the city and region. In 2010:

**Close to \$10 million was received by the Foundation for special initiatives**, such as those in the areas of college success, youth mentoring and gang violence prevention, workforce development and Haiti earthquake relief.

**More than \$2.3 million was raised for SkillWorks** from private and public sources to address critical issues of the city's workforce development system toward the overall goal of \$10.5 million over five years.

**Some \$1.83 million was generated by collaboratives housed at the Foundation**, including \$932,000 for English for New Bostonians; \$357,000 for the Boston Schoolyard Initiative; \$329,000 for the Achieving the Dream higher education funder collaborative; and \$160,000 for Social Venture Partners-Boston.

**More than \$2.6 million in co-funding came from Boston Foundation donors** to strengthen the impact of the Foundation's Discretionary grantmaking in Greater Boston.

**More than \$12.4 million in Donor Advised Fund grants** were directed to organizations supported by Discretionary Funds during 2010.

**More than \$2 million was raised for the StreetSafe Boston initiative** to address the troubling youth gang violence issues in our city, with more than \$10.8 million pledged overall.

## Program Related Investments Have Leveraged \$480 Million

In 2002, the Boston Foundation's Board set aside \$10 million from the principal of the Permanent Fund for Boston for Program Related Investments (PRIs). Investments to date include \$6.5 million in PRI loans for housing, neighborhood stabilization and energy retrofits, and \$2.5 million in loan guarantees for the construction of charter schools. These investments, made in partnership with other funders, have helped finance more than 2,685 units of housing and 16 charter schools and contributed almost half a billion dollars in total development costs.

# Facing Our Common Future Dialogue Participants



## Voices of Boston's Youth

(From left) **Nnennaya Igwe**, Sophomore at Simmons College **Thomas Nguyen**, Sophomore at UMass Boston  
**Roxanne Taylor**, Freshman at Suffolk University **Samantha Brea**, Senior at Snowden International High School  
**Waldy Nova**, Senior at West Roxbury Parkway Academy of Technology and Health **Jessica Sandell**, Senior at John  
D. O'Bryant High School **Fabrice Montissol**, Senior at Brook Farm Academy

## An Open, Dynamic Civic Culture

**John Hamill**, former Chairman, Sovereign Bank New England; Co-Founder, John LaWare Leadership Forum  
**Georgianna Melendez**, Co-Director, Commonwealth Compact



## 20th Century Jobs & Economic Strategies

**Barry Bluestone**, Founding Director, Dukakis Center for Urban and Regional Policy, Northeastern University  
**Glynn Lloyd**, Founder and CEO, City Fresh Foods



## World Class Human Resources

### EDUCATIONAL EXCELLENCE

**Grace Fey**, President, Grace Fey Advisors, former Chair, UMass Board of Trustees  
**Rev. Gregory Groover**, Pastor, Charles Street A.M.E. Church, Chair, Boston School Committee



### AN EDUCATED, SKILLED WORKFORCE

**Rodney Dailey**, Workforce Development Manager, StreetSafe Boston  
**Nancy Snyder**, President and CEO, Commonwealth Corporation



### HEALTH AND FITNESS

**Ranch Kimball**, former President and CEO, Joslin Diabetes Center; Co-Chair, Healthy People/Healthy Economy Coalition  
**Toni Wiley**, Executive Director, Sportsmen's Tennis Club



## 21st Century Infrastructure & Sustainability

**Tina Brooks**, Undersecretary, Executive Office of Housing and Economic Development, Commonwealth of MA  
**Kirk Sykes**, President & Managing Director, Urban Strategy America Fund, a New Boston Real Estate Fund



# Facing Our Common Future

**W**ith the Boston Foundation approaching its **100th Anniversary in 2015**, we were inspired to imagine what our community will be like five years from now—and to base this year’s Annual Report on **a series of conversations about the progress we would like to see in our city and region**. We wanted these discussions to be broad in scope, yet rooted in personal experience—and so we called on a diverse group of people from many different backgrounds and several generations.

We invited high school and college students to talk about the issues that are most important to them. We engaged adults in a series of dialogues about the areas of community life they understand most—informed by their lives and their life’s work.

To frame these dialogues, we turned to **Greater Boston’s Emerging Civic Agenda**, which first was presented to the community by the Boston Indicators Project in 2004. The Civic Agenda’s goals and milestones were developed by hundreds of stakeholders and experts and have held up remarkably well over the last six years. They have had a profound effect on many organizations, including the Boston Foundation—informing and shaping everything from our grantmaking to our civic leadership.

We hope this annual report **inspires you to engage in your own conversations** with family, friends and colleagues as we are venturing forth together through these tumultuous times—**and facing our common future**.

## Voices of Boston's Youth

When facing our common future, no opinions are more important than those of our city's youth. And so we asked several community-based youth organizations to identify a diverse group of high school and college students to participate in a discussion. They had a lot of good things to say about Boston, especially the quality of our colleges and universities, but when asked about improvements they would like to see in the next five years, the immediate response was "Boston's schools," which took up most of the conversation. Because the discussion took place shortly after the fatal shooting of four people in Mattapan, including two-year-old Amani Smith, another major topic was violence. Here are brief excerpts from our conversation (see the entire transcript at [www.tbf.org](http://www.tbf.org)):

*Thanks to those who helped us identify youth for this conversation: Bob Giannino-Racine and Carolyn Spivak at ACCESS; Greg Johnson at Bottom Line; Claudio Martinez, Yi-Chin Chen and Katie Kelly-Hankin at Hyde Square Task Force; and Prof. Peter Kiang at UMass Boston.*

**Nnennaya Igwe**, a sophomore at Simmons College, doesn't hesitate when asked what she likes about Boston. "What don't I like about Boston?" she responds.



"Boston is so education-oriented, and there are so many opportunities. I applied for 20 scholarships my senior year and I got 14 of them!" Despite her positive attitude, she says: "My issue with Boston is the quality of the teaching. We have fifth graders reading at a third-grade level. We're sending people out into the world who are going to be working for us—and if they don't have the skills, what will happen?" She calls the lack of arts education in many schools "heartbreaking." "Granted, I'm a science major, but I think the arts are so important. They tap into your potential." And she sees the interrelatedness of all of the issues discussed by the youth. "I have a lot of friends who have passed due to violence," she says. "I feel that if we work really hard to improve our schools and we

bring in more mentors who have finished college to talk to kids, they will learn that you don't have to sell drugs. You don't have to be in a gang."

**Tom Nguyen**, a student at UMass Boston who also works full time, loves the diversity of Boston. "There are so many different cultures and people you can learn from and they all intermingle," he says. But while most of the youth know what careers they would like to pursue, he only knows that he will have to make enough money to support his parents, Vietnamese immigrants who came here 20 years ago. "When I think about picking a career, it's money-driven because I come from a poor family, so I not only have to take care of myself, but I feel like I have to take care of my family too. We have a lot of immigrants who come here and they have to work two jobs and they don't understand how the schools work. I would have loved to go to a charter school, but we didn't know about them. The schools should reach out to parents and students more."



*A conversation at the Boston Foundation*





**Roxanne Taylor** is proud of her Jamaican heritage and excited to be in her first year at Suffolk University, with plans to be a lawyer or doctor. “I like the opportunities Boston offers to us,” she says, “reaching out with scholarships and grants.” Having graduated from an exam school, however, she is concerned that not all students have a high quality education. “Too many students who aren’t from exam schools come into college without knowing what they need to know. I took AP (Advanced Preparation) classes, but if I hadn’t I would have been left behind too. I know a lot of kids who are taking remedial classes in college—which means that they’re stuck in one place—so how are they supposed to succeed? And too many kids don’t see a lot of positive things around them—all they see is crime and violence.” Not one to blame others for fixing the problems she sees, she adds: “I say if we don’t like it, we should be the ones to change it.”

**Samantha Brea** is a senior at Snowden International High School and plans to pursue a Masters in Social Work. She benefited from a mentor she met through Hyde Square Task Force. “She sees herself in me and I see myself in her,” she explains. “It’s so important to have people who understand you, because they know the struggles you’re facing and they care.” She has participated in what she calls “raising awareness” about violence. “About two years ago, there was a lot of violence going on in Jamaica Plain. At Hyde Square Task Force, we organized and we painted peace doves around the community. Little things like that can make people realize what a problem this is. Kids our age



should be the ones worrying about this because we’re losing friends and family members. We have to show that we’re bigger than this and we have to spread peace.”

**Waldy Nova**, a senior at West Roxbury Parkway Academy of Technology and Health, loves to talk about issues facing youth and plans to work toward a PhD in Psychology. “I love the sense of community activism in Boston,” he says.



“Whatever the neighborhood, you can find grassroots organizing and collaborating.” Aware that the Boston teachers’ contract is in negotiations, he says, “I think that the people involved in the conversation should be the ones who are most affected—and those are the students.” And while he agrees that parents should be involved in education, he cautions that some parents simply cannot be. “I was raised by a single mother, and she had to work crazy hours my whole life in order to keep a roof over our heads,” he explains. “She had to trust in me and my school to do the right thing.” The other youth agree when he says that all of the issues they are discussing are connected. “This conversation reminds me that segregation still exists,” he says, “not racial, but class segregation.” The others also

agree when he says that colleges and high schools should create more partnerships. “If we have a system that’s working and a system that’s failing, why not run the public schools more like colleges?”

**Jessica Sandell**, a senior at John D. O’Bryant High School, agrees that public education is Boston’s biggest problem. “You can’t get a job that pays enough to sustain yourself with a high school diploma,” she says. “You have to go to college—but not all students are being prepared to succeed in college.” Even though she goes to one of Boston’s three exam schools, she still sees room for improvement. “We have a brand new lab,” she says, “but my English class doesn’t have enough books for the whole class, and we’re assigned homework for those books. The teacher tells us to share books after school, but I work after school. Also, there



are a lot of teachers who just don’t care. I had one teacher who was late every single day. I feel the principal should reach out more to students and be more aware. I understand that it’s hard to fire teachers, but you can have a teaching degree and not be very

good with students.” She also thinks schools should do more to let students know about community-based programs. “I had to find out about Bottom Line on my own,” she says, referring to a program that helps with the transition to college. “Nobody told me it was available to me.”

**Fabrice Montissol** is a soft-spoken young man who came to Boston from Haiti when he was six. Today, he is a senior at Brook Farm Academy, and likes the fact that Boston

has so many great colleges, but doesn’t think that high schools prepare students for college. “Last year, my guidance counselor told me that one out of every three students who graduate from the Boston Public Schools actually graduate from college. That’s a real problem—and not just here; it’s a crisis in America.” When it comes to violence, he thinks the biggest barrier to solving the problem is the silence of the community. “As long as we’re quiet, it’s still going to happen,” he says. “You can’t



put a cop on every block in Boston. As a community, we need to stop being so quiet and so passive, in my opinion. We have to come together.”



## Some Goals for 2015

### Improve the Boston Public Schools

Especially the quality of the teaching

### Give Students a Voice

Seek their ideas about the teachers’ contract and other issues

### Encourage Mentoring

By bringing college graduates in to help high school students

### Offer Arts and Physical Education

Restore these important activities in schools

### Improve Access to Outside Programs

Inform students about opportunities available to them

### Create More Partnerships

Especially between high schools and colleges

### Get Kids Off the Street

By keeping them occupied with programs and jobs

### Speak Up

Stop being quiet about violence

### Take Personal Responsibility

For the change you want to see

# An Open, Dynamic Civic Culture



**Georgianna Melendez** grew up in Boston and loves it here. And so her job, as Co-Director of the Commonwealth Compact, comes naturally to her. The Compact was created in 2008 to help our state's employers embrace diversity in their hiring practices. Ms. Melendez believes that while things are improving, there are still challenges. "In businesses and even some large nonprofits, diversity of gender, race and ethnicity is strong at the entry level and decent at the management level, but it tapers off at the top, among executives and boards," she explains. "We want the full range of our diversity to be reflected at the highest levels." Asked if Boston still "lacks the collaboration gene," as national columnist Neal Peirce suggested in 2004, she responds: "I think there is progress within silos—nonprofits collaborating with each other and hospitals working together—but collaborations and conversations across those silos are still a real challenge for us. That gives us something to work toward over the next five years."

**John Hamill**, former Chairman of Sovereign Bank New England, first came to Boston 30 years ago when the city—and the city's leadership—was far less diverse than it is today. Five years ago, he co-founded the John LaWare Leadership Forum, which convenes business and civic leaders to address the challenges and opportunities

*Georgianna Melendez and John Hamill  
speaking at the Boston Foundation*

facing our city and region. "I think we are only going to be a dynamic and inclusive civic culture if we're able to bring together all of the parts of our community," he says, "and not just by different professions and backgrounds but also by gender, race and ethnic diversity. It's not only the right thing to do; it's the smart thing to do. Today we're not just competing with other cities in our own country but with cities and regions all over the world. We need the strength of many diverse groups coming together to be on the cutting edge."

●

## Some Goals for 2015

### City of Collaboration

Trumpet the collaborations that we do have while collaborating more across sectors

### Room at the Top

Reflect our city's diversity at the highest organizational levels

### Summer of Opportunity

Use the Urban League's 2011 national convention in Boston to help change the city's image for people of color

### If You Are Young

Move out of your comfort zone and seek out people with different backgrounds

### Technology Changes the World

Take advantage of social media and other technologies to strengthen our civic culture



# Civic Culture and the Boston Foundation



Over the last decade, the Boston Foundation has transformed itself from a behind-the-scenes philanthropic institution focused solely on grantmaking to one that plays a central role in building an open, dynamic civic culture in Greater Boston. In its position as a neutral convener, the Foundation brings

thousands of people together every year through its *Understanding Boston* series to discuss topics of greatest interest to our community—this year focusing on issues ranging from the ingredients of charter school success to municipal budgets to Boston’s response to the devastating earthquake in Haiti.

## Creating National Models of Civic Leadership

With the support of a special **Civic Leadership Fund**, contributed to by hundreds of community-minded people, the Boston Foundation’s model includes research, public forums and convenings, strategic grantmaking, the formation of task forces and coalitions, strategic communications—and nonpartisan public policy work. This work has led to major legislative victories in education reform, CORI reform, cultural facilities funding and other areas crucial to our community’s well-being and success.

All of this work is informed and supported by the **Boston Indicators Project**, which has convened hundreds of people to identify the issues that are central to Boston’s future. It also tracks progress in 10 sectors of community life. In addition, the Foundation convenes the **John LaWare Leadership Forum**, a group of business

and civic leaders who gather regularly to explore the ways that Boston and the region can maintain and expand its competitiveness in the increasingly global economy.

## Connecting with Boston’s Neighborhoods

For the last year, the Boston Foundation has been strengthening its relationship with, and understanding of, Boston’s neighborhoods and the people who live in them through a program called **Community Connections**. Through informal sessions and roundtable discussions in the community, this program explores the issues that are of greatest importance to the people who live and work in Boston’s many diverse neighborhoods—from Chinatown to Mattapan to a series of briefings at neighborhood associations in the South End and on Beacon Hill.

## Making Diversity Work

The Boston Foundation was one of the original signers of the **Commonwealth Compact**, an initiative designed to establish Massachusetts as a uniquely inclusive, honest and supportive community of—and for—diverse people. The Boston Foundation participated in the earliest discussions about the Compact—both as a leader and a funder—providing early capacity building support and working with a task force to develop a web presence for the Compact. The Foundation was also there at the beginning for **The Partnership**, a nonprofit organization that is building bridges that connect the important work of diversity with today’s very real need for talent.



*Glynn Lloyd and  
Barry Bluestone  
at the Boston Foundation*



# 21st Century Jobs & Economic Strategies

**Glynn Lloyd**, founder of a Roxbury catering company called City Fresh Foods, effortlessly makes the transition from running his business to discussing the broad issue of jobs and economic development. His business was created with an eye to employing local people and helping to develop the community. While he is concerned about the fact that our educational system is graduating students without some of the basic skills he needs as an employer, he delights in finding “natural leaders” among his staff of 65 or so workers, especially if they are immigrants or young people from the neighborhood. “There are many examples where we’ve taken someone who doesn’t even have basic knowledge or the skills we need and educated them and trained them,” he says. “It’s value back to the company and to the community.”

He also sees his business, which recently expanded to a new facility, as operating in a field that is poised on the edge of what he calls the “limits of ecology”— a food system that is showing signs of fragility because of its reliance on expensive forms of energy. “We are seeing a rise of farmers’ markets because people are beginning to distrust the food system that

we have in this country,” he explains. “That creates opportunities for businesses like ours that are locally-grown and focused.”

**Barry Bluestone** has been a fan of manufacturing since his first job working in a Ford plant in Detroit. Two years ago, as Director of the Dukakis Center for Urban and Regional Policy at Northeastern University, he authored a report for the Boston Foundation which showed that, despite widespread rumors of its demise, manufacturing is alive and well in Massachusetts. “You have some old line manufacturers doing quite well in old fields, like leather goods,” he explains. “And then you have others streamlining their systems and making sophisticated medical devices.” In fact, he says that manufacturing in the state has added more than 4,000 new jobs since January of 2010 alone.

“Because manufacturing offers good paying jobs,” he says, “and because thousands of workers will retire in the coming decades, we need to place more emphasis on vocational high schools and community colleges that can prepare workers for entry-level and middle-level jobs.” This is a point of agreement with Glynn Lloyd. The two men also agree on the tremendous potential

of clean energy as a key ingredient in the recipe for our economic future.

## Some Goals for 2015

### Think Locally

Offer incentives for starting businesses where workers actually live

### Link Regionally

Encourage businesses to purchase their supplies and services close to home

### Train for the Jobs of the Future

Strengthen vocational education and community colleges

### Foster Entrepreneurship

Find the formula for developing entrepreneurial skills

### Zone for Manufacturing

Revive inner-city parcels for growth industries

### Focus on Clean Energy

Position our community to lead the way in developing alternative energy sources

# Jobs, Economic Strategies and the Boston Foundation

**T**he Boston Foundation takes a broad and comprehensive approach to supporting economic strategies that have within them the power to create jobs and drive our city and region forward. From encouraging small businesses and entrepreneurship to convening the John LaWare Leadership Forum, which engages business and civic leaders in discussions about competitiveness, the Foundation is approaching this important area through its grantmaking and civic leadership.

## Encouraging Small Businesses

This year, the Boston Foundation made a major operating grant to a program that had a profound impact on Glynn Lloyd, the founder of City Fresh Foods (see page 23). The nonprofit organization **Interise** stimulates economic revitalization in low-income urban communities across the United States by providing small business owners with the education and connections they need to grow. “The Streetwise MBA program at Interise took me ‘out of the woods’ and allowed me to spend quality time looking at the bigger picture,” says Mr. Lloyd.

## Fostering Growth in the Life Sciences

The Boston Foundation co-founded and has funded the efforts of the **Massachusetts Life Sciences Collaborative** to foster growth in the state and to advance a clear understanding of the economic conditions that affect the life sciences arena as a whole. The Collaborative brings together life sciences leaders in academia, industry and government—including the Commonwealth’s world-class universities, teaching hospitals and research institutions, as well as biotechnology and the numerous other companies that contribute to the expansion of this vital area.

## Helping to Spark Boston’s Climate Revolution

As a lead partner in Mayor Thomas M. Menino’s **Renew Boston** campaign, the Boston Foundation made a major grant



to support the City’s **Climate Action Leadership Committee**. “Boston is in a strong position to further decrease our carbon footprint and create more jobs for our residents in the green economy,” says Mayor Menino. Renew Boston is connecting residents and businesses with energy efficiency resources and engaging all of the stakeholders—from government to businesses to institutions to neighborhoods groups—in its efforts to adapt to climate change in a way that benefits all of the residents of the city.

## Initiative for a New Economy

The Boston Foundation is one of the major supporters of this nonprofit organization that is dedicated to creating profitable business relationships between Massachusetts-based minority businesses and large institutional purchasers. The ultimate goal is to change the face of the economic landscape to one that is more inclusive, with minority business enterprises becoming fully integrated into the mainstream economy—in the process strengthening the fabric of our communities, sending a message of economic inclusion and invigorating the overall economy of our state.



*The Massachusetts Life Sciences Collaborative promotes the work of companies like Wolfe Laboratories, a successful pharmaceutical development company located in Watertown, Massachusetts.*

*Grace Fey and Rev. Gregory Groover  
at the Boston Foundation*



# World Class Human Resources: Educational Excellence

**Rev. Gregory Groover** “The stars are aligned as never before when it comes to public education,” says Rev. Gregory Groover, Chair of the Boston School Committee, a full-time job on top of his other full-time job as pastor of the Historic Charles Street A.M.E. Church in Roxbury. He is referring to a confluence of recent achievements, including passage of statewide education reform, \$250 million in federal Race to the Top funding and the leadership of Boston Public Schools Superintendent Carol R. Johnson, who Rev. Groover says is “holding folks accountable like never before.”

“If there is a city that has the wherewithal and the resources to turn a school district around and make it a premier district, it’s Boston,” he says. “And so that’s what keeps me excited. It’s also exciting to hear the term ‘pipeline’ being used, because we must see Pre-K through college as a continuum. We must get the message into every neighborhood that you cannot stop at high school, because increasing the number of college-educated residents will increase the quality of life for everyone.”

Rev. Groover also thinks that everyone in the community should take a greater responsibility for public education. “I think downtown can play a larger role,” he suggests. “Many corporations have stepped up, but many more can. And I would love to see corporations adopt a school and caring individuals step up and mentor students.”

**Grace Fey** proudly describes herself as “a product of public higher education,” having graduated from the University of Maryland. As a result, she has made public higher education a top priority, serving as Chair of the University of Massachusetts and as a member of the Board of Higher Education. One of the first things she and Rev. Groover agreed about when they sat down to talk was the importance of seeing education in terms of a “pipeline” stretching from Pre-K through college.

She is a strong supporter of “Success Boston,” a public/private partnership focused on helping graduates of the Boston Public Schools succeed in higher education. “There have to be support systems for the young people we’re sending to college,” she explains. “Many times, they are the first in their families to go beyond high school and so it can be intimidating for them. That makes it crucial for high school guidance counselors and staff at community colleges and state colleges to work together on behalf of these students. And we have to be sure that those who grow up in Boston are equipped for the jobs of the future because they’re the ones who will stay and build their lives here. Increasing the number of college-educated residents will increase the quality of all of our lives.”

## Some Goals for 2015

### Strengthen the Pipeline

Support a seamless pipeline that stretches from Pre-K through college

### Extend the School Day

And use the extra hours to extend learning

### One Caring Corporation or Adult

Encourage corporations to adopt a school and adults to mentor youth

### Raise Third-Grade Reading Scores

Improving the odds of future academic success

### All Children Go to College

Get the message out to every neighborhood that education continues through college

### Educate for the Jobs of the Future

Determine where the jobs will be and give students the education they will need to fill them

# Educational Excellence and the Boston Foundation

**T**his year, the Boston Foundation broke new ground in its efforts to support and improve education at all levels in Massachusetts. The year began with the Governor signing a sweeping education reform bill that is helping to level the playing field for thousands of children of color and immigrants struggling in the Commonwealth's schools. The legislation was supported by a broad coalition of community leaders convened by the Boston Foundation.

## Addressing the Achievement Gap

On January 18th, Governor Deval Patrick signed "An Act Relevant to the Achievement Gap," legislation that was supported by the **Race to the Top Coalition**, convened by the Foundation both to advance



*Boston After School and Beyond runs a popular program on Thompson Island to prevent summer learning loss.*

reform and position the Commonwealth's application for federal Race to the Top funding. In August, Massachusetts placed first among the states awarded the funding—bringing the state \$250 million in new resources that will have a powerful impact on more than 685,000 low-income students in 1,375 schools and allows for at least four in-district charter schools in Boston and 10 others statewide.

## Collaborating on a Comprehensive Pipeline

In June of 2010, a historic partnership among the Boston Foundation and other local charities and funders launched the **Boston Opportunity Agenda**—designed to make Boston the premier city of upward mobility where everyone can achieve greater opportunity. It represented the first time in U.S. history that an American city has committed significant resources—an initial \$27 million—to support a pipeline that spans the full range of services from early childhood care and education through post-secondary achievement.

## Extending Learning Time

A major *Understanding Boston* report released this year showed that time is a critical factor in improved performance by students in Boston's charter schools—where students, on average, receive the equivalent of at least 62 more full-school days annually than their peers in traditional schools. The Foundation also made major grants this year to **Massachusetts 2020**, which promotes extended learning time throughout the state, and **Boston After School and Beyond**, which conducted a summer learning project for Boston students.

## Encouraging College Completion

**Success Boston**, a partnership between the Boston Foundation, the City of Boston, the Boston Public Schools and others saw real progress this year, with 96 percent of students engaged by the initiative staying in college. The Foundation also supported a number of nonprofits focusing on college completion, including the award-winning **Posse Foundation**, which opens higher education to thousands of students overlooked by the college applications process.



*Visitors to Posse Boston are welcomed by a chalkboard wall with the Posse Foundation logo, where Posse Boston Scholars gather. These young leaders are attending Bryn Mawr College, Hamilton College, and Union College, three of Posse Boston's six college and university partners.*



## World Class Human Resources: An Educated, Skilled Workforce

**Rodney Dailey** “Jobs: A Way Out. A Way Up.” This is the message that Rodney Dailey promotes among youth in the most violence-afflicted and economically disadvantaged neighborhoods in Boston. As Workforce Development Manager for StreetSafe Boston, a youth violence prevention initiative of the Boston Foundation, he is working with the same population he’s focused on for years, first as the founder of the organization Gang Peace in the 1990s, and more recently as a job placement specialist for the Suffolk County Sheriff’s Department. “This is a population that needs to have a deliberate pathway to the workforce,” he says. “This is also a population that has a strong entrepreneurial spirit and some good technology skills. We need to tap into that and get them in a learning mode.” He leaves no stone unturned in his quest to find entry-level jobs with the potential for growth and looks for areas that have future potential. “Our housing stock in Greater Boston is very old and as more homeowners and businesses decide they need to weatherize those buildings, there is exciting potential for entry level, good paying jobs that are also good for the environment.”

**Nancy Snyder**, President of Commonwealth Corporation, an organization that works to strengthen what she calls “the intersection between education and jobs,” has seen workforce needs evolve over the last 20 years. “We’ve experienced a significant shift in our economy toward a very highly skilled workforce,” she says, “which means that the most important thing we can do is have a very strong Pre-K-12 education system, so that our students enter college prepared to succeed and graduate.” At the same time, she believes that we must create pathways that work for everyone. “We have the strongest four-

*Rodney Dailey and Nancy Snyder in  
dialogue at the Boston Foundation*

year college system in the nation,” she explains, “but we also need very strong technical schools, community colleges and apprenticeship programs for those who don’t follow traditional pathways. We are seeing growth in some interesting areas, like manufacturing and construction, and we need to do a better job of letting young people know about these jobs.”

She agrees with Rodney Dailey that one of the most exciting new areas for employment is the green economy. “Getting people certified in LEED and solar panel installation and other skills needed for ‘green’ jobs offer a promising path to work that doesn’t require a four-year degree,” she says. “And we simply must acknowledge the important role that immigration plays in our labor force, so that we can help people to assimilate quickly and join our workforce.”

## Some Goals for 2015

### Create Pathways to Employment

For young people in Boston’s inner city neighborhoods

### Connect Learning to the World of Work

And do it early on in the educational process

### Diversify Post-Secondary Opportunities

Strengthen associate degree and certificate programs

### See the Importance of Middle-Skill Jobs

And train people for them

### Reverse the Decline in Jobs for Teens

And offer jobs that prepare them for the future

### See “Green”

And the tremendous job opportunities that come with it

### Contextualize ESOL

Teach ESOL in the context of occupational skills



# Workforce Development and the Boston Foundation

To ensure that Boston's economy and residents are thriving, everyone must have access to education and training that leads to jobs with family-sustaining wages. The Boston Foundation invests in innovative and sustainable models of education and training that build our city's and region's capacity to prepare its workforce for jobs in a knowledge-based economy, with a focus on employer-led initiatives. The Foundation also invests in improving the quality of transitions and coordination among adult basic education, post-secondary education and the workforce system.

## Investing in Green Jobs

Through the **SkillWorks** initiative, the Boston Foundation brings together philanthropy, government, community organizations and employers to address the goal of helping low-income people attain family supporting jobs. Since 2003, SkillWorks has invested \$15 million to help more than 3,000 workers receive skills training—with

hundreds entering the workforce or receiving raises and promotions. With confidence that Massachusetts has the potential to be a major player in the Clean Energy Economy, SkillWorks created the Green Collar Career Pathways Initiative, supporting local groups to train workers in weatherization and other energy efficient skills.



PHOTO BY MICHAEL LIU, CHINESE PROGRESSIVE ASSOCIATION

## Creating Ladders of Opportunity

In 1994, the Boston Foundation made a grant to help found **STRIVE** and has been a strong supporter ever since. This nonprofit job-readiness program helps unemployed, hard-to-place individuals, including ex-offenders, find jobs and stay employed. In addition, the \$1.5 million **Allied Health Workforce Initiative** is partnering with Boston hospitals to invest in the development of current workers to address the critical shortage of allied health professionals. The Foundation also works with **Crittenton Women's Union** to help low-income women and their families attain economic independence and **Jewish Vocational Service** for its work in adult basic education, post-secondary education and the workforce.

## Immigrant Integration

Immigrants make up 27% of Boston's population and 31% of the city's workforce. English for Speakers of Other Languages (ESOL) classes not only benefit recent immigrants who have come to Boston seeking the American dream, but benefit our community by preparing these newcomers for the workplace. The Boston Foundation invests in increasing access to high-quality ESOL classes for adult immigrants through **English for New Bostonians**, a public/private community partnership first launched by the Mayor's Office of New Bostonians. This year a major grant went to that program and to **Commonwealth Corporation** for a progress report on ESOL in the state and another report about the ways that sector-based workforce programs are evaluated. Commonwealth Corporation's motto could describe all of the Foundation's efforts in workforce development: "A Common Mission. A Wealth of Possibilities."



*STRIVE helps unemployed, hard-to-place individuals find jobs and stay employed.*

*Ranch Kimball and Toni Wiley  
at the Boston Foundation*



# World Class Human Resources: Health and Fitness

**Toni Wiley** As a child, Toni Wiley lived near Sportsmen’s Tennis Club, which sits on the corner of Talbot and Blue Hill Avenues in Dorchester. “We grew up riding our bikes around the neighborhood and going to the playground,” she says. “We even walked to school. But today, parents drive their kids everywhere because the streets feel unsafe. Combine that with no physical education in many schools and the fact that too many schools farm out their cafeteria to fast food providers, and you have a recipe for a health disaster.”

Today, she is Executive Director of Sportsmen’s Tennis Club, which offers comprehensive tennis, academic and social programs for children ages four and up—as well as programs for adults. Increasingly, the club is serving public schools that have had to cut physical education because of budget constraints. “A number of principals have reached out to us to provide the physical education they can’t provide in their schools—and now we’re reaching out to them. But when physical education is cut from the schools, we have to recognize the true cost of those decisions,” she warns, “not only today, in quality of life, but in health care costs down the road.”

**Ranch Kimball** As the former CEO of Joslin Diabetes Center, Ranch Kimball has seen the devastating results of obesity caused by poor nutrition and lack of physical activity. “Diabetes is the ultimate long-term chronic disease,” he says, “and Type 2 diabetes is very preventable through exercise and weight control. But exercise is not a part of daily life for too many people and heavily processed fast foods are incredibly inexpensive and often the only thing available in many inner city neighborhoods. The old neighborhood grocery store is gone, replaced by a supermarket two miles away and a convenience store.

That means that too few people live in walking distance to fresh bananas, fresh chicken or turkey and fresh vegetables.”

He is co-chair of a new coalition, **Healthy People/Healthy Economy**, led by the Boston Foundation and the New England Healthcare Institute. It is based on the understanding that health care costs are crowding out investments in the real determinants of health—education, access to nutritious foods, safe communities and exercise. “When we move the needle on this, we will succeed in reducing the long-term growth of health care costs,” he explains, “and we will improve the daily quality of life in our communities.”



## Some Goals for 2015

### **Healthy People/Healthy Economy**

Make the link between chronic disease and out-of-control spending

### **Reduce Obesity Among Children and Adults**

Educate people about the link between obesity and chronic disease

### **Restore Physical Education in Schools**

Or help schools partner with outside programs to keep kids active

### **Introduce kids to every sport**

And they will find at least one they like

### **Teach Students About Nutrition**

And have them bring the information home to their parents

### **Encourage More Farmers’ Markets and Small Stores That Sell Produce**

Make more fresh fruits and vegetables available to neighborhoods

# Health and the Boston Foundation

**W**hile in the past, the Boston Foundation's health-related work primarily focused on access to health care, today evidence presented in reports the Foundation has published, in partnership with the New England Healthcare Institute, shows that investments in prevention and wellness have the highest payoff, both in terms of health outcomes and reducing health care costs. Today, most of the Foundation's focus is on encouraging healthy behaviors among Boston residents and increasing access to healthy food and opportunities for physical activity.

## Healthy People/Healthy Economy

In partnership with the New England Healthcare Institute (NEHI), the



Foundation is working to reframe the conversation about health from a focus on access to prevention and wellness and the impact on cost and economic competitiveness. Building on the Foundation's report *The Boston Paradox: Lots of Health Care, Not Enough Health*, published with NEHI, the Foundation has launched a coalition that is setting targeted strategies to address rising rates of obesity, chronic preventable disease, and health care costs. The goal is to make Massachusetts the national leader in health and wellness.

## Encouraging Physical Activity

The goal of **CHAMPS Boston**, an ambitious youth development initiative launched by the Boston Foundation in the fall of 2010, is to ensure that every child in Boston has access to high quality athletic

opportunities and that all coaches for youth sports are of the highest quality and understand the basics of youth development and health. In its first phase, the initiative already has trained 600 coaches. In addition, the initiative is focused on access to good equipment and well-maintained facilities.

This year, the Foundation made major grants to organizations that encourage physical activity among youth. One grantee was Dorchester's **Sportsmen's Tennis Club**, which is providing sports training to people of all ages and, in some cases, providing the only physical education available to students in Boston's schools. Another major grant went to a national nonprofit organization, called **Playworks**, to expand its model within Boston. Playworks promotes safe, healthy and inclusive play and physical activity to schools at recess and throughout the entire school day.

## Promoting Access to Healthy Food

This year, the Foundation offered major support to two community-based programs dedicated to improving access to fresh produce and other healthy food choices for residents of Boston's neighborhoods. Victory Programs' **Revision Urban Farm** in Dorchester grows fresh fruits and vegetables for area residents, while contributing to the "Greening of Blue Hill Avenue." The Bowdoin Street Health Center's **Healthy Food Access Project** is linking community farmers' markets with corner stores, restaurants and residents in the Bowdoin/Geneva neighborhood of Dorchester. It also works with consumers and young people to help local stores revamp their merchandising in order to make the sale of fresh produce and other healthy foods a good business proposition.



*Sportsmen's Tennis Club is working with a number of Boston's public schools to provide physical activities for students.*

# 21st Century Infrastructure and Sustainability

**Tina Brooks** For Tina Brooks, thinking about infrastructure and sustainability leads directly to considering the kinds of communities we live in and how we experience them. As the Commonwealth's housing policy chief, she is a key architect in expanding affordable housing across the state—and one of the first things she speaks about is smart growth housing. "You start with an amenity that everyone wants to be close to," she says, "whether it's transportation or a magnificent park system, and then you build around that. A great example is the Carruth complex in Dorchester, which has revitalized a neighborhood around a new T station." She quickly makes the point that sustainability isn't just about real estate. "You can't sustain a community if a high percentage of the residents can't find employment," she explains. "So people have to be the center of any planning you do."

For her, the development of new housing is also a multidisciplinary effort. "It's the only way to come up with smart solutions," she explains. "And it's also critical to think regionally. We need the entire region to be healthy if we are going to be stable over the long term." She would like the opportunity to educate people about zoning for density.

"People have to realize that 'density' isn't a dirty word," she explains. "If the public sector could play a larger role in helping to assemble parcels and work with communities to put smart zoning in place, developers like Kirk can come along and make wonderful things happen."

**Kirk Sykes** As President of the Urban Strategy America Fund, a New Boston Real Estate Fund, Kirk Sykes is a seasoned leader with 25 years of experience in community-centered development. He was a major developer of Olmsted Green, on the site of the old Boston State Hospital, and currently is working on Parcel 24, adjacent to the Greenway. "Urbanization is key to our future," he says, "with more people living closer together, transit nodes right underneath them that can take them to any place in the city—and very smart green spaces."

Central to his vision is the goal of reducing our carbon footprint. "In the next five years, I hope we can reduce our carbon footprint by 20 percent. Force cabs to be green and make it too expensive to drive into the city. It would take real commitment and behavioral change, but it is doable. If they can do it in Delhi and Mumbai, we can do

it in Boston." He considers the Greenway a wonderful "living room" for the city. "If we can get to a point where we can increase the housing density in and around downtown and put some feet on the street," he adds, "that living room will be much more dynamic."

## Some Goals for 2015

### Reduce Boston's Carbon Footprint by 20 Percent

With green cabs and disincentives for driving into the city

### Expand Smart Growth Housing

Near transit nodes, green spaces and other amenities

### Retrofit Old Buildings for Energy Efficiency

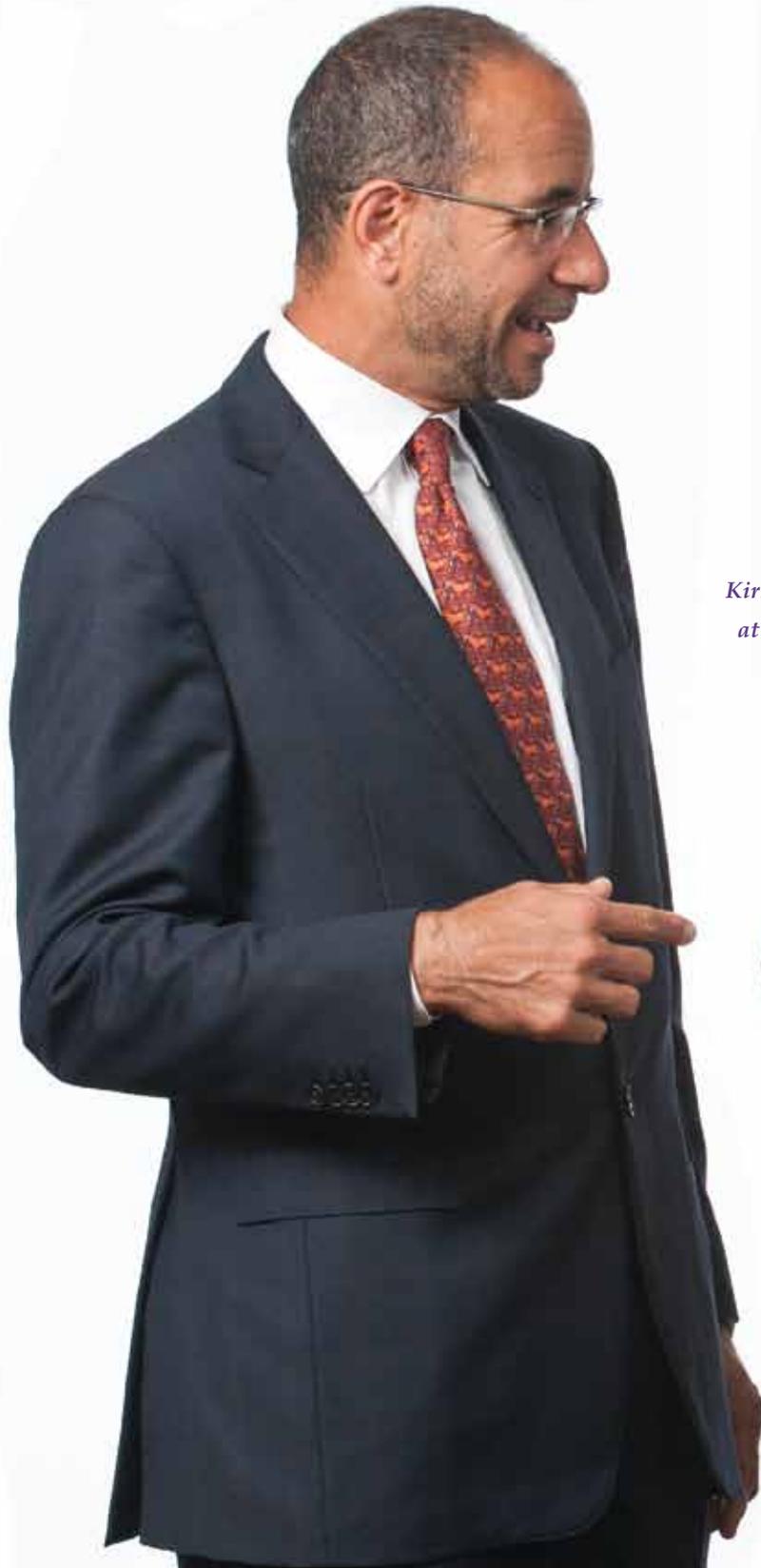
And make housing affordable in the process

### Think Regionally

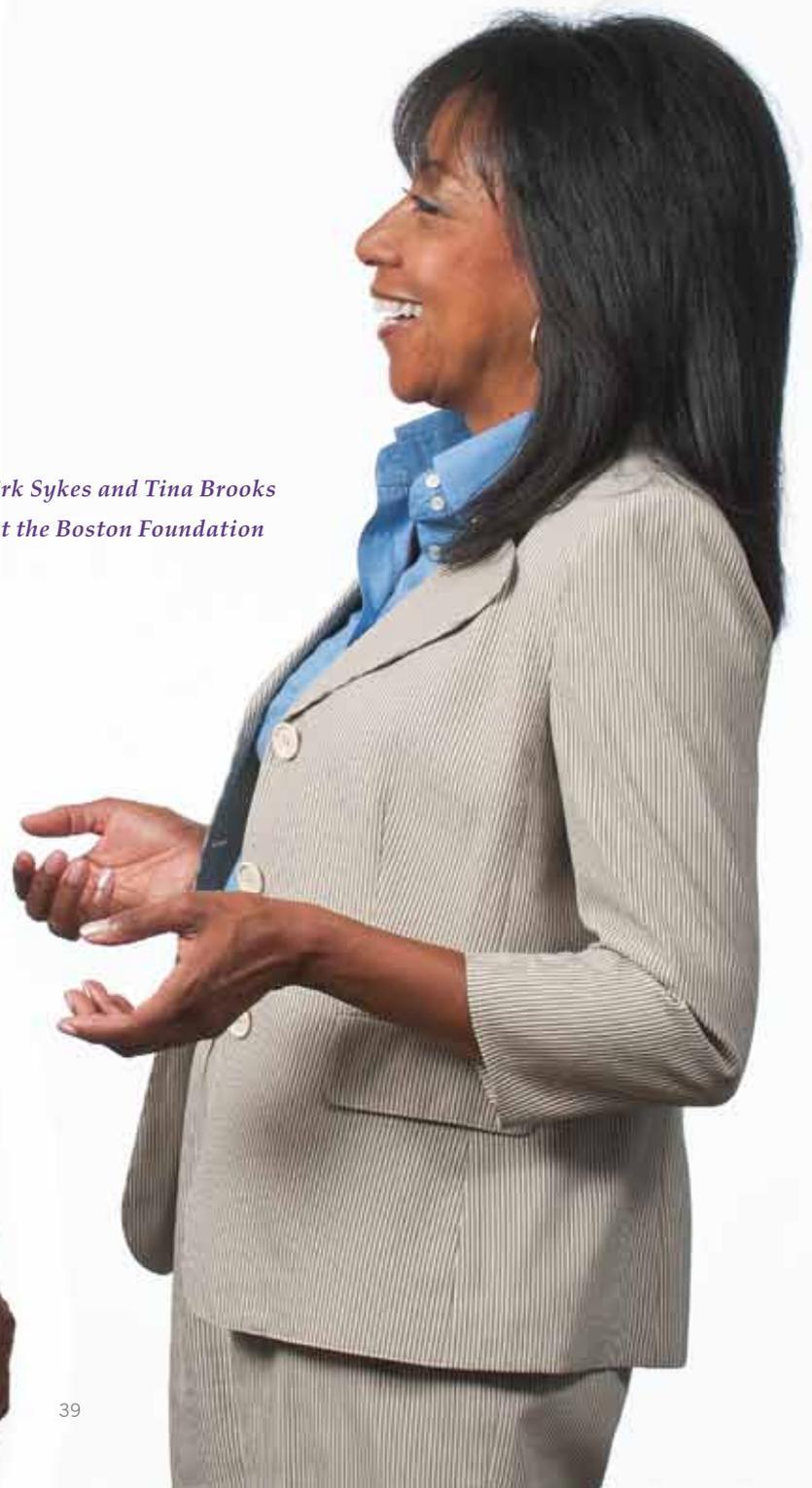
And realize that long-term stability relies on it

### Consider the Human Factor

Communities can only thrive if the people in them can sustain themselves and their families



*Kirk Sykes and Tina Brooks  
at the Boston Foundation*



*A new commuter rail station in the Four Corners section of Dorchester is just one of the new stations along the Fairmount/Indigo Line.*



# Infrastructure & Sustainability and the Boston Foundation

**F**or the Boston Foundation, infrastructure is not just about housing, transportation and a clean environment; it's about people. Housing is a stabilizing force in the lives of families and communities—and locating affordable housing near transportation makes it possible for people to travel to their jobs, recreational opportunities and resources that are central to leading full and meaningful lives.

## Supporting Urban Villages

The Boston Foundation has been a key partner in the **Fairmount/Indigo Line CDC Collaborative**, a group of community development corporations and neighborhood-based organizations that are in the midst of creating dynamic, diverse neighborhood centers in Dorchester, Mattapan and Hyde Park. All of these new “urban villages” have one thing in common: they are near planned stations on the Fairmount/Indigo Line, an underutilized commuter rail line which is being transformed into a rapid-transit like service that will link people in these neighborhoods to the rest of the city and its resources. One urban village that has been

completed is Dudley Village, which offers 50 units of affordable rental housing and more than 6,000 square feet of commercial space located in the Dudley Street neighborhood.

## Focusing Civic Leadership on the Housing Crisis

The Boston Foundation convened the **Commonwealth Housing Task Force** in 2002 as a coalition of business leaders, housing advocates and other civic leaders committed to addressing the housing crisis in the state. The Task Force played a major role in the passage of significant smart growth housing legislation, including Chapter 40R and Chapter 40S, which has led to 11,254 housing units in 32 smart growth zoned districts across Massachusetts.



## Stabilizing Neighborhoods by Leveraging Financial Resources

The Foundation also has made close to \$1 million in grants toward building the assets of families in Boston's neighborhoods—and has leveraged its resources by making Program-Related Investments (PRIs), which are loans and equity investments provided at below-market rates to support development projects. These investments include \$6.5 million in PRI loans for housing, neighborhood stabilization and energy retrofits. Made in partnership with other funders, these resources have helped to finance more than 2,500 units of housing and leveraged hundreds of millions of dollars in additional financing. This year, the Foundation made a PRI in the **Neighborhood Stabilization Loan Fund**, which addresses foreclosure problems in distressed urban areas across the state. Managed by the Massachusetts Housing Investment Corporation, the Fund combines \$17 million in private capital with \$5 million in philanthropic and governmental resources to rehabilitate neighborhoods.

*Dudley Village*

# Thriving People. Vibrant Places.



## Selected Grants from Discretionary Funds from 2010

This was the first full year of grantmaking under the Boston Foundation's newly articulated goals and objectives that place a strategic focus on the people and places of Greater Boston. These grants reflect the Foundation's shift to unrestricted support in the form of general operating support grants and large, multi-year investments. A total of \$12.4 million in grants was made under this competitive process. Many of these grants are from the Permanent Fund for Boston, which is the Foundation's largest unrestricted fund and has been built by hundreds of civic-minded Bostonians over the years. Here are just some of the grants made during 2010.

Goal: **Greater Boston residents are successful and thriving**

Objective: **Improve outcomes for Boston's residents across the education pipeline**

Strategic Focus: **Accelerate structural reform and promote innovation in public schools in Boston**

### **Massachusetts 2020, \$300,000**

*\$200,000 from the Permanent Fund for Boston, \$50,000 from the Theodore C. Hollander Trust Fund and \$50,000 from the Frank B. & Watson G. Cutter Fund—payable over three years in three equal installments*

For general operating support for its efforts to promote extended learning time, particularly in the Boston Public Schools

**Thomas B. Fordham Institute, \$15,000**

*From the Innovative Schools Fund*

For the Boston aspects of a research study on the prospects for educational entrepreneurship in America's 25 largest cities

**Stand for Children, \$30,000**

*From the Permanent Fund for Boston*

To support an educator organizing project in Boston

Strategic Focus: **Increase the 2- and 4-year college graduation rate for low-income, minority, and first-generation college students from public schools in Boston**

**ACCESS, \$200,000**

*From the Permanent Fund for Boston*

For financial aid advising, coordination of Success Boston coaches, management of the student tracking database, and its continued expansion of the High School Advising Program

**The Bottom Line, \$150,000**

*From the Permanent Fund for Boston*

For expansion of its College Success Program to serve 1,400 high school seniors and to support implementation of its strategic plan.

**Freedom House, Inc., \$125,000**

*From the Permanent Fund for Boston*

For operating support to implement the organization's strategic plan and expansion of its PUSH college transition support program



**Hyde Square Task Force, \$154,000**

*From the Permanent Fund for Boston*

To provide transition support for students from the classes of 2009 and 2010 and a six-week intensive summer academy

Strategic Focus: **Promote the career advancement and economic security of low-income individuals**

**English for New Bostonians, \$150,000**

*From the Polaroid Fund*

For general support of English for New Bostonians, a public/private/community partnership which provides grants and technical assistance to programs that offer ESOL programs in the City of Boston

**Jewish Vocational Service, Inc., \$300,000**

*\$165,000 from the Permanent Fund for Boston, \$85,000 from the Herbert & Lucy Field Fund and \$50,000 from the Polaroid Fund—payable over three years in three equal installments*

For the Transitions to College and Careers program, which seeks to help students who have graduated from Adult Basic Education and English for Speakers of Other



Languages programs develop the required skills to test into and succeed in a post-secondary educational environment

**Massachusetts Coalition for Adult Education, \$110,000**

*From the Polaroid Fund—payable over two years in two equal installments*

For support of the Adult Basic Education Public Policy Project, a statewide advocacy initiative designed to increase the visibility, public funding and system capacity for adult basic education

Objective: **Increase the health and wellness of Greater Boston residents**

Strategic Focus: **Encourage healthy behaviors among Boston residents and increase access to healthy food and opportunities for physical activity**

**Bowdoin Street Health Center, \$270,000**

*From the Permanent Fund for Boston, payable over three years in three equal installments*

For support of the Healthy Food Access Project, which will foster a Farmer's Market, support bodega and corner store merchants in offering healthy food choices, and encourage healthy purchasing patterns through consumer education

**Greater Boston Food Bank, Inc., \$150,000**

*\$65,000 from the Permanent Fund for Boston, \$50,000 from the Harcourt Family Foundation, and \$35,000 from the Arthur L. Sherin and Frances C. Sherin Fund*

For the Increasing Access to Healthy Food for Children in Need program, which seeks to provide well-balanced, nutritious meals and educational activities through the Kids Café program

**Playworks, \$225,000**

*From the Permanent Fund for Boston, payable over three years in three equal installments*

To provide general operating support for its Metro-Boston expansion, which will enable the agency to nearly double the number of schools it serves and increase the number of students engaging in daily physical activity through the Playworks model to more than 10,000 participants

Goal: **Greater Boston neighborhoods and communities are vibrant, safe and affordable**

Objective: **Increase the livability, affordability and safety of Greater Boston Neighborhoods**

Strategic Focus: **Increase neighborhood stability and the production and preservation of affordable housing for vulnerable populations.**

**City Life/Vida Urbana, \$100,000**

*\$50,000 from the Permanent Fund for Boston and \$50,000 from the J.E. Adrien Blais Fund I—payable over two years in two equal installments*

For support of the Halt Post Foreclosure Evictions campaign, which combines organizing, legal advocacy, policy advocacy, and media, public relations and direct action to encourage banks to accept rent from tenants and former owners in foreclosure, or to sell the buildings to current occupants or to a nonprofit to ensure long-term affordability of the units

**Fairmount/Indigo Line CDC Collaboration, \$1,000,000**

*From the Permanent Fund for Boston—payable in five equal installments over five years*

To the Dorchester Bay Economic Development Corporation for operating support for the Collaborative, which seeks to create strong, vibrant and diverse communities along the Fairmount commuter rail corridor, by providing mixed-income housing, access to decent paying jobs and support for civic engagement activities

**Family Independence Initiative-Boston, \$450,000**

*From the Permanent Fund for Boston*

For general support of the Boston demonstration site, which will build networks of low-income families and support them in the areas of income and assets, education, health, housing and environment, social networks, and civic engagement

**Local Initiatives Support Corporation, \$250,000**

*From the Permanent Fund for Boston, payable in three installments, including \$50,000 in year one and \$100,000 in each of the following years*

For the Resilient Communities/Resilient Families project, which will focus on community organizing, service coordination and equitable, affordable transit-oriented housing production along the Fairmount Corridor

Strategic Focus: **Reduce the incidence of violence in Boston neighborhoods, especially among youth**

**Ella J. Baker House, \$75,000**

*\$16,000 from the Annie S. Dillaway Fund and \$59,000 from the Harriett M. Bartlett Fund*

For general support of the programming efforts of the Ella J. Baker House, which seeks to reduce youth-violence and improve the life chances for youth who are involved in violence, criminal activity, drug use, or are otherwise at risk

**Project R.I.G.H.T., Inc., \$75,000**

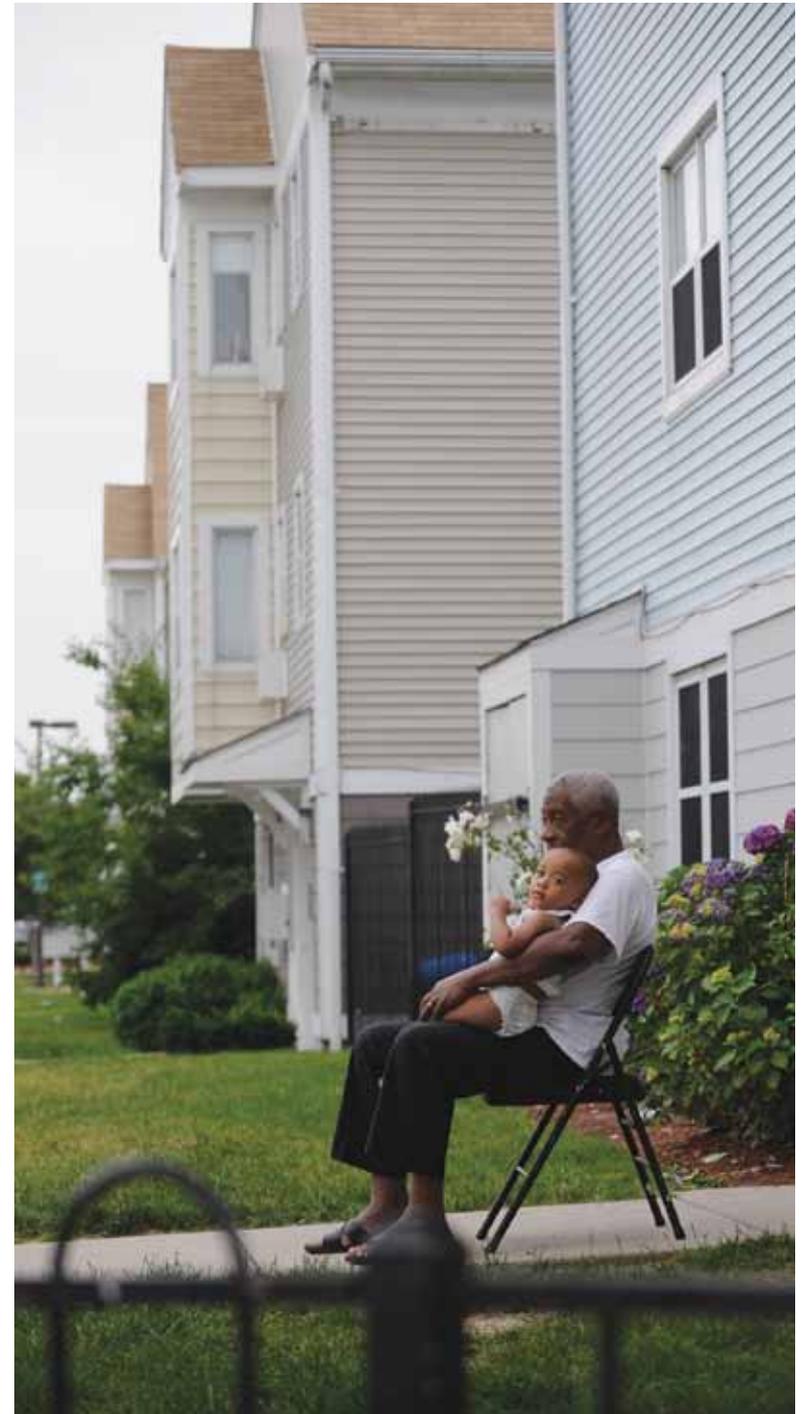
*\$60,000 from the J.E. Adrien Blais Fund I and \$15,000 from the Thomas F. Lambert, Jr. & Elizabeth Branon Lambert Fund*

To promote resident and youth leadership development and neighborhood stabilization through organizing, direct action, advocacy, education and coalition building, for its community outreach and engagement activities

**Stop Handgun Violence, Inc., \$25,000**

*From the Permanent Fund for Boston*

For general operating support for this organization, which seeks to prevent gun violence through education, public awareness, intervention in violence “hot spots,” and for advocacy



Objective: **Enhance civic and cultural vibrancy in Greater Boston**

Strategic Focus: **Strengthen and celebrate the region's diverse audiences, artists and nonprofit cultural organizations**

**Boston Landmarks Orchestra, Inc., \$100,000**

*\$15,000 from the Edward Hyde Cox Fund, \$25,000 from the Louise Phillips Bequest Fund, and \$60,000 from the Anna Faith Jones Arts Fund*

For its efforts to present free live classical music to metro Boston residents and visitors

**Boston Public Schools Arts Expansion Fund, \$200,000**

*\$100,000 from the Permanent Fund for Boston and \$100,000 from the Stephen & Sybil Stone Arts Fund, payable to EdVestors, Inc. over two years in two equal installments*

Project support for a fund that supports arts instruction in the Boston Public Schools

**Institute of Contemporary Art, \$300,000**

*\$245,000 from the Permanent Fund for Boston and \$55,000 from the Boston Foundation Arts Fund—payable over three years in three installments of \$125,000, \$100,000 and \$75,000*

General support for its presentation of visual, performing and media arts and learning programs for families, teens and adults and its efforts to build a larger and more diverse audience



Objective: **Increase job growth and economic equity and competitiveness in Greater Boston**

Strategic Focus: **Invest in strategies that increase Greater Boston's competitiveness, prosperity and efficiency, and create vibrant urban neighborhoods with opportunities for all residents**

**Workforce Strategy Center, Inc., \$150,000**

*From the Polaroid Fund*

For a research project, the Regional Workforce Development Plan for Community Colleges, which will seek to align community colleges with local industry needs

**Massachusetts Technology Collaborative, \$225,000**

*From the Permanent Fund for Boston, payable over three years in installments of \$100,000, \$75,000 and \$50,000*

For general support of the Life Sciences Collaborative's efforts to foster growth of the life sciences in Massachusetts and to advance a clearer understanding of the economic conditions that affect the life sciences cluster as a whole

**Lawyers' Committee for Civil Rights, \$50,000**

*\$47,000 from the Permanent Fund for Boston and \$3,000 from the Edward Everett Pearl Fund*

For the Belin Economic Justice Project, which provides pro bono business legal assistance and education to low income, minority and women entrepreneurs in economically disadvantaged areas

Strategic Focus: **Enhance the long-term vitality of the Massachusetts nonprofit sector**

**Catalyst Fund for Nonprofits, \$1,000,000**

*From the Permanent Fund for Boston—payable over five years in five equal installments*

For general support of the Catalyst Fund for Nonprofits, a funder collaborative designed to help nonprofits restructure in response to the current economic downturn by providing resources to catalyze promising collaborations

**Massachusetts Nonprofit Network, \$125,000**

*From the Permanent Fund for Boston*

For the Nonprofit Awareness, Education and Advocacy Program

## Selected Grants from Special Initiatives

The Boston Foundation plays a leadership role in developing focused initiatives in key areas of community life where intense involvement and investment have the potential for significant impact. Many of the grants made under special initiatives reinforce the Foundation's strategic goals and objectives through their focus on supporting the people and neighborhoods of Greater Boston. Here is a brief representative sampling of grants from some of these special initiative funds.

### Achieving the Dream

This is a multiyear national initiative created to strengthen the ability of community colleges to help students of color and low-income students earn degrees and certificates. Each year, the following community colleges receive major support through this initiative:

**Bunker Hill Community College, \$100,000**

**Roxbury Community College, \$100,000**

**Springfield Technical Community College, \$100,000**

## CHAMPS Boston

This 'youth development through sports' program has the goal of ensuring that every child in Boston has access to high quality athletic opportunities and that all youth coaches are of the highest quality and understand basic youth development and principles. Here are just a few of the grants made under this new program:

### **East Boston Girls Softball, Inc., \$500**

To build capacity of the softball league

### **Good Sports, Inc., \$30,000**

To encourage sports participation by providing access to sports equipment

### **Positive Coaching Alliance, \$22,000**

To promote high quality coaching



## The Food & Fuel Initiative

Grants totaling \$300,000 under this initiative provided crucial assistance for economically distressed households hard hit by the economic downturn. These are just a few of the grants made through a special fund created to support community members during hard times:

### **Pine Street Inn, \$25,000**

For shelter and supportive housing

### **Project Bread – The Walk for Hunger, Inc., \$75,000**

For case management training

### **Women's Lunch Place, Inc., \$25,000**

For food assistance, case management and other supports

## Grassroots Funding

Through its grassroots grantmaking, the Foundation has the capacity to respond quickly and nimbly to requests for small grants that can have an immediate and meaningful impact on Boston's neighborhoods and the residents who live in them. Here are just a few examples of grassroots grants made during 2010:

### **Escena Latina Teatro, \$2,000**

To help defray the costs for the company's spring production of *Los Arboles Mueren de Pie (Trees Die Standing Tall)*

### **LGBT Aging Project, \$1,000**

For the Red Carpet Reception to celebrate the International Premiere of *Gen Silent*, a new documentary from filmmaker Stu Maddux

### **Ralph Smith Residence Association, \$2,000**

For a "Senior Prom to Remember" for low-income elderly residents of Madison Park Village

## My Summer in the City

The Boston Foundation and StreetSafe Boston made grants totaling more than \$550,000 to 87 community-based organizations in every neighborhood in the city this year. The funds supported a cornucopia of positive activities throughout the summer for the city's youth and families. Here are just a few selected grants made this summer:

### **Artists for Humanity, \$3,000**

For the Live After Hours program

### **Boston Neighborhood Network Television, \$18,000**

For the Youth Media Street Team program

### **Opera Boston, \$4,000**

For Opera Factory 2010

## Out of the Blue

These are unsolicited, unrestricted grants made to nonprofit organizations that have strong leadership and engage in outstanding work.

### **ROCA, Inc., \$100,000**

### **Victory Programs, Inc., \$100,000**



## SkillWorks

This is a multiyear funders collaborative designed to improve workforce development in Boston and across the Commonwealth.

Here are several grants made this year through this initiative:

### **Crittenton Women's Union, \$155,000**

For the Workforce Solutions Group

### **Northeastern University, \$250,000**

For the Emergency Medical Career Partnership

### **Year Up, Inc., \$150,000**

For the Financial Services Partnership

## StreetSafe Boston

This is a multi-year initiative designed and led by the Boston Foundation to work with proven-risk young adults in Boston's most violence-afflicted neighborhoods through a program that involves highly-trained Streetworkers and other support systems. Here is some of the support provided by this initiative during 2010:

### **Black Ministerial Alliance, \$349,578**

For costs associated with program staffing and coordination

### **Boston Public Health Commission, \$130,000**

For the Streetworker training program

### **Boston Ten Point Coalition, \$272,581**

For support of the initiative's Streetworkers

## Vision Fund

Grants from this fund are awarded to organizations for special projects, programs and activities or for work that builds the management capacity of the organization. Here are some representative grants from this fund:

### **Associated Grant Makers, \$7,500**

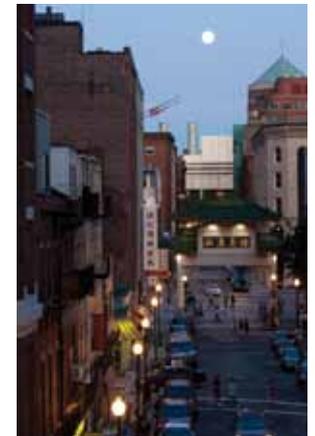
For implementation of a strategic plan

### **Boston Chinatown Neighborhood Center, \$7,500**

For an evaluation project

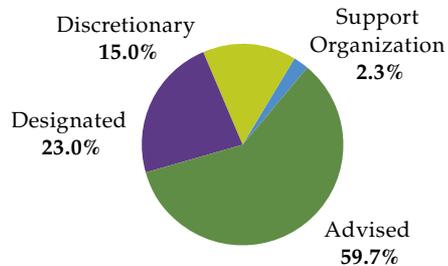
### **Massachusetts Immigrant and Refugee Advocacy Coalition, Inc., \$6,300**

For a strategic planning process



# About Grants from Other Types of Funds

## 2010 Grants Paid by Fund Type



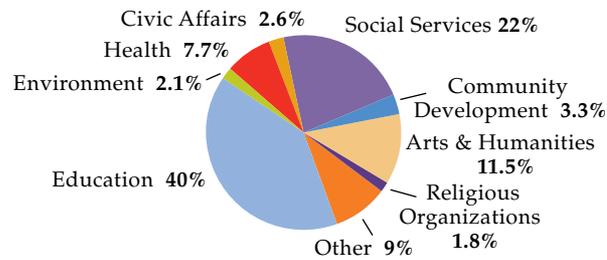
In addition to grants from Discretionary Funds, which are awarded through a competitive funding process to benefit the people and places of Greater Boston, the Boston Foundation also has other types of funds from which grants are made, including Designated Funds and Donor Advised Funds.

## Grants from Designated Funds

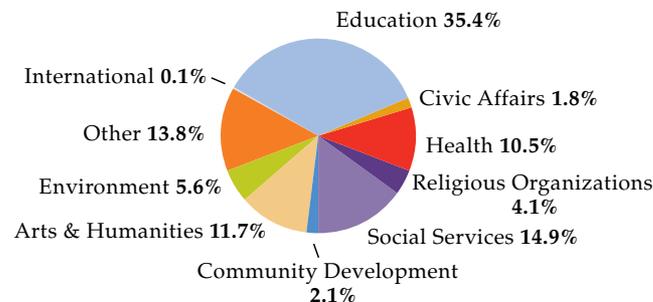
The Museum of Science. Rosie's Place. The Boston Symphony Orchestra. Villa Victoria Center for the Arts. Freedom House. WGBH. Many of Greater Boston's most important nonprofit organizations receive grants every year from Designated Funds that were established by individuals, families and organizations at the Boston Foundation to offer general operating support or annual funding for special programs.

Some of these funds are named after Boston luminaries, such as Red Auerbach, Julia Child, Arthur Fiedler and Muriel and Otto Snowden. Other funds honor family members or are named for the type of funding they support. In 2010, grants from Designated Funds totaled \$19.0 million.

## 2010 Designated Fund Grants by Sector



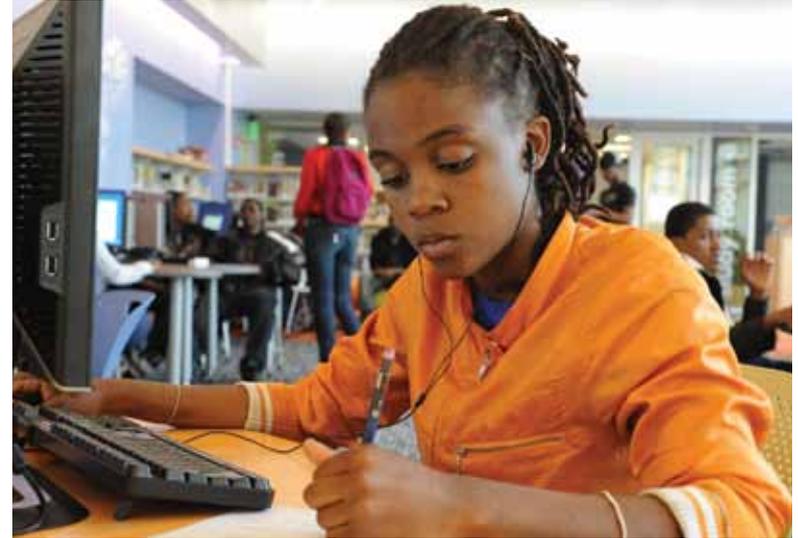
## 2010 Donor Advised Fund Grants by Sector



## Grants from Donor Advised Funds

A number of the Boston Foundation's donors are directly engaged in deciding what causes and which institutions will receive their support through Donor Advised Funds. The Foundation has hundreds of Donor Advised Funds, ranging in size from \$10,000 to \$40 million. Some were created by individuals or entire families—and others by organizations, corporations or associations.

This year, \$49.2 million was paid in grants from Donor Advised Funds, with 22 percent of the total going to nonprofit organizations that also received grants through the Boston Foundation's competitive



grantmaking process, showing a close alignment with the Foundation's strategic goals. Some 66 percent of grants from these funds go to nonprofit organizations in Massachusetts, with 94 percent of those grants targeting Greater Boston specifically.

Four percent of grants from these funds went to international organizations this year, a larger percentage than usual because so

many donors responded to the call for the relief and reconstruction funding for Haiti through the Haiti Fund at the Boston Foundation (see article on page 68). Grants from Donor Advised Funds support a wide variety of community activities, with the largest percentage of grants going to education.

# How to Apply for a Grant

Each year, the Boston Foundation distributes about \$12 million in discretionary grants, the majority of which comes from its Permanent Fund for Boston, an endowed pool of funds contributed to by donors who want to see this community thrive. These funds are awarded in a competitive process through a variety of grantmaking programs that are open to requests from nonprofits serving or benefiting the people of Greater Boston. All grants are approved by the Foundation's Board of Directors. To be eligible for support, an organization must be tax-exempt (or operate under the fiscal sponsorship of a tax-exempt nonprofit) and primarily serve the people of Greater Boston, with the exception of regional, statewide or national public policy efforts that may benefit a substantial portion of the community.

## A Focus on People and on Place

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with areas of strategic focus under the Foundation's major goals and objectives:

Goal: **Greater Boston residents are successful and thriving**

Objective: **Improve outcomes for Boston's residents across the education pipeline**

Strategic Focus: **Accelerate structural reform and promote innovation in public schools in Boston**

**Increase the 2- and 4-year college graduation rate for low-income, minority and first-generation college students from public schools in Boston**

**Promote the career advancement and economic security of low-income individuals**

Objective: **Increase the health and wellness of Greater Boston residents**

Strategic Focus: **Encourage healthy behaviors among Boston residents and increase access to healthy food and opportunities for physical activity**

Goal: **Greater Boston neighborhoods and communities are vibrant, safe and affordable**

Objective: **Increase the livability, affordability and safety of Greater Boston Neighborhoods**

Strategic Focus: **Increase neighborhood stability and the production and preservation of affordable housing for vulnerable populations**

**Reduce the incidence of violence in Boston neighborhoods, especially among youth**

Objective: **Enhance civic and cultural vibrancy in Greater Boston**

Strategic Focus: **Strengthen and celebrate the region's diverse audiences, artists and nonprofit cultural organizations**

Objective: **Increase job growth and economic equity and competitiveness in Greater Boston**

Strategic Focus: **Invest in strategies that increase Greater Boston's competitiveness, prosperity and efficiency, and create vibrant urban neighborhoods with opportunities for all residents**

**Enhance the long-term vitality of the Massachusetts nonprofit sector**

## Types of Grants

Three principal types of grants are considered through our competitive grants process:

### General Operating Support Grants

The majority of the Boston Foundation's competitive grants are made to support the core operations of organizations with missions and activities that are highly aligned with the Foundation's areas of strategic focus.

### Project Support Grants

The Foundation also makes grants to support specific projects or programs that are highly aligned with the Foundation's priority strategies.

### Special Opportunity Grants

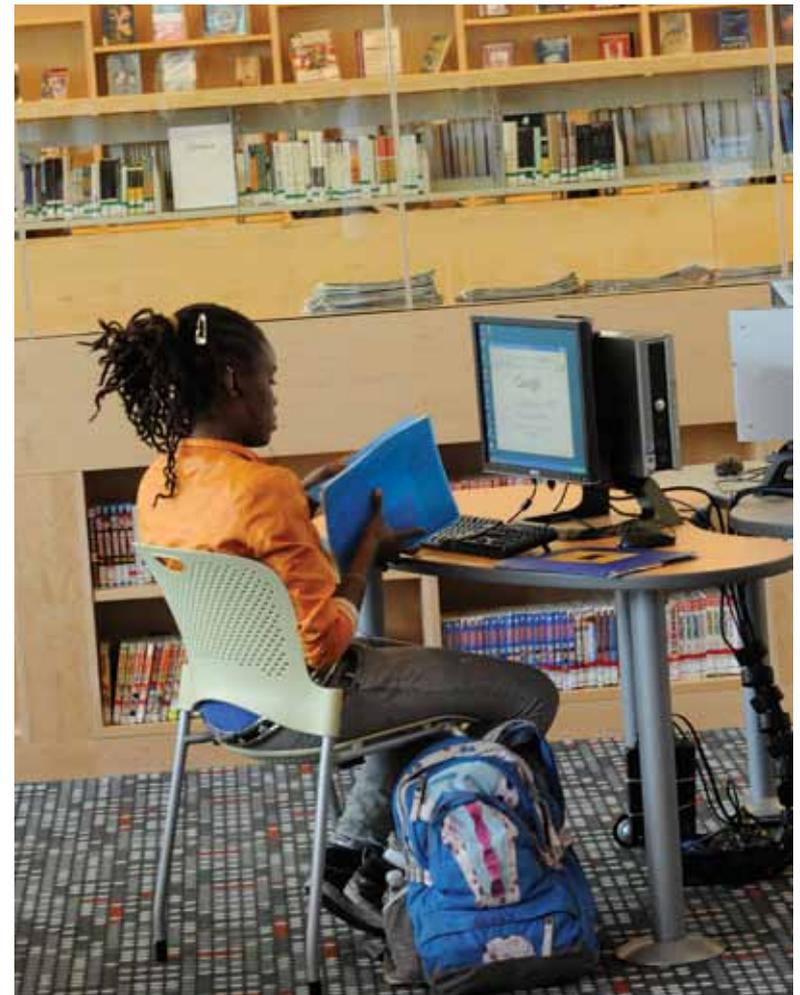
The Foundation provides an open door to new ideas for tackling long-standing or emerging problems in our community that may or may not be directly aligned with our priority strategies.

Other types of grants are made through special initiatives and other programs, which are detailed on our website.

## A Flexible Application Process

Nonprofit organizations apply for grants from the Boston Foundation on their own timetable through a flexible process that begins with the submission of an online Letter of Inquiry.

*We invite you to visit our website for detailed information about how to apply for a grant from the Boston Foundation. Please go to [www.tbf.org](http://www.tbf.org) and choose Grant Seekers.*



# Becoming a Donor



## Customizing Charitable Solutions One Donor at a Time

Your vision joined with our experience means that together we can design a philanthropic plan that fits your goals. We will marry your aspirations and passion for giving with our deep understanding of the

important issues facing our communities to achieve results that matter.

Whether you are just beginning your philanthropic journey or possess a high level of clarity and sophistication, we strategically tailor solutions to serve you and create positive change for the causes you care about.

## Expertise and Service That Can Maximize Your Giving

We have an entire Philanthropic and Donor Services Department to assist you. Our knowledgeable staff serves as a liaison with charities close to home and far away—lending expertise on a wide range of issues and helping you measure the impact of your giving. We will invite you to forums on important issues, introduce you to other donors and include your entire family.

## Meeting Your Goals Through a Donor Advised Fund

The Boston Foundation has been a Donor Advised Fund expert for 30 years and has hundreds of these funds—ranging in size from \$10,000 to \$40 million. A Donor Advised Fund operates much like a private foundation, without the administrative or payout burdens. You make unlimited grants anywhere in the U.S. or abroad when it is most convenient for you—and receive the maximum charitable tax deduction every time you add to your fund. It's quick and easy to set one up.

## Helping You Create a Lasting Legacy Through Estate Planning

We also offer many ways to incorporate charitable giving into your estate planning—and will help you decide which type of gift is right for you. You can make a gift by will or trust; gifts of retirement plan assets and life insurance; and gifts that pay you income and preserve assets for your heirs.

## Investing in the Future Through the Permanent Fund for Boston

You can also make a permanent gift to Greater Boston's primary endowment, which

### Choosing the Contribution That's Right for You

We accept gifts of cash, stocks and bonds, complex assets, including closely held or restricted stock, gifts of real estate and LLC or partnership interests. Whether you make a charitable gift during your lifetime or through your estate, we can accommodate your giving plans.

has been built by hundreds of donors since 1915, with confidence that it will always be used to meet the most urgent needs facing our community. These are the funds that support all of our competitive grantmaking in Greater Boston. Permanent gifts can also be directed to a cause or issue that means the most to you—or even a specific nonprofit organization that has made a difference in your life.

## Having an Impact Through the Civic Leadership Fund

Many Boston Foundation donors and others make an annual gift to the Civic Leadership Fund, which fuels innovation by helping the Foundation identify and address critical challenges facing our community. Through gifts to this fund, the Foundation publishes cutting-edge research, holds compelling public forums and creates action plans for positive change, making real progress in education reform, health and wellness, smart-growth housing and our cultural infrastructure.

## Why Choose the Boston Foundation?

- We will design a program of philanthropy that's just right for you.
- We are experts at Donor Advised Funds and can simplify your giving by providing support and guidance.
- We can help you with your private foundation or move it into a Donor Advised Fund.
- You can be as involved as little or as much as you would like in the Boston Foundation's work in Greater Boston and the region.
- We will help you with succession planning and offer ways to create a lasting legacy through estate planning.
- Our highly-diversified investment vehicle, the Fund for the 21st Century, maximizes your charitable dollars through a long-term investment strategy.

*For more information about becoming a donor or making a planned or legacy gift, call the Development Office at 617-338-1700 or visit the Foundation's website at [www.tbf.org](http://www.tbf.org) and choose Giving.*

# Boston Foundation Funds

**H**undreds of individuals, families and businesses have immeasurably strengthened the Greater Boston community by establishing and contributing to funds at the Boston Foundation. The Foundation works closely with donors to strengthen their giving—and helps an ever expanding number of individuals and families take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list all of the funds that are held by the Foundation and the many donors who have contributed to them. Each fund has its own name, purpose and history, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston’s community foundation for today and the future.

## New Donors to the Permanent Fund for Boston

Anonymous Fund  
at the Boston Foundation  
Ms. Terri Chang

Mr. Colin Colby  
Ms. Wendy Friel  
Estate of Anne C. Gray

Ms. Michaela June  
Mr. Peter Moris  
Paul and Rebecca Tepper

## 42 New Funds Were Established in 2010

The Boston Foundation gratefully acknowledges the generous and community-minded people who established new funds at the Boston Foundation during 2010.

### Discretionary Funds

Haiti Relief and Reconstruction Fund  
Rev. Ray A. Hammond Fund for the  
Neighborhoods of Boston

### Designated Funds

Thomas G. Curtin – Bobby Kargula Nanae Fund  
William & Sean Kelley Scholarship Fund  
Katharine Rayner Fund for the New York Public  
Library  
Margaretta Taylor Animal Medical Center Fund  
Margaretta Taylor Eaglebrook School Fund  
Margaretta Taylor Fund for Brooks School  
Pauline Toumpouras Fund

### Donor Advised Funds

Adlib Foundation  
Aley Fund  
Jessie B. Cox CLT – Cox Family Fund  
John H. Deknatel Family Fund  
W. Deknatel Charitable Fund  
Elizabeth Dodson Gray Fund  
Fish Family Fund  
FUEL Accounts Fund  
Fuller Trust, Inc. Fund  
Gannon Family S.U.N. Fund  
Gergen Family Fund  
Laurie Gould and Stephen Ansolabehere Fund  
John P. Herrick Fund  
Interstitial Fund  
Louis and Marcia Kamensky  
Donor Advised Fund

LandWave Fund  
Roger & Clarissa Lee Family Fund  
Marjorie L. and James M. Lober Fund  
LPL Financial Charitable Fund  
McSweeney Family Charitable Fund  
Murchison/Silvia Charitable Gift Fund  
Stephen Sears and John Lavryssen Fund  
Staufenbiel Aley Fund  
Joseph D. Warren Fund  
Gordon Weil, Jr. Fund

### Special Initiative Funds

Arts Capitalization Technical Assistance Fund  
Catalyst Fund for Nonprofits  
CHAMPS Boston

## Planned and Legacy Gifts Received

Many Boston Foundation donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad and diverse group of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, and gifts of retirement plan assets and life insurance. The following planned and legacy gifts were received in 2010 and are gratefully acknowledged.

Albert Anderson Family Trust  
Frances H. Anderson Trust – 1994  
Estate of George P. Beech  
Jessie B. Cox Charitable Lead Trust  
Estate of Mary Farr  
Estate of Lucy Fields  
Estate of Americo Francisco  
Estate of Anne C. Gray

Donald Gregg Trust  
Charles Hapgood Trust  
Joseph E. & Frances E. Heney Charitable Trust  
Ruth S. Holmberg Charitable Lead  
Annuity Trust  
Michael Kidder Charitable Lead Annuity Trust  
Peter S. Lynch Charitable Unitrust  
Mason Charitable Remainder Annuity Trust

Estate of Alice McGrath  
Estate of Mary Greene Nelson  
Joseph and Katherine O'Donnell  
Charitable Trust  
ShIPLEY 1996 Charitable Lead Trust  
Estate of Thomas Wilson Stephenson  
Estate of Pauline Toumpouras  
E.C. Winship '87 Trust

## Rogerson Legacy Society

Named for founders of the Boston Foundation, the Rogerson Legacy Society recognizes those donors who have included the Boston Foundation in their planned and estate gifts to benefit a variety of charitable funds. Through their thoughtful generosity and foresight, these donors have created an important legacy to ensure the future strength and vitality of our community.

Mary Lee T. and Peter C. Aldrich  
G. Thomas and Allison Aley  
**Howard and Carol Anderson**  
**Diane DeSerras Arenella**  
David Arnold, Jr. and Dorothy Arnold  
**Mrs. John Atkinson**  
Geoffrey D. Austrian  
Theodore S. Bacon, Jr.  
Sherwood E. Bain  
Mary Barber  
Laurie A. Bencal, CPA  
Doreen B. Biebusch  
Thomas W. Bird  
Beryl H. Black  
David Blot  
Janine Bouchard  
Kenneth S. Brock  
Jacob F. and Barbara C. Brown

Beryl H. Bunker  
George E. Burden  
Nonnie S. Burnes and  
Richard M. Burnes, Jr.  
Margaret A. Bush  
Frank and Ruth Butler  
Robert B. Canterbury  
Helen T. W. Chen and Keith R. Ohmart  
**Edward A. and Penny Cherubino**  
Arthur D. Clarke and Susan P. Sloan  
Margaret J. Clowes  
Frances F. Connelly  
Lewis and Constance Counts  
Elizabeth D. Coxe  
Diane Currie  
Elizabeth T. Damon  
Marilyn Darling  
David S. and Mrs. Shirley G. Dayton

Lucy S. Dillon  
**Ralph J. Donofrio**  
Joy G. Dryfoos  
Malcolm Dunkley  
**Catherine Axon and Thomas M. Elder**  
Anita Maria Elliott  
Amy Zell Ellsworth  
Marjorie B. Esselen  
June M. Ficker  
**Joe Fiorello**  
Walter Eugene Geier\*  
Robert J. Glaser, M.D.  
Sandra and Philip Gordon  
**Kate and Thierry Guedj**  
Dr. G. Anne Guenzel  
Thomas Hale  
Charlotte I. Hall  
Mrs. Chester Hamilton

*continued on page 60*

# Bill Nigreen and Kathleen McDermott

## A Community Legacy to Benefit the Permanent Fund for Boston

**W**hen Bill Nigreen and Kathleen McDermott began their long-term estate planning—including their legacy to the community—they turned for guidance to the Boston Foundation.

Bill is a familiar figure at the Foundation, having attended many *Understanding Boston* forums, and is a “big fan” of the Boston Indicators Project’s research placing Boston in a regional and global context. “The Foundation enlivens its space with thought-provoking events and opens its doors to the community,” he said during a conversation this fall. “It does far more than make grants—it thinks strategically about the issues. Research and strategic thinking make philanthropy much more powerful and its effectiveness can be measured.”

Through his consulting business, *Facilitation for Social Change*, Bill has worked with many Boston arts and cultural organizations on community building and sustainable growth. Before launching his business, he had quality improvement roles at Analog Devices, Fidelity Investments and New Profit Inc.

“When Kathleen and I thought about leaving a community legacy, we knew the Boston Foundation could determine, fifty years from now, where Boston’s needs will be greatest,” he said. “I’m glad that our contribution will carry on forever and be relevant over time.” The largest share of their community legacy is an unrestricted gift to the **Permanent Fund for Boston**, the Foundation’s most flexible fund and the one that addresses the broadest cross-section of community needs. The rest will benefit the **Civic Leadership Fund**, which supports the Foundation’s research, forums and public policy work,

and the **Boston Foundation Arts Fund**. “I’ve seen what a difference the Foundation’s grants have made in increasing access to the arts in Boston,” Bill explained, “and I appreciate the Foundation’s catalytic role in passing legislation for statewide cultural facilities funding.”

Both Bill and Kathleen have increasingly focused their own work on the arts. While Kathleen began her career as attorney, today she is an artist herself and teaches History of Fashion at the Massachusetts College of Art and Design. Bill serves as Chair of the Board of Overseers of Boston Landmarks Orchestra. Both are “crazy about” opera, but you’ll find them at all kinds of Boston arts events. “We especially enjoy exploring and supporting the amazing dynamism of Boston’s smaller arts groups,” said Bill. “Boston is a destination city for high-skilled workers and tourists alike largely because of its vibrant cultural life. Besides such world-class venues as the BSO, MFA and Emerald Necklace parks, Boston is a great city for post-secondary arts education.

“The arts transcend ordinary ways of thinking and portray diverse points of view. A healthy community shares experiences, values and aspirations. What bridges differences between people and brings communities together better than the arts?”

*Kathleen McDermott and Bill Nigreen.*

*See page 57 for a list of all Planned and Legacy Gifts to the Boston Foundation.*



## Rogerson Legacy Society

*continued from page 57*

Marilyn L. Harris

Barbara Hauter Woodward

**Ann S. Higgins**

Petie Hilsinger

Kenneth D. and Cynthia L. Holberger

Chuck and Gayle Holland

Helen R. Homans

Marjorie Howard-Jones

**Muriel Hurovitz**

**Brian Hyde**

**Jane Wegscheider Hyman**

Stephen G. and Rosemarie Torres Johnson

**Helen M. Jones**

Karen A. Joyce and John Fitzgerald

Ms. Ruth G. Kahn

Mr. Andrew M. Kamarck

Christian F. Kearney

Gary P. Kearney, M.D. and Susan Kearney

Michael C. Kearney, M.D.

Shanon C. Kearney

Alison Kearney North

**Jonathan M. and Judith B. Keyes**

**Vera Kilstein**

Alan J. Greenfield and G.P. Paul Kowal

Barbara N. Kravitz

**Peter and Stephanie Kurzina**

Frances J. Lee-Vandell

**Carol F. Levin**

John H. Livens

Donald J. and Susan Kelley MacDonald

**Myron\* and Barbara Markell**

Robert and Poppy Mastrovita

**Stephen J. McCarthy**

Alice McGrath\*

Edward J. and Jane S. Michon

Robert Minnocci

**Timothy and Deborah Moore**

Charles Fessenden Morse

Donald M. Morse

Frederick W. Neinas, MD

Mary Greene Nelson

**F. William Nigreen and Kathleen McDermott**

Carl H. Novotny and Rev. Judith Swahnberg

Mark A. and Judith A. Osborne

**Jennifer Jossie Owens**

Douglas D. and Geraldine Payne

**Nancy E. Peace**

Drs. Robert A. and Veronica S. Petersen

Agatha W. Poor

**Nathaniel Pulsifer**

Glendora M. Putnam

Irving W. Rabb

Warren Radtke and Judith Lockhart Radtke

Chris Remmes

Richard L. Robbins

Sumner and Helen Rodman

Eleanor L. Ross

Edith M. Routier

Jordan S. Ruboy, M.D.

John A. Russell

Beverly H. Ryburn

Anthony Mitchell Sammarco

Margaret Schmidt and Kenneth Danila

Ruth Gessner Schocken

Charles R. Schroeder

Norman J. and Maryellen Sullivan Shachoy

Annabelle W. Shepherd

**Binkley and Paula Shorts**

**Ellen L. Simons**

Cheryl H. Smith

William F. Spang

Scott E. Squillace and Shawn M. Hartman

David F. Squire

Thomas W. Stephenson

Arthur L. Stevenson

Ellen Stillman

Anne B. Stone

**Elihu and Bonnie Stone**

Congressman Gerry E. Studds\*  
and Dean T. Hara

**Anne Thompson**

Libby and Sidney Topol

**Alan and Pamela Trefler**

David F. Tuttle, Jr.

Jean-Paul and Rebecca Valette

Joy E. Van Buskirk

Peter S. and Pamela L. Voss

**Robert R. Wadsworth & Catherine E. Moritz**

J. H. Walton, Jr. and Carolyn Walton

Gordon Weil, Jr.

Elizabeth A. Wheeler

Constance V. R. White

Eric S. and Linda H. White

Inge J. Wetzstein

Michael N. and Mary M. Wood

Eleanor D. Young

Anonymous Society Members = 82

\* Deceased

**Bold Names** = Permanent Fund for Boston & Field of Interest Gifts

## Donors to the Civic Leadership Fund

This important fund helps to fuel the Boston Foundation’s highly effective formula for civic leadership, which includes: publishing cutting edge research; holding major forums and convenings; conducting strategic and proactive grantmaking; forming task forces and coalitions; using communications and the media—and engaging in deep public policy work. A number of areas of community life have benefited from this work, including public education, smart growth housing, cultural facilities funding and CORI reform.

Anonymous donors (12)	Fay M. Chandler	Thomas D. Dretler
A.W. Perry, Inc.	Chertavian Family Fund	John E. and Kathleen M. Drew
Abrams Foundation	Robert Choo	The Druker Company, Ltd.
Abt Associates Inc.	Citizens Bank Foundation	Eastern Bank Charitable Foundation
Allyn Foundation, Inc.	Ferdinand Colloredo-Mansfeld	Eaton Vance Investment Counsel
Carol and Howard Anderson Family Fund	John M. Connors, Jr.	William S. Edgerly
Atalaya Fund	Michael and Joan Contompasis	Equity Office Properties Trust
Sandy J. Bailey	Conventures	Michael and Barbara Eisenson
Bank of America Charitable Foundation	Cooper Leeser Family Fund	David and Marion Ellis
Bank of New York Mellon	Corcoran Jennison Companies	Eos Foundation
Baudanza Family Fund	Constance and Lewis Counts Fund	Feeley and Driscoll, P.C.
Beacon Capital Partners	Robert Lewis, Jr.	Robert L. Feinberg
Robert L. Beal	The Josephine and Louise Crane Foundation	Ian and Corinne Ferguson
James and Susan Beck	Stephen Crosby and Helen Strieder	Grace Fey
Joshua and Anita Bekenstein	Dainger Fund	Fiduciary Trust Company
Bilezikian Family Foundation	Catherine D’Amato	Marjorie M. Findlay and Geoffrey T. Freeman
Thomas W. and Tracey S. Bird	Dammann Boston Fund	Paul and Phyllis Fireman Charitable Foundation
Blue Cross Blue Shield of Massachusetts	Andre and Marilyn Danesh	Fish Family Foundation
Joan T. Bok Fund	Morton and Dinan Danseyar Family Foundation Inc.	Laurence B. Flood and Mary Tyler Knowles
Boston Digital Bridge Foundation, Inc.	Darling Family Fund	Forshey Family Fund
Boston Globe	Corey L. Davis	Susan Y. Friedman
Globe Mallow Fund	Glen Davis and David S. Aghassi	FUEL Accounts Fund
Boston Herald	The Davis Companies	Fulkerson Family Fund
Boston Private Bank & Trust Company	Denham Capital Management	Brendan Furey
Amy and F. Gorham Brigham, Jr.	Denterlein Worldwide Public Affairs	Gabrieli Family Foundation
Peter A. Brooke Fund	Giving Three Fund	Anna A. Gallo
Lord-Buck Fund	Gururaj and Jaishree Deshpande	Gannon Family Charitable Fund
Bill and Barbara Burgess Fund	DeWolfe Family Fund	Richard C. and Louisa Garrison
William T. Burgin Fund	Dibble Family Fund	Genzyme Corporation
Richard M. Burnes, Jr.	Lawrence S. DiCara	Robert E. Giannino-Racine
Catherine and Paul Bittenwieser Foundation	Dodson Family Charitable Fund	Spencer Glendon and Lisa Tung
Louis and Julie Casagrande	Ralph J. Donofrio	Carol R. & Avram J. Goldberg Fund

# Robert Beal

## Donor to the Civic Leadership Fund at the Boston Foundation

**E**very annual campaign for the Civic Leadership Fund at the Boston Foundation receives gifts from hundreds of donors committed to supporting the role the Foundation has developed over the last ten years—as a publisher of cutting edge research, a neutral convener and a pioneer in helping to shape legislation that is benefiting our city and region. There is no more faithful supporter of the fund than Robert

Beal, beloved civic leader and President of The Beal Companies. He has made a gift every year since the Fund was launched in 2003.

“The Boston Foundation is central and important to this community,” says Mr. Beal about his consistent support of the Civic Leadership Fund. “It is known for its philanthropy, but also for its outstanding leadership in helping to build a better city. I’m also very impressed with the Foundation’s ability to work with government and other philanthropies to advance mutual goals.”

Mr. Beal is known for his own ability to bring people together. He has served on—and often led—the boards of dozens of nonprofit organizations and recently was at the heart of the process that led to the Boston Opportunity Agenda, a historic education partnership created to make Boston the premier city of upward mobility where everyone can have access to greater opportunity. The Agenda brings together all of Boston’s four public charities, including the Boston Foundation, the City of Boston and a number of private foundations. “The Boston Opportunity Agenda could not have happened without Robert Beal,” says Paul S. Grogan, President and CEO of the Boston Foundation. “Thousands of children will benefit from his leadership.”

*Robert Beal, shown here in The Beal Companies’ offices with his faithful companion Mountie II, was the impetus behind the Boston Opportunity Agenda, a historic partnership focused on improving education for all of Boston’s residents. See page 61 for a list of all gifts to the Civic Leadership Fund.*



Philip and Sandra Gordon  
Gourmet Caterers  
Roger C. Greene  
Paul S. Grogan and Karen Sunnarborg  
Kate and Thierry Guedj  
Guenzel-Pieters Family Fund  
H.N. Gorin, Inc.  
Ray Hammond  
Harvard Pilgrim Health Care  
Anthony M. Helies  
Petie Hilsinger Fund  
Margaret Hixon Fund  
Thomas and Diane Hollister  
Brian Hyde  
Income Research & Management  
Ira A. and Martha Jackson  
Jacobson Family Foundation Trust  
Jackie L. Jenkins-Scott  
John Hancock Financial Services  
Stephen and Cheryl Jonas  
Jeffrey F. and Susan C. Jones  
Tripp and Robin Jones  
David Kalan  
Albert J. and Diane E. Kaneb Family Fund II  
Martin S. Kaplan  
Karp Family Foundation  
Brian H. Kavogian  
Michael B. Keating  
John Keezell  
Jonathan M. and Judith B. Keyes  
Peter Carter Knight and  
Deborah Sanford Knight  
KPMG, LLP  
The Robert & Myra Kraft Family  
Foundation, Inc.  
Kravitz Family Fund  
Paul A. and Mary E. La Camera  
Brooks Bradley Lambert-Sluder  
G. Barrie Landry Fund

John LaPann  
Barbara Lee Family Foundation Fund  
Edward P. and Patricia K. Leibensperger  
C. Martin Leinwand Fund  
Mary Kay Leonard and Richard W. Valachovic  
Liberty Mutual  
Martin Liebowitz and Mary M. Lassen  
LMG Fund  
Longfield Family Foundation, Inc.  
Lynch Foundation  
Margaret Mack and John Powell  
Martin and Tristin Mannion  
Claudio Martinez  
Sydell and Edward I. Masterman Fund  
Priscilla A. Mauro  
McCall & Almy, Inc.  
Kevin McCall  
Wm. Shaw McDermott  
Andrew McDowell  
Robert F. Meenan  
Mary Jo Meisner  
Massachusetts High Technology Council  
Mass Insight Education and Research Institute  
Mellowes Fund  
Robert T. P. Metcalf  
Jack and Beth Meyer  
Mill River Foundation Fund  
Scot A. and Lorraine L. Miller  
David and Mary Ellen Moir  
Lynne Salkin Morris and Andrew Morris  
Robert S. and Mary Helen Morris  
Herbert E. Morse  
Frances S. Moyer  
Muddy Pond Trust Fund  
David G. Mugar Fund  
Sherif and Mary Nada  
NAIOP Massachusetts  
Tami Nason and Kent Lage  
National Development

National Grid  
Max Nibert  
L. Bouke and Amy Noordzij  
Northern Trust Bank  
Kenneth and Marianne Novack  
Novotny/Swahnberg Fund  
Mark E. Nunnally and Denise M. Dupre  
Obermayer Foundation, Inc.  
O'Brien Family Fund  
Joe O'Donnell  
Thomas L. P. O'Donnell  
Ronald P. O'Hanley  
Thomas P. O'Neill, III  
Ruben D. Orduña and Elizabeth G. Hill  
P & G Gillette Company  
Palisades Fund  
Jeffrey D. Paquette and Heidi Johnson  
Parker Family Fund  
Harold & Nancy Parritz Family Foundation  
Partners HealthCare  
Elizabeth Pauley  
Thomas and Ellen W. Payzant  
Kevin and Anne Phelan  
PricewaterhouseCoopers LLP  
Prime Buchholz  
Susan Prindle  
Sue and Bernie Pucker Fund  
The Irving and Charlotte Rabb  
Charitable Foundation  
Red & Blue Foundation  
Remmer-Fox Family Fund  
Reno Family Charitable Foundation  
Gary and Natalie Robinson  
Rodgers Community Fund  
William G. Rogerson  
Rohda Family Charitable Foundation  
Jordan S. Ruboy  
Rust Bowl Fund  
Rutabaga Capital Management

Paul and Ann Sagan  
Schawbel Family Fund  
Helen Chin Schlichte  
Schoen Family Foundation  
Mark J. and Marie L. Schwartz  
Charles S. and Zena A. Scimeca Charitable Fund  
David and Marie Louise Scudder  
Greg A. and Michelle A. Shell  
Daniel I. Sherman  
Sherman Family Foundation Fund  
Charles E. and Deana M. Shirley  
Karen Siegel  
John Silber  
John G. Simon  
Gary and Lynne Smith

Richard and Susan Smith Family Foundation  
Gail Snowden  
Sovereign Bank  
Helen B. Spaulding  
William and Christine Speciale  
Stephanie H & David A Spina  
Family Foundation  
Micho and William J. Spring  
David F. Squire Family Fund  
Stone Charitable Fund  
James and Cathleen Stone  
Matthew J. & Gilda F. Strazzula Foundation  
Suhrbier Family Fund  
Summit Financial Corporation  
Sunrise Fund

TA Associates Realty  
Michael K. Tooke  
Gregory Torres and Elizabeth Pattullo  
Elaine Ullian  
Alfred F. Van Ranst, Jr.  
Wainwright Bank Community Fund  
William J. and Linda M. Walczak  
Robert W. and Joan S. Weinstein  
Benjamin R. Wheeler  
Benaree P. and Fletcher H. Wiley  
Winn Development Company  
Lovett-Woodsum Family Fund  
Hungwah Yu and David J. Elliott  
Zabin Charitable Fund

## Discretionary Funds

Many donors have established funds that are totally unrestricted or have broad purposes, giving the Boston Foundation flexibility in the way the income is used. These are the primary funds for which Greater Boston area nonprofit organizations may apply. They provide support to programs that address a broad range of community needs. The following is a list of all Discretionary Funds established at the Boston Foundation since 1915.

## The Permanent Fund for Boston

The Permanent Fund for Boston is the most flexible fund the Boston Foundation holds, giving our staff and board the resources they need to respond to the most critical issues facing contemporary Greater Boston. The following includes donors who have made gifts totaling more than \$5,000 to this fund, with the year of their first contribution noted in parentheses.

### Individuals, Corporations and Foundations

Anonymous (2004)  
Mr. and Mrs. Pelealter Brooke (1994)  
The Boston Company (1991)  
Peggy A. Brown (2008)  
Henry Burkhardt, III (1986)  
Catherine and Paul Bутtenwieser  
Foundation (2003)  
William Putnam Cabot (1970)  
Dorothy Jordan Chadwick Fund (2002)  
Chester County Community  
Foundation, Inc. (2007)

Michael F. Cronin (2004)  
Lawrence and Susan Daniels Family  
Foundation (2003)  
Wm. Arthur Dupee Memorial Fund (1984)  
Virginia Ellis Memorial Fund (1976)  
Leon R. Eyges Memorial Fund (1963)  
George R. Farnum (1982)  
First National Bank of Chicago (1988)  
Martha M. Fosdick Fund (1978)  
John Lowell Gardner Fund (1987)  
Grand Bostonians Dinner (1984)  
Anne C. Gray (2010)

Mrs. Jean Hanlon (1991)  
Haymarket People's Fund (1994)  
HBB Foundation (1995)  
Katherine B. Hood (2000)  
Donald J. Hurley Memorial Fund (1978)  
Jane W. Hyman (2002)  
Institute for Affirmative Action (2007)  
Mr. Stephen P. Jonas (2007)  
John S. and James L. Knight Foundation (2009)  
Dr. & Mrs. Arthur R. Kravitz (1987)  
Mr. and Mrs. Gael Mahony (1982)  
The Overbrook Foundation (1991)

Francis Ward Paine Foundation, Inc. (1982)  
Harry & Minnie Rodwin Memorial Fund (1975)  
Pamela M. Smith (2006)  
Reynolds R. and Pamela M. Smith  
Foundation (2008)  
Dr. W. Davies Sohler, Jr. (1990)  
Mrs. Helen Spaulding (1992)  
Matthew J. & Gilda F. Strazzula  
Foundation (2000)  
Gertrude T. Taft (1956)  
Tech/Ops, Inc. (1982)  
United Asset Management Corporation  
(1994)  
Ms. Hungway Yu and Mr. David J. Elliott  
(2002)  
Albert and Judith Zabin (2008)

## Estates

Alice A. Abbott (1967)  
Matilda S. Alley (1964)  
Miriam S. Alley (1965)  
Margaret Sears Atwood (1970)  
Margaret E. Babcock (1973)  
Annie O. Baldwin (1953)  
Wilbert S. Bartlett (1969)  
Reginald Benting (1984)  
William L. Birely (1959)  
Edmund Bridge (1933)  
Frederick W. Bridge (1942)  
Jesse F. Burton (1971)  
Susan Cabot (1947)  
Charles T. Carruth (1983)  
Gladys Chiquoine (1983)  
Helen A. Claflin (1992)  
William H. Claflin (1983)  
Winifred I. Clapp (1990)  
Horace W. Cole (1992)  
Anastasia Conte (1988)  
Arthur S. Cummings (1943)  
Charlotte E. H. Curtis (1940)

Maria Corinne Dana (1963)  
Luisita L. Denghausen (1990)  
Kenneth S. Domett (1960)  
Mary Frances Drown (1929)  
George H. Eastman (1971)  
Benjamin Fisher (1996)  
Edith R. Fottler (1948)  
Alma L. Frost (1948)  
Anna C. Frothingham (1941)  
Forrest C. Gates (1970)  
Mary M. Geist (1982)  
Pauline S. Germeshausen (2006)  
Anne C. Gray (2010)  
Donald Gregg (1963)  
Patricia Grisham (1964)  
Joseph Guild (1964)  
John Hagopian (2002)  
Ellen Page Hall (1931)  
Dorothy C. Harris (1967)  
Elizabeth M. Hay (1972)  
Fred R. Hayward (1969)  
Elizabeth D. Herteli Trust (2005)  
Vladimir H. Herteli Trust (2005)  
Anna P. Hills (1969)  
Agnes G. Homes (1961)  
Adeline D. Hooper (1973)  
Mary Frothingham Hooper (1961)  
Elizabeth B. Hough (2002)  
Elizabeth B. Hurley (2000)  
Frances A. Jordan (1978)  
Paul Kimball (1964)  
James G. Knowles (1982)  
Ida Fales Lamb (1967)  
James Longley (1918)  
Clara N. Marshall (1943)  
Ann G. McFarlane (2000)  
Arthur W. Moors (1950)  
John Wells Morss (1940)  
John Adams Paine (1967)

Winthrop D. Parker (1967)  
Annie S. Penfield (1979)  
Blanche E. Philbrick  
(Merchant E. Philbrick Fund) (1965)  
Mary N. Phillips (1974)  
J. Christie Pingree (1957)  
Carrietta W. Proverbs (1984)  
Bertha J. Richardson (1975)  
Frank L. Richardson (1975)  
Mabel Louise Riley in memory of  
Charles Edward (1972)  
Riley and Agnes Winslow Riley (1972)  
Helen S. Sharp (1966)  
Frank R. Shepard (1954)  
Anne G. Shewell (1984)  
Alice Wilder Smith in memory of  
Frank Langdon Smith (1968)  
Eleanor Smith (1986)  
Pamela M. Smith (2008)  
Francis M. Stanwood (1961)  
Albert J. Stone, Jr. (1960)  
Mary P. Stone (1948)  
Lenna R. Townsend (1952)  
Willis S. Vincent (1940)  
Clarice M. Wagner (1993)  
John M. Ward (1927)  
Madeline Cobb Webber (1973)  
Louise M. Weeks (1944)  
Arthur W. Wheelwright (1963)  
Estate of Stetson Witcher (2008)  
Joseph A. White (1979)  
Edward E. Williams (1950)  
Lizzie A. Williams (1951)

## Trusts

Margaret Shaw Allen Trust (1982)  
James R. Bancroft Trust (1983)  
Helen C. Barker Trust (1990)  
Nancy Beals Trust U/W (1984)

Reginald Benting Charitable Remainder Unitrust (2009)  
 Richard A. Berenson Family Trust 1972 (2000)  
 Nelson Bigelow Trust (1990)  
 Mabel M. Brown Trust (1991)  
 Ellen E. Carroll Trust U/W (1979)  
 Robert M. Christison Trust U/A (1984)  
 Ford H. Cooper Trust (1982)  
 Anne H. Davis Trust U/Ind (1964)  
 Gladys Dean Trust U/Dec  
 (Laurence Guild Dean Fund) (1977)  
 Paul Elliott Trust U/Agreement (1991)  
 Ruth S. Frake Trust Bequest (1981)  
 Carrie A. Hartley Trust U/Ind (1963)  
 Helen P. Hennessey Trust (1984)

Ada H. and Clara Hersey Trust U/Ind (1955)  
 Elizabeth D. Herteli Trust (2003)  
 Vladimir N. Herteli Trust (2003)  
 George L. Hill Trust (2002)  
 Mark Hyman, Jr. Insurance Trust (1999)  
 Cyril H. Jones Trust U/Ind (1974)  
 Pauline Kleven 1988 Trust (1990)  
 Aimee Lamb Trust U/Ind in memory of  
 Winthrop and Aimee Sargent (1980)  
 Barbara Estabrook Livermore Trust (1982)  
 Cora E. MacKenzie Trust U/Ind  
 (Cora E. MacKenzie Fund) (1973)  
 Adalaide Sargent Mason Trust (1982)  
 Phyllis McGillicuddy Trust (1993)

Ethel Fay McGuire Trust U/Ind (1973)  
 David D. Moir Revocable Trust (1992)  
 Gertrude Morrison Trust U/Ind (1965)  
 Hetty R. Phillips 1974 Trust (1980)  
 Robert O. Preyer Charitable Lead Unitrust (1992)  
 Esther Frances Quinn Trust (1995)  
 Harriet Rogers Unitrust (1990)  
 Florence M. Scott Trust U/W (1971)  
 George F. Shadwell Trust (1990)  
 J. de Vere Simmons Trust (1985)  
 Edson B. Smith Trust U/A (1984)  
 Irene C. Smith Trust U/A (1975)  
 Florence Snelling Trust (2006)  
 Spaulding-Potter Charitable Trusts (1972)  
 Margaret Castle Tozzer Trust U/Ind (1978)

## Named Funds and Field of Interest Funds

The following funds are either totally unrestricted or directed to a particular issue or area of concern.

Many of these funds were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them.

The year the fund was established is listed in parentheses.

Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics  
 Emily Tuckerman Allen Fund (2006)  
 Anonymous Fund (1987) unrestricted  
 Edith M. Ashley Fund (1960) primarily for the aid of blind and crippled persons  
 Geno A. Ballotti Fund (1984) unrestricted  
 Irene W. Bancroft Fund (1997) unrestricted  
 Harriett M. Bartlett Fund (1987) unrestricted  
 Diane Heath Beever Memorial Fund (2008) to support programs that address substance abuse and/or mental illness, with a primary focus on prevention  
 J. E. Adrien Blais Fund I (1967) unrestricted except that “not more than fifty percent” of the income is to be paid to two named agencies and for research and care for the elderly  
 J. E. Adrien Blais Fund II (1967) for the relief, support or assistance of poor or needy Massachusetts residents

J. E. Adrien Blais Fund III (1967) for the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease  
 Boston Foundation Arts Fund (1997) for the Boston Foundation’s Arts Initiative  
 Edith Allanbrook Fund (2002) to provide for children with extraordinary promise in the area of the arts  
 Anna Faith Jones Arts Fund (2000) part of the Boston Foundation’s Arts Fund, recognizing and honoring the leadership and service of Anna Faith Jones and her special commitment to supporting the arts  
 Edward Hyde Cox Fund (2000) for support of programs involving classical music, painting and/or sculpture  
 MassDevelopment Arts Fund for Community and Economic Development (2003) A sub-fund of the Boston Foundation Arts Fund, was established by MassDevelopment to make grants to arts, cultural and community-based nonprofit organizations conducting arts and cultural development projects or studies

- Stephen and Sybil Stone Arts Fund (2003) to support programs and organizations that provide residents, especially youth and young adults who do not otherwise have the means for involvement, with opportunities to attend and participate in the arts
- Brother Thomas Fund (2007) Dedicated to the support of organizations and activities that benefit, support, encourage or celebrate struggling artists working in any and all media in the Greater Boston area
- Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund
- Boston Parks Access Fund (2002) distributions of income will be made on a quarterly basis to the Boston Parks Department or the Arnold Arboretum of Harvard or to the administrators of other public park land within the City of Boston boundaries
- Franklin S. & Cynthia B. Browning Fund (1988)
- Emily Budd Fund (1960) for fresh air vacations for under-privileged children
- Camping Associates of Roslindale & Milton Fund (1981) for camping programs in the Greater Boston area
- Community Organizing & Advocacy Endowment Fund (1988) to support low-income neighborhood grassroots organizing and advocacy focused on institutional change
- Coolidge Christian Education Fund (1993) for Christian scholarship and the promotion of Christian values among young people through education and music
- Curtis International Council Fund (2000) to promote international peace and understanding and to foster cooperation and increase communication among diverse organizations in the Boston metropolitan area active in the field of international relations
- David W. Cushing Fund (1987) for charitable work as shall assist young people, particularly women
- Frank B. & Watson G. Cutter Fund (1984) unrestricted
- Mabel Walsh Danforth Fund (1949) for education, assistance or relief of crippled children
- James Dean Fund (1946) unrestricted but with preference for projects of maritime nature
- Virginia Herrick Deknatel Fund for Children's Services (2001) to be used for children's services
- Major Arthur M. Diggles Foundation Fund (1993) to aid Mass. disabled and sick soldiers, sailors and women who have been in the US military, naval or nursing services during any war or to aid any Mass. hospital or institution to care for these individuals
- Annie S. Dillaway Fund (1965) primarily to promote the welfare of boys and girls and young people
- Katherine E. Dooley Fund (1997) unrestricted
- East Boston Chelsea Environmental Fund (2005) for projects, programs and organizations in Chelsea or East Boston, Massachusetts
- Kate Ellis Fund (1953) for convalescents, children, blind and deaf persons, and homes for Protestant aged men and women
- Ruby C. Emerson Fund (1966) for the college education of young people of the Protestant denomination
- Mary C. Farr Arts Fund (2005) for the enhancement of cultural affairs in Boston such as support for the Boston Ballet, for scholarships for needy residents and for support of needy residents of Boston
- Herbert and Lucy Fields Fund (2008)
- Frederika Home Fund (1979) for the benefit and welfare of elderly men and women, and for research into the care of elderly
- Fund for the Environment (formerly the Fund for the Preservation of Wildlife and Natural Areas) (1994)
- Allyn Cox Fund for Essex County Greenbelt (1994) for the benefit of the Essex County Greenbelt Association
- Herbert Farnsworth Fund (1994)
- New England Forestry Foundation Fund (1996) for the New England Forestry Foundation to aid conservation of forest land in New England
- Gaywest Farm Fund (1994) for the benefit of Capen Hill Nature Sanctuary in Charlton, Massachusetts
- General Fund for Preservation of Wildlife and Natural Areas (1994)
- Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society
- Hollis D. Leverett Memorial Fund (1994) For planting and upkeep of trees, shrubs and other plants which promote and encourage bird life; primarily on land in New England owned or controlled by conservation organizations
- Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts
- General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Boston Public Schools Foundation, Inc.
- Edward Glines Fund (1938) unrestricted
- Haiti Relief and Reconstruction Fund (2010)
- Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2009)

*continued on page 70*



*Above: Haitian children displaying their indomitable spirit in a photo by Miguel Samper of Mercy Corps. Jim Ansara (bottom left) was on the ground in Haiti four days after the earthquake, while Karen Keating Ansara stayed in Boston to launch and build the Haiti Fund.*

# The Haiti Fund

## A Field of Interest Fund at the Boston Foundation

This year, in swift response to the devastating earthquake in Haiti on January 12th, Boston Foundation donors Jim Ansara and Karen Keating Ansara joined with the Board of the Boston Foundation to launch the Haiti Fund as a Field of Interest Fund at the Boston Foundation. The Ansaras, who make grants to programs here and abroad through their Donor Advised Fund, announced their intention to match contributions to the fund, dollar for dollar, up to the first \$1 million. Since then, more than 1,300 people—from school children to entire families to sports teams and places of worship—have contributed some \$2.15 million to the Haiti Fund.

In the week following the earthquake, the Boston Foundation held a major forum that brought together members of Boston's Haitian community—the third largest in the United States—as well as other donors, doctors, officials and concerned citizens. With Jim Ansara working alongside doctors from Partners in Health in Port-au-Prince, Karen Keating Ansara represented the couple at the forum, calling the Boston Foundation a “first responder philanthropist” to the earthquake.

“Helping Haitians Rebuild” is the motto of the fund, which will be spent down over the next five years, with some \$400,000 already granted to relief and reconstruction efforts. By focusing on strengthening rural economies and improving infrastructure in areas like education and housing, the goal is to build the long-term viability of communities outside of Port-au-Prince. In addition, the Haiti Fund

is aiding hard hit Haitian Americans in our community as they reach out to shelter and support relatives.

With a growing concern throughout the world about misguided disaster aid that only deepens dependency, the fund's founders are committed to working with grassroots organizations to ensure that ordinary citizens have a voice in the reconstruction and revitalization of Haiti. To fulfill this commitment, the fund endorses the *Five Principles for Reconstruction* developed at a conference co-sponsored by the Haiti Fund in March, called *Haitians Building Haiti: Towards Transparent and Accountable Development*.

“We are committed to promoting a paradigm shift in the way that resources are offered to Haiti and managed by Haitians themselves,” says Karen Keating Ansara. “As we approach the one-year anniversary of the earthquake, there is cautious hope that we can help Haitians rebuild in a way that is guided by the Haitian people, while being supported and assisted by people throughout the world. Haitians have come together, as they have so many times before, in the face of disasters. Still, there is far too much suffering. We are so proud of our brothers and sisters there and of the people of Greater Boston who have responded so generously to their plight.”

*See page 66 for a list of all Field of Interest Funds at the Boston Foundation.*

## Named Funds and Field of Interest Funds *continued from page 67*

Charles W. Hapgood Trust Fund (1986) 40% of income received for educational purposes at the Massachusetts Institute of Technology or some similar institution, or for the promotion of health and the alleviation of suffering at Massachusetts General Hospital or some similar institution

Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the homeless

Mary Harris Fund (1940) for widows and single women in straitened circumstances

Grace L. Holland Fund (2007) To assist in the rehabilitation of handicapped children

Theodore C. Hollander Trust Fund (1929) income to be used "in part" for hospitals, education and the improvement of American citizenship

Nathaniel Hooper Fund (1938) unrestricted

Grace A. Jacobs Fund (1988) unrestricted

Jacoby Club of Boston Fund (1984) to provide kindly, personal help and concern for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances

Jamaica Plain Dispensary Fund (1962) for the benefit of poor people in or near Jamaica Plain, particularly for health related needs

Charles Frederick Joy and Dora Marie Joy Fund (1992) income to be used for summer vacations for two worthy Protestant girls and one boy and any excess income shall be used to help in the care of sick Protestant children or Protestant girls or women

Kevin Kelly Fund for the Performing Arts (1994) for the Boston Foundation's Arts Initiative

Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2006) unrestricted

Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis

Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye

Azad & Doris Maranjian Charitable Trust Fund (2009) to be used for organizations committed to maintaining the physical health of the general population as well as targeted populations of the disabled; for cultural and educational enrichment; for those dedicated to preserving and defending the Constitution; and the Azad and Doris Maranjian Humanitarian Award given to any outstanding individual who has demonstrated an ability to further ennoble the human species and the human spirit

Massachusetts Civic League Fund (1983) to promote sound government

Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes

Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women

Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease

Grace G. North Fund (1954) for aid to needy gentlewomen

Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) to be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care

Norman Everett Pearl Fund (1996) for recognized charities in the Boston area

Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, nonprofit radio and television stations) providing musical programs

Permanent Fund for Boston (1980) unrestricted

Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River

Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music

David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children

Ruth M. Reiss Memorial Fund (1997) unrestricted

Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea

Harriet Rogers Fund (1990)

Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind

Walter J. & Marjorie B. Salmon Fund (1999) unrestricted

Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children

Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people

Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs designed to bring about improvements in adoption procedures

Sophia Snow Fund (1948) for care and support of destitute children of Roxbury

Starr Foundation Fund (1985) to alleviate the sufferings of the truly needy in the Greater Boston area in terms of food, clothing and shelter

Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions

Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women

Carroll J. Swan Memorial Fund for Children's Charities (1935) for summer vacations for needy children of Greater Boston

Robert Wadsworth Fund for the Future of Boston (2008)

Abraham & Esther Walerstein Fund (1981) for the support of the elderly

Nelson E. Weeks Fund (1937) for alleviation of suffering in Boston hospitals

Fanny Wharton Fund (1919) for the relief of sick young women and children

Katherine C. Wheeler Fund (1987) to increase knowledge of good government and for the encouragement of good citizenship

Arthur L. Williston and Irene S. Williston Trust For Education (1953) to provide assistance, educational aid and training at institutions other than usual four year colleges

Mary Denny Williston Fund (1969) for summer camp vacations for children; for work with alcoholics

Window Shop Fund (1988) (Marion Gordon Bever Memorial Fund) to provide educational aid including but not limited to the ACCESS Program and other assistance for refugees and foreign born residents of the United States

Gladys W. Yetton Fund (1969) for widows and single women in straitened circumstances

## Special Initiative Funds

The Boston Foundation holds a number of funds that support special initiatives—designed to respond to some of the most pressing challenges facing our community in innovative ways. The year the fund was established is listed in parentheses.

Achieving the Dream Initiative Fund (2007) a multiyear national initiative created to strengthen the ability of community colleges to help students of color and low-income students earn degrees and certificates by using data to close achievement gaps

Action Fund (2010) for unsolicited support of programmatic opportunities or challenges that advance Boston Foundation goals and objectives

After School for All Partnership Fund (2003) for the Foundation's After School Initiative

Allied Health Fund (2010) for the Allied Health Worker Initiative

Arts Capitalization Technical Assistance Fund (2010)

Boston Community AIDS Partnership Fund (1993) for prevention programs which target high-risk populations in Greater Boston—specifically communities of color

Boston Indicators of Change, Progress and Sustainability Project (1998) to examine Boston's strengths and challenges that impact the quality of life of people who live and work in the City of Boston

Catalyst Fund for Nonprofits (2009)

CHAMPS Boston (2009)

College Success Fund (2008) for the success of the Boston initiative

Civic Engagement Project Fund (2002) to increase nonpartisan voter registration and mobilization in low-income communities and communities of color with low rates of voter participation

Civic Leadership Fund at The Boston Foundation (2002) Fund designed to raise outside contributions in support of annual expenses associated with TBF's expanded role as convener and host of major community forums which promote the civic health of our region

English for New Bostonians Fund Phase III Fund (2008) for support of meeting the ESOL Demand program

Fund for Racial Justice Innovation (2003) to strengthen partnerships between community-based organizations and lawyers that use legal tools to advance equity resource distribution for communities or groups marginalized by race, color, ethnicity or immigration status

High Risk Youth Fund (2007) to build the capacity of Boston-area youth-serving networks and their member organizations to advance positive educational, social and workforce outcomes for high-risk youth through public policy action

Home Funders Fund (2002) to help increase the supply of housing affordable to families whose income is below 30 percent of the area median income

Homelessness Prevention Initiative (2005) to champion the cost-effective strategy of prevention, employing a multi-pronged approach that seeks to demonstrate the effectiveness of a spectrum of programs

Innovative Schools Initiative Fund (2010) for grants under the Foundation's Pilot Schools Initiative

Neighborhood Development Support Collaborative Fund (1993) for a Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations

Neighborhood Preservation Initiative Fund (1995) for community development in East Boston

New Economy Initiative Fund (2001) for grants under the Foundation's New Economy Initiative

Polaroid Fund (1997) to help children and adults become more independent and realize their full potential as successful members of society

President's Initiative Fund (2002) to create the President's Initiative Pre-Development Program Fund

Program Related Investments Fund (1990) for program related investment loans

SkillWorks Fund (2001) a partnership between several local and national funders to focus on job training for disadvantaged job seekers

StreetSafe Boston (2010) to working in partnership with other funders to combat youth violence in the City of Boston

United Way Millennium Fund for Children and Families (1999) an endowment partnership with the Boston Foundation:

    Ansin Fund (2002) a component fund for the United Way Millennium Fund for Children and Families

    Chelsea Boys and Girls Club Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; a portion of distribution for the Chelsea Boys & Girls Club

    Connell Family Fund (2000) a component fund for the United Way Millennium Fund for Children and Families

    Carol R. & Avram J. Goldberg Fund (2002) a component fund for the United Way Millennium Fund for Children and Families

    Lawrence & Beth Greenberg Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

    Darlene & Jerry Jordan Fund for Children (2000) a component fund of the United Way Millennium Fund for Children and Families

    Margarete McNeice Fund (2001) a component fund of the United Way Millennium Fund for Children and Families

    David R. and Muriel K. Pokross Fund (2003) a component fund for the United Way Millennium Fund for Children and Families

    Schoen Family Fund (1999) a component fund of the United Way Millennium Fund for Children and Families

    Tom & Nancy Shepherd Fund (2001) a component fund of the United Way Millennium Fund for Children and Families

    State Street Foundation Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

    J.C. Tempel Fund for Children (2001) a component fund of the United Way Millennium Fund for Children and Families

    Vinik Family Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

    Peter and Pamela Voss Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; for the "Keeping Kids On Track" Program

Vision Fund (1994) for small grants to community organizations for planning, development and training

Wallace Foundation Fund (2007) to coordinate knowledge sharing activities among the Wallace Foundation Excellence Awardees in Boston

## Designated Funds

Designated Funds have been established by donors to support one or more of their favorite nonprofit organizations. Through these funds, many nonprofit institutions receive crucial annual support. The year the fund was established is listed in parentheses.

- Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston
- Lucy Kasparian Aharonian Memorial Scholarship Fund (2007) for scholarship awards to the Armenian International Women's Association, Inc.
- Rae and Aaron Alberts Foundation Fund (2002) to be distributed annually in equal amounts to: the Carroll Center for the Blind, the Perkins School for the Blind, the Vinfen Corporation, the Jewish Family and Children's Services, and the New England Sinai Hospital
- Rae and Aaron Alberts Foundation Fund II (2005) to be distributed annually in equal amounts to the Salvation Army, the American Kidney Fund, the American Cancer Society, Children's Hospital of Boston, Massachusetts General Hospital, Combined Jewish Philanthropies of Boston, and the Massachusetts Special Olympics Association
- Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Foundation
- Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals
- Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs
- Arts Awareness Fund (2005) to connect visual artists to opportunities to serve our community's social service agencies and other constituencies
- Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston
- Lilian G. Bates Fund (1951) for three named agencies
- Be the Change Fund (2007)
- Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts
- Boston Ballet – E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet
- Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association
- Boston Baroque Fund (2003) for general operating support of Boston Baroque
- Boston Lesbian & Gay Communities Funding Partnership Fund (1994) for efforts to plan and implement a process to address gay and lesbian issues on an ongoing basis within the Greater Boston area
- Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.
- Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings
- Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College
- ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation
- BPE/Current Use Fund (1985) for current use project funding
- BPE/Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation
- MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation
- BPE/Public Education Fund (1985) for staff salaries of the Boston Plan for Excellence in the Public Schools
- BPE/Support for Early Educational Development Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation, Inc.
- Herbert Brandshaft Scholarship Fund (2007) to support the Herbert Brandshaft Scholarships at the MATCH School to help deserving students from low-income families pursue a college degree in the fields of mathematics, science, engineering or computer science
- Annie L. Breckenridge Trust Fund (2000) for the benefit of the Massachusetts Society for the Prevention of Cruelty to Animals and the Mary Lane Hospital Association
- Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition
- Charles T. Burke Fund for the Watertown Boys and Girls Club (1994) for the Boys and Girls Club of Watertown, Inc.
- Charles T. Burke Fund for the Watertown Free Public Library (1994) for the Watertown Free Public Library

Agnes T. Carruth Fund (1983) To the Kind Edward VII Memorial Hospital, to be used in whatever manner the governing body of said hospital shall see fit, but preferably for the care and treatment of persons suffering from asthma

James F. Casey Fund (1949) for seven named agencies

Alex Castotdi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students

Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose

Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy

Philip P. Chase Fund (1955) for five named agencies

Julia Child Fund (1979) for fellowships to support professional study, research, writing and teaching related to food, wine and the culinary disciplines, with preference to those planning to study in France

Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted

English High School Class of 1934 Award Fund (1994) for a scholarship to a Boston English High School student with preference given to students who show marked improvement and particularly those who are succeeding in spite of adverse circumstances

English High School – John Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School

Ernest & Vera Clivio Charitable Memorial Fund (1981) for the benefit of two named agencies

Elizabeth Cook ACF Student Fund (1997) to provide short-term funds to students associated with the Ad Club Foundation

Almon B. Cook-Relief Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester

Thomas G. Curtin – Bobby Kargula Nanae Fund (2009) to promote cultural and educational exchange programs to support the sister city relationship between Concord, Massachusetts, U.S.A. and Nanae Town, Hokkaido, Japan

Dedham Choral Society Endowment Fund (1991) (including the Brian Jones Fund) for the Dedham Choral Society, Inc.

Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra concert series to young people in the New England area

Duggan Charity Fund (1998) for Canton High School

East Boston Social Centers, Inc. Fund (1996) for the East Boston Social Centers, Inc.

Douglas A. Eaton Memorial Fund (1962) for scholarships to members of the graduating class of Hingham High School

Michael Eliot Fund for the Arts (1992) To provide scholarships & fellowships for students of the fine arts with preference to those studying in the field of sculpture.

Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008) to support the Gustavus John Esselen Award for Chemistry in the Public Interest as outlined in the organizational by-laws of the Northeastern Section of the American Chemical Society, Inc.

Adele Q. Ervin Fund (1984)

Philip M. Fagan Family Fund (1971) for Combined Jewish Philanthropies of Greater Boston

Paul R. & Jacqueline D. Fehrenbach Family Fund (1999) for Junior Achievement of Eastern Massachusetts

Benjamin M. Feinberg Fund (1962) for Hebrew College

Arthur Fiedler Esplanade Concerts Fund (1980) for the support of free concerts on the Esplanade

Food and Fuel Fund (2008)

Felix Fox Memorial Fund (1974) for the Community Music Center of Boston

Americo Francisco Fund, Estate & Realty/Charitable Trusts (1998) for the benefit of thirty named charities

Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy

John & Ethel Goldberg Fund I (1984) for the benefit of Brandeis University and West End House, Inc.

John & Ethel Goldberg Fund IV (1984) for support of eye retina research and related eye research technology

John & Ethel Goldberg Fund V (1984) for the continuing professional education of Massachusetts judges in subjects directly pertinent to the performance of their judicial and administrative duties

John & Ethel Goldberg Fund VI (1984) for Suffolk University Law School for the “needs of the law school with respect to scholarship and maintenance or renovations to the buildings housing the law school”

Barbara W. & Frank B. Gopen Fund (1978) for the benefit of Massachusetts General Hospital and the Arthritis Foundation

Walter W. Gove Fund (1972) for two named agencies

Elizabeth Grant Fund (1980) for five named agencies

Greatrex Scholarship Fund (1988) for scholarship awards to Foxborough Massachusetts students who are in need of financial aid to attend college, trade school or nursing hospital

Rosario Fajardo Hagan Fund (1991) for the Life Experience School

John H. Hagopian Fund (2005)

Patricia Jellinek Hollowell Fund (1992) for support of the Patricia Jellinek Hollowell Scholarship Fund at the Museum School, Museum of Fine Arts

Hastings-Plummer Fund (1940) for Crittenton Hastings House of the Florence Crittenton League, in part for special purposes

Benjamin Patrick Hermann Fund (2002) for the New England Conservatory's efforts to recruit accomplished cellists to teach cello master classes in the extension division

Jorge N. Hernandez Fund (1987) for support of the Jorge N. Hernandez Cultural Center

Gertrude Hooper Fund (1996) for benefit of the Crime and Justice Foundation

Madeleine C. Huiginn Fund (1993) income to be added annually to principal

Blanche Hyslop Fund (1982) to three named agencies

Orchestra of Indian Hill Music Director Fund (2002) Annual distributions will be made to the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra's conductors's chair (\$30,000 per year until the fund is depleted)

James W. & Margaret A. Ingraham Charitable Fund (1992) for the benefit of five named agencies

Ella Jackson Artists and Scholars Fund (1982) for the Truro Center for the Arts on Castle Hill

Patrick F. Jones, Jr. Endowment Fund (1981) for the benefit of the Lena Park Community Development Project

Donaldson F. Jones Fund (1999) for the benefit of Massachusetts General Hospital / The Claude E. Welch Surgical Research and Education Fund

William & Sean Kelley Scholarship Fund (2010)

Kellogg Foundation Fund for ROCA (2006) a matching fund for ROCA

John F. Kennedy Library Foundation Endowment Fund (1984) for support of the John F. Kennedy Library Foundation

Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School

Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA

Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society

Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)

Gerald V. Levreault & Claire H. Levreault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England

Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine

Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation

Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts

John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution

Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency. Currently the program is the "Short Stop" of Somerville, MA

Harry D. Neary Fund (1950) for five named agencies

Neighborhood Development Support Collaborative Fund (1987) for Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations

New England Aquarium Education Fund (1983) (Robert G. Stone Fund, Paul F. Hellmuth Fund, Helen B. Spaulding Fund, and the William S. Brewster Fund) to support educational programs at the New England Aquarium

New England Women's Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women's Club Memorial Lecture Series, devoted to the discussion and study of women's history in Boston

Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science's Internship Program

Nixon Peabody Scholarship Fund in Recognition of Retired Managing Partners (1997) for scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs

Oak Foundation – Home Funders Fund (2007)

Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school

Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts

Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library

William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning

Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center's Scholarship Program

Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post secondary vocational education

Charles & Cornelia Pfaff Fund (1964) for four named hospitals

Emma K. & Richard Pigeon Fund (1955) half of income for three named agencies on Cape Cod and half unrestricted

Pipeline to Public Service Fund/Initiative for Diversity in Civic Leadership (2006)

Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors

Pooled Income Administrative Fund (1988) from the Lilly Endowment, Rockefeller Brother's Fund and State Street Bank & Trust Company. For the administration of the Planned Giving Partnership

Primary Care Fellowship Program Fund (1983) to support Harvard Medical School's program of preparing general internists for academic careers

Charlotte F. & Irving W. Rabb Family Fund (1984) for Boston Symphony Orchestra youth programs

Katharine Rayner Fund for the New York Public Library (2009) To support the New York Public Library Astor Lenox and Tilden Foundations

Reading Visiting Nurse Association Fund (1976) for the Combined Visiting Nurse Association of North Reading, Stoneham, Wakefield and Woburn, Inc. for its work in Reading

Rogers Fund of the Riverside Cemetery (1997) to preserve and maintain the Rogers Mausoleum structures and grounds at the Riverside Cemetery in Fairhaven, Massachusetts

Henry A. Root Fund (1926) for the Service Pension Society of the Unitarian Universalist Association

Rose Fund (1981) for the Carol Rabb Goldberg Seminars for Urban Problems at Tufts University

Fund for Rosie's Place (1984) to benefit Rosie's Place

Bessie H. Short Fund (1997) for the benefit of elderly residents of the Town of Wrentham, Massachusetts

Dana P. & Maude E. Simpson Memorial Fund (1998) half of the income for seven named agencies and the other half unrestricted

Muriel & Otto Snowden Endowment Fund (1984) endowment fund for Freedom House

Social Law Library Endowment Fund (1982) for the support of various library programs

Michael Spock Community Service Fund (1980) for support of the Children's Museum outreach services for the Boston community

Alison L. Stevens Fund (1976) for two named agencies

Miriam & Sidney Stoneman Fund (1984) to benefit Boston Symphony Orchestra youth activities

Surfmen's Trust Fund (1977) for the Coast Guard Mutual Assistance Fund

Surkin Endowment Fund (1981) for support of the various projects of the Boston Center for the Arts

Margaretta Taylor Animal Medical Center Fund (2009) for the Animal Medical Center

Margaretta Taylor Fund for Brooks School (2009) for the Brooks School

Margaretta Taylor Eaglebrook School Fund (2009) for the Eaglebrook School

Agnes & Lewis Taylor Fund (1962) for the Orleans United Methodist Church in Orleans, Massachusetts

Frank B. Thayer Fund (1976) for three named agencies, but one-fourth of the income unrestricted

Pauline Toumpouras Fund (2010) AMB to benefit the Greek Orthodox Chapel and Center, Brookline, MA

Robert E. Wallace Memorial Fund of the Urban League (1992) to support professional development activities of the Urban League of Eastern Massachusetts, emphasizing programs for youth and education

Wallace Foundation Fund (2006)

Bradford Washburn Fund (1980) for support of community services of the Museum of Science

Bill and Estelle Watters Fund (1997) for three named agencies

George & Judy Webb Fund (1986) to benefit Princeton University and Phillips Academy

Jane Wengren Fund (1979) for the benefit of the Center for International Visitors of Greater Boston

Stetson Whitcher Fund (1986) to benefit eight named agencies

Ernesto "Tito" Whittington Scholarship Fund (2007)

May J. Wikstrom Fund (1998) to support eye retina research

Rudolph & Sara Wyner Prize Fund (1985) to the New Israel Fund for a prize award (paid every fifth year) to an organization that has made a significant and positive contribution to mutual cooperation and reconciliation among Arabs and Jews in Israel

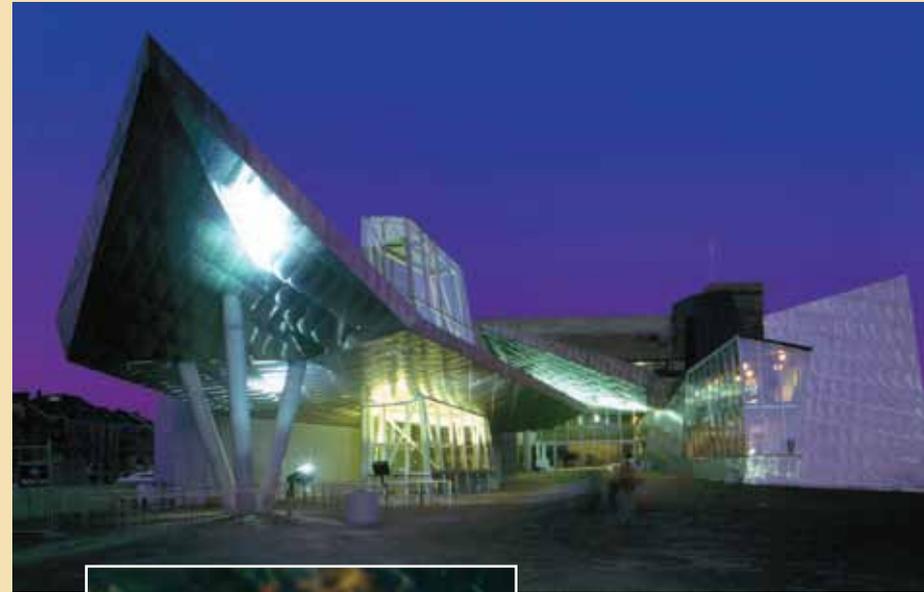
# The New England Aquarium Fund

## A Designated Fund at the Boston Foundation

When the New England Aquarium broke ground on Boston's Central Wharf 45 years ago, the dream was to create the nation's first large-scale modern aquarium, but its rugged waterfront location was considered a serious drawback by skeptical investors. Funding was hard to come by until the Boston Foundation stepped up with a \$100,000 grant, a large commitment at the time and a powerful endorsement for the project. In 1969, the Aquarium opened to an elated and fascinated public.

The Foundation played another key role in the story of the Aquarium when a Designated Fund was established in 1983 to provide annual support to the Aquarium's educational programs. Since then, more than \$5 million has gone to the Aquarium from the Boston Foundation fund, today helping to support educational experiences for the 1.3 million people who visit the Aquarium each year and some 100,000 children who participate in programs on site and in their communities.

In recent years, the Aquarium has become a global leader in ocean exploration and marine conservation. And its innovative exhibits and educational programs aim to create the next generation of ocean protectors. "We are redefining what it means to be an aquarium," says its President and CEO Bud Ris. "Our vision is to combine education with entertainment and compelling immediate experiences—all with the ultimate goal of addressing the tremendous challenges facing the world's oceans." And today, of course, the Aquarium's waterfront location, once considered a serious drawback, is one of the institution's major assets.



*The Boston Foundation was "there at the beginning" for the New England Aquarium, providing a grant of \$100,000 to the new venture in 1965—an unusually large grant for the Foundation at the time and an important endorsement for the founders.*

*See page 73 for a list of all Designated Funds at the Boston Foundation.*

## Donor Advised Funds

The following is a list of all Donor Advised Funds established by individuals, families and companies choosing to be actively involved in the grantmaking process. The year the fund was established is listed in parentheses.

63 Marlborough Street Fund (1984)  
AADS Memorial Fund (2004)  
Walter and Alice Abrams Family Fund (2005)  
Maida & George Abrams Fund (1985)  
Abromowitz/Ruttenberg Family Fund (2000)  
Acacia Fund (2004)  
Ad Club Foundation Fund (1987)  
Adler Family Fund (2006)  
Adlib Foundation (2010)  
Adopt-A-Statue Endowment Fund (1988)  
Affinity Services Corporation Fund (2003)  
Richard and Kimberlee Alemian Fund (1996)  
Aley Fund (2009)  
Aliad Fund (1993)  
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)  
Rosamond W. Allen Charitable Fund (2004)  
Dwight & Stella Allison Fund (1982)  
Alper Family Fund (1995)  
Ames Foundation Charitable Fund (2009)  
George and Nedda Anders Fund (1991)  
Carol and Howard Anderson Family Fund (1997)  
Barbara Jane Anderson Fund (2000)  
Selma and Bayness Andrews Fund (2006)  
Michael & Ellen Angino Fund (1997)  
Anony Fund (1998)  
Ansara Family Fund (2006)  
Anthropologists' Fund for Urgent Anthropological Research (1996)  
Jim Apteker Fund (2006)  
Arba Lifnot Boker Fund (1992)  
Armony Erel Charitable Fund (2008)  
Atalaya Fund (2004)  
Atlantic Fund (1997)  
Ausschnitt Fund (2004)  
Kathryn and Charles Avison – Miriam Avison Charitable Fund (2005)  
Katharine & George Baker Fund (1987)  
Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)  
Balzer/Bellinger Fund (2007)  
John & Judith Barber Fund (2002)  
Richard Allan Barry Fund (2002)  
Baudanza Family Fund (1997)  
Baupost Group Charitable Fund (2004)  
Beachcomber Fund (2008)  
Bellevue Fund (1999)  
William D. & Mary E. Benjes Fund (1984)  
Jane Bernstein Fund (2006)  
Charlotte Saltonstall Bigham Memorial Fund (2004)  
Bird Fund (1999)  
Bitpipe Legacy Fund (2004)  
Linda Cabot Black Fund (1983)  
NICSA/William T. Blackwell Scholarship Fund (1995)  
Emmanuel and Jane Blitz Fund (1992)  
Tom and Lisa Blumenthal Family Foundation (2005)  
Joan T. Bok Fund (1997)  
Boston City Hospital Social Service Fund (1981) for medical social treatment, including rehabilitation, of needy patients of Boston Medical Center; for training costs and other costs of social work students in the Boston area  
ACCESS Scholarship Fund (1986) for ACCESS scholarships which provide “last dollar” grants to those students pursuing college who do not receive sufficient aid from other sources  
BPE/Bank of Boston 200th Anniversary Fund (1982)

Braverman Family Fund (1992)  
 Bronner Charitable Foundation (2006)  
 Peter A. Brooke Fund (1998)  
 Brooke Family Donor Advised Fund (2007)  
 Peter W. and Ruth H. Brooke Fund (2004)  
 Dean Bullock Family Fund (1997)  
 Burden Family Charitable Fund (1999)  
 Denise A. Burgess Fund (2002)  
 Bill and Barbara Burgess Fund (2002)  
 William T. Burgin Fund (2001)  
 Ed Burrows Charitable Fund (2008)  
 John A. Butler Memorial Fund (1988)  
 Kairos Butler Fund (1994)  
 Butler's Hole Fund (1994)  
 C & K Foundation Fund (2000)  
 Norman L. Cahners Fund (1984)  
 Campbell Foundation Fund (2003)  
 A. Bruce Campbell Fund (2002)  
 Erin K. Campbell Fund (2002)  
 Michael C. Campbell Fund (2002)  
 C. Alec and Sarah O' H. Casey Charitable Fund (1993)  
 Margaret W. Casey Fund (1986)  
 Alice F. Casey Fund (2006)  
 Ellen W. Casey Fund (1993)  
 Champa Charitable Foundation Fund (2003)  
 Charlestown Fund (2008)  
 Chasin/Gilden Family Fund (2000)  
 Charles Ezekiel and Jane Garfield Cheever Fund I (2006)  
 Charles Ezekiel and Jane Garfield Cheever Fund II (2006)  
 Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative  
 Joyce Chen and Helen Chen Foundation Fund (1995)  
 Chertavian Family Fund (2005)  
 Chevron Fund (1980)  
 Christ on Earth Fund (1989)  
 Michael W. Christian Memorial Fund (1986)  
 Dr. & Mrs. B.U. Chung Fund (1999)  
 Chung Family Fund (1999)  
 Churchill Family Fund (1997)  
 Circle Fund (1997) priority given to organizations which support grassroots organizing for social change  
 Civic Engagement Fund (2010)  
 CJE Foundation Fund (2007)  
 Clarke Fund (1987)  
 Cohen/Lucas Fund (1999)  
 Coit Family Fund A (2001)  
 Colby Charitable Fund (1980)  
 Colony Road Fund (1997)  
 Commonwealth Rinks Fund (1991)  
 Condor Street Fund (1988)  
 Constance and Lewis Counts Fund (1990)  
 Joette & John Cook Fund (1986)  
 Coolidge Family Fund (1982)  
 Cooper Leeser Family Fund (1997)  
 William & Susan Copeland Fund (1990)  
 Corvelli Fund (1996)  
 George D. & Angelyn K. Coupounas Fund (1994)  
 Demetrios G. C. & Kimberly A. Coupounas Fund (1996)  
 Jessie B. Cox CLT – Cox Family Fund (2009)  
 Jessie B. Cox Charitable Trust Fund (2008)  
 Elizabeth Deming Coxe Fund (1995)  
 Cregan Charitable Fund (2005)  
 Crosby Family Fund (2000)  
 Kate Crozier Fund (2007)  
 Tarrant and Laura Cutler Charitable Gift Fund (2008)  
 Dainger Fund (1997)  
 Darling Family Fund (1983)  
 John Da Silva Memorial Fund (1988)

John H. Deknatel Family Fund (2009)  
W. Deknatel Charitable Fund (2009)  
Sarah Derby and Gary MacDonald (2007)  
Marshall and Laura Derby Charitable Fund (2007)  
Rebecca Derby and Evan Morton (2007)  
DeWolfe Family Fund (2000)  
Larry DiCara Fund (2006)  
Dillon Fund (2004)  
Dintersmith-Hazard Foundation Fund (2006)  
Diversity Training Fund (2010)  
Dodson Family Charitable Fund (2007)  
Elizabeth Dodson Gray Fund (2010)  
Doe Noordzij Fund (2001)  
Eugene B. & Nina L. Doggett Charitable Fund (1999)  
Donor Co-Investment Fund (2004)  
Douglas Drane Family Fund (1984)  
Drane Center Fund (2002)  
Margaret Eagle Foundation Fund (2000)  
Echo Rock Fund (2000)  
A & E Educational Quest Fund (2004)  
Egozy Fund (2006)  
Eisenson Family Fund (2005)  
Ellis Family Fund (2003)  
Boston Foundation Employee Matching Gifts Fund (2007)  
Employment Retention Fund (2004)  
Endowment for Children in Crisis (1991)  
Gerald Entine Family Trust Fund (2008)  
EqualLogic Foundation Fund (2008)  
Ethics Trust Fund (1993)  
Evans Family Fund (1999)  
Norris & Constance Evans Charitable Fund (1999)  
Eagle Bank-Frank E. Woodward Scholarship Fund (1985) for scholarships for  
Everett residents  
Excalibur Fund (1999)  
Peter and Ellen Fallon Fund (1997)

FARM Fund (2006)  
Martin & Kathleen Feldstein Fund (1986)  
Ferdinand Fund (2000)  
Fine Family Foundation Fund (2002)  
First Principle Fund (2006)  
Fisher Family Fund (2000)  
Fishreys Family Philanthropic Fund (1999)  
Jack Florey Fund (2004)  
Forshey Family Fund (1997) to provide opportunities for enhancing the  
quality of life for children and families  
Freeman/Kelly Family Fund (2005)  
Niki & Alan Friedberg Fund (1986)  
Orrie M. Friedman Charitable Fund (1995)  
David Frisbie Family Charitable Fund (2010)  
FUEL Accounts Fund (2009)  
Fulkerson Family Fund (1998)  
Davis R. Fulkerson Fund (1999)  
Lyle W. Fulkerson Fund (1999)  
Sarah Fulkerson and Robert Le Roy Family Fund (1999)  
Fuller Trust, Inc. Fund (2009)  
Fulton Family Fund (2006)  
Future Fund (2006)  
Gabrieli Family Fund (1997)  
Gaffney/Kames Foundation Fund (1997)  
Galilean Fund (2008)  
Ganesh Fund (2001)  
Gannon Family Charitable Fund (2003)  
Gannon Family S.U.N. Fund (2010)  
John Lowell Gardner Fund (1986)  
Dave Garroway Fund (1982)  
Garuda Fund (2007)  
Brad Gatlin Family Fund (1995)  
Gaudette Family Fund (2000)  
Gergen Family Fund (2009)  
Congressman Gerry E. Studds Fund (2006)

Carl J. Gilbert Fund (1984)  
 Gilbert Fund (2007)  
 Glassman Family Fund (1985)  
 John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine  
 Carol R. & Avram J. Goldberg Fund (1983)  
 Golden Family Fund (2000)  
 Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)  
 Goodworks Fund (2002)  
 Gordon Educational Fund (2001)  
 Sandra & Philip Gordon Family Foundation Fund (2001)  
 Gordon Weil, Jr. Fund (2010)  
 Laurie Gould and Stephen Ansolabehere Fund (2009)  
 Gravelley Springs Fund (2005)  
 Patricia H. Gross Fund (1999)  
 Grunebaum Charitable Fund (2006)  
 Gualala Fund (1991)  
 Guenzel-Pieters Family Fund (2008)  
 Charles & Dorothy Gullickson Fund for Social Change (1998)  
 Mary Haas and Ronald Leavitt Donor Advised Fund (2001)  
 Jay Habegger and Christine Nagle Fund (2004)  
 Ken and Becky Hansberry Fund (2001)  
 George Harrington Trust Fund (1983)  
 Charlotte C. Hart Family Fund (2001)  
 J. Allan Hauter Memorial Fund (2004)  
 James E. Hayden Charitable Fund (2001)  
 Hebb Charitable Fund (2003)  
 HEIRS Fund (1996)  
 Helies Family Fund (2000)  
 Elizabeth D. Heller Fund (1987)  
 Henderson Fund (1996)  
 Fred Henning Fund (1989)  
 Henry Fund (1986)  
 E. Byron Hensley Jr. Charitable Fund (1993)  
 John P. Herrick Fund (2009)  
 William H. and Jodi A. Hess Charitable Fund (2005)  
 Hewitt Family Charitable Trust Fund (1993)  
 Ann S. Higgins Charitable Remainder Unitrust (Unrestricted) (2010)  
 Ann S. Higgins Fund (2001)  
 Lucius T. Hill III and Wendy Y. Hill Fund (2000)  
 Petie Hilsinger Fund (1999)  
 Hingham Education Foundation Fund (1995)  
 Marc Hirschmann Foundation Fund (2002)  
 Hoffman Fund (1986)  
 Robert L. Hogue Fund (1981)  
 Holberger Family Fund (1993)  
 Holland Family Fund (1993)  
 Holtzman Fund (2009)  
 Gilbert H. Hood Family Fund (1980)  
 Gilbert H. Hood Jr. Charitable Lead Trust Fund (1980)  
 Robert Hooper Family Fund (2004)  
 Hourless Fund (1997)  
 Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham  
 Hoyt Family Fund (2000)  
 Hunt Fund for Children (2001)  
 Interstitial Fund (2009)  
 Investing in the Future Fund (2000)  
 Iron Mountain Education Fund (2004)  
 J. Jill Compassion Fund (2002)  
 Mitchell & Diane Jacobs Fund (1998)  
 Jade Fund (2007)  
 JAHHELBE Fund (2002)  
 James F. Alenson Memorial Fund (2007)  
 Jochkan Charitable Fund (2001)  
 Stephen G. & Rosemarie Torres Johnson Family Fund (2000)  
 Jonas Family Fund (2000)  
 Hubie Jones Fund (2004)  
 Samuel Lamar Jordan Trust Fund (2000)

*continued on page 84*

# The Black Philanthropy Fund

## A Boston Foundation Donor Advised Fund

**T**here is a great tradition of giving in Boston's black community that is so natural and so varied that it challenges the very definition of the word "philanthropy." Over the course of more than two centuries, black philanthropy has provided for the basic needs of families, and helped to shape some of the most important social and political movements in American history. It has taken the form of scores of mutual support organizations created and run by African Americans, hundreds of black churches with missions broader than many social service agencies, and thousands of families that have raised other people's children as their own—and always had a little something to give to the people next store.

Now, there is a Black Philanthropy Fund at the Boston Foundation, inspired by this great tradition and launched by three prominent members of Greater Boston's African-American community, with the goal of attracting many more donors and building a powerful resource of financial support that will help children succeed in school. The founders of the fund include leaders from the corporate, nonprofit and academic fields.

Two of the founders are senior staff at the Efficacy Institute, a national organization which, for more than 25 years, has focused on improving and turning around schools based on the very simple belief that virtually all of our children can achieve high standards in school with the right tools and supports.

Dr. Jeffrey Howard founded the Efficacy Institute and has developed a widely-used set of training programs, consulting services and materials for adults and youth to promote the Insti-

tute's innovative model. Michele Courton Brown, Chief Operating Officer of the Efficacy Institute, brings a powerful background in philanthropic and strategic planning skills to her work.

"We decided to partner with the Boston Foundation because the Foundation understands our community and is dedicated, as we are, to equity in education," says Dr. Howard. Ms. Courton Brown adds that all three of the Black Philanthropy Fund's founders have benefited from the educational opportunities they have had in their lives. "Our goal is to support programs that offer those life-changing opportunities to everyone," she says.

Another founder of the fund is David A. Thomas, the Fitzhugh Professor of Business Administration at Harvard Business School and a recognized thought leader in the areas of strategic human resources management and organizational diversity. "Our goal for grants through the fund is to support mentoring programs and other initiatives in the early stages, when small grants can have a large impact," he says. "If we are able to do that, we will see real progress through our grantmaking and attract many other donors to join us in building this fund."

*(From left) David Thomas, Michele Courton Brown and Jeffrey Howard are three of the founders of the Fund. Other founders include Dr. Cheryl Howard, Vice President of Marketing and Admissions at Simmons College, and Valerie Moseley, Senior Vice President and Partner at Wellington Management Company.*

*See page 78 for a list of all Donor Advised Funds.*



Donor Advised Funds *continued from page 81*

Jumping Rock Fund (2000)  
Louis and Marcia Kamensky Donor Advised Fund (2010)  
Beton M. Kaneb Fund (1983)  
Albert J. & Diane E. Kaneb Family Fund II (1997)  
Patricia A. Kaneb Fund (2003)  
Martin & Wendy Kaplan Fund (2006)  
Steven E. Karol Charitable Foundation (1999)  
Kassler Family Fund (2000)  
Elizabeth and Paul Kastner Foundation Fund (2008)  
Kathryn Novotny Fund (2007)  
Stephen and Caroline Kaufer Charitable Giving Fund (2004)  
Kaye Charitable Fund (2003)  
John & Anne-Marie Keane Foundation Fund (1997)  
Kearney Family Fund (1995)  
Keewaydin Fund (2001)  
Sabina F. Kelly Catholic Charitable Fund (1991)  
Kensington Capital Children's Fund (2002)  
Keogh Family Fund (2000)  
Kidder SBSM (Strong Body, Strong Mind) Fund (2005)  
Kidder Smith Fund (2003)  
M. R. Kidder Charitable Fund (2004)  
KJN Family Fund (1997)  
Kluchman Family Fund (1997)  
Allen and Elizabeth Kluchman Fund (1997)  
Klureza Family Fund (1997)  
Pamela Kohlberg Fund (1995)  
Stephen P. Koster Fund (1985)  
Anna Krezwick Fund (2002)  
Joseph and Lisa Krivickas Family Fund (2006)  
G. Barrie Landry Fund (2005)  
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)  
Lawrence Family Fund (2009)  
Barbara Lee Family Foundation Fund (2004)

Roger & Clarissa Lee Family Fund (2009)  
Thomas E. & Barbara B. Leggat Fund (1986)  
C. Martin Leinwand Fund (1986)  
Colman & Carol Levin Fund (2000)  
Levine Family Charitable Fund (2003)  
Levitt Family Fund (2000)  
Lewis Family Fund (2007)  
Charlotte Ruth Lewis Fund (1998)  
Henry R. Lewis Family Fund (2007)  
Southard Lippincott Fund (1996)  
Lissy Family Fund (2008)  
John S. Llewellyn, Jr. Community Assistance Fund (1996)  
LMG Fund (1997)  
Marjorie L. and James M. Lober Fund (2010)  
LOC Fund (2009)  
Joan Locatelli Foley Memorial Fund A (1997)  
Joan Locatelli Foley Memorial Fund D (1997)  
GC & JW Lodge Fund (2000)  
Loomis Sayles Charitable Fund (2007)  
Lord-Buck Fund (1996)  
LPL Financial Charitable Fund (2009)  
Bruce Lunder Fund (1982)  
John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)  
Donald J. & S. Kelley MacDonald Charitable Fund (1998)  
Magic Penny Fund (1997)  
Margaret Hixon Fund (2007)  
William G. Markos Fund (1982)  
Evelyn A. Marran Fund (1983)  
Martin Fund (1998)  
Mason-Brown Fund (2008)  
Sydell and Edward I. Masterman Fund (1997)  
Match School Scholarship Fund (2007) for Match School scholarships  
Mayel Fund (1982)  
William and Linda McCabe Fund (1994)  
Richard & Judith McGinnis Fund (1999)

Eleanor P. McIntyre Fund (2001)  
 McNeill Family Fund (1997)  
 McSweeney Family Charitable Fund (2009)  
 Medical Research Fund (1992) to support medical research in the fields of  
 endocrinology and/or nuclear medicine  
 Emily & Bernard H. Mehlman Fund (2002)  
 Mellowes Fund (1998)  
 Leila Yassa & David Mendels Fund (2000)  
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)  
 Meyer Foundation (2006)  
 Allan Meyers Fund for the Advancement of Careers in Disability (2000)  
 Michon Family Fund (1986)  
 Microsoft Unlimited Potential Fund (2005)  
 Mid-Century Fund (2004)  
 J. F. Middleton Family Fund (1995)  
 Mill River Foundation Fund (2004)  
 Gabrielle J. Miller Donor Advised Fund (2004)  
 Anita L. Mishler Education Fund (1983)  
 Moccasin Brook (2000)  
 Molino Family Fund (2003)  
 Monadnock Fund (2002)  
 Moose and Squirrel Fund (2006)  
 Mormann Family Fund (2006)  
 Robert S. Morris Advised Fund (2000)  
 Sykes Moyer Fund (2005)  
 Muddy Pond Trust Fund (1994)  
 David G. Mugar Fund (1998)  
 Mullen Family Fund (2001)  
 Munger Family Fund (2001)  
 Murchison/Silvia Charitable Gift Fund (2009)  
 Mystic Harmony Fund (2000)  
 Paul F. Nagle Memorial Fund (2006)  
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)  
 Tami E. Nason & Kent A. Lage Fund (2005)  
 Jean F. and David G. Nathan Fund (1986)  
 New Beginnings/Kidder Fund (2004)  
 Next Door Fund (2005)  
 Nicholas Novotny Fund (2007)  
 North Conway Institute Fund (2001)  
 Chad & Lia Novotny Fund (2002)  
 Novotny/Ramirez Donor Advised Fund (2002)  
 Novotny/Swahnberg Fund (1997)  
 Dupre-Nunnally Charitable Gift Fund (2007)  
 O'Brien Family Fund (2006)  
 Ones Fund (2004)  
 Richard T. O'Rourke Fund (1988)  
 Orpheus Fund (2002)  
 Morgan Palmer Charitable Fund (1982)  
 John J. Pappenheimer Fund (1995)  
 Parker Family Fund (2000)  
 Field Parker Fund (1996)  
 Partnership Fund in honor of Anna Faith Jones (2001)  
 Payne's Creek Fund (2001)  
 Payson Family Fund (2000)  
 Peeler/Kellogg Fund (1999)  
 Perkins Grant Fund (1996)  
 Samuel Perkins and Nancy Reed Fund (1996)  
 Sheila and Sara Perkins Fund (1996)  
 Perkins Improvements Fund – William (1996)  
 John & Lydia Perkins Fund (1999)  
 Robert C. Perkins Fund (2000)  
 Thomas Perls Fund (2004)  
 Permanent Housing Fund (1989)  
 Roger Perry Memorial Fund (1999)  
 Peter Fund (2000)  
 Petersen Family Fund (2001)  
 Kevin Phelan Fund (2004)  
 Philancon Fund (1990)  
 Katherine A. & Fannie Phillips Fund (1997)  
 Picard Family Fund (2000)

Jamie Pierce & Rick Cresswell Fund (2002)  
 Pitts Family Fund (1997)  
 Plimpton – Shattuck Fund (2005)  
 Stephen and Sharon Plumeri Fund (1994)  
 Poler Family Charitable Gift Fund (2008)  
 Pool Family Fund (1997)  
 Poss-Kapor Family Fund (1996)  
 Pride in Scholarship Fund (1992) for scholarships to students whose academic work & individual contributions to the arts, sciences or business best serve & promote the gay & lesbian community  
 Fred & Ruthann Prifty Fund (2001)  
 Thomas & Mary Prince Family Fund (2000)  
 Project Shelter Pro-Am Fund (1991)  
 Sue and Bernie Pucker Fund (2002)  
 Donald and Frances Putnoi Charitable Fund (2006)  
 Peg Pyne Fund for Handicapped Access (1985) to make congregations accessible to handicapped worshipers  
 Quid Nunc Fund (2001)  
 Quinn-Jacobs Family Fund (1992)  
 Quinn-Jacobs Family Fund A (1992)  
 Sidney R. & Esther V. Rabb Family Fund (1983)  
 Barbara & Yale Rabin Fund (2002)  
 Radtke Family Fund (1996)  
 Richard E. & Mary F. Rafferty Fund (2006)  
 Otto W. Ramstad Fund (1998)  
 Bessye Bedrick Ravelson Fund (2003)  
 Gene Record Fund (2002)  
 Sara Delano Redmond Fund (1996)  
 Remmer-Fox Family Fund (1995)  
 Renaissance Fund (1998)  
 Reno Family Charitable Foundation (1998)  
 Edward S. Reynolds Memorial Fund (1984)  
 Riptide Fund (2002)  
 Jonathan Rizzo Memorial Foundation Fund (2001)  
 Robert L. Feinberg Fund (2007)  
 Thomas Roberts Fund (1995)  
 Roberts-Belove Fund (2004)  
 Robynhood Thanksgiving Fund (2002)  
 Rodgers Community Fund (2004)  
 Rosedune Fund (1970) especially for educational and cultural programs, primarily for children  
 Rosen Family Fund (2008)  
 Andrew L. & Leslie (George) Ross Fund (2003)  
 Daniel and Brooke Roth Charitable Gift Fund (2007)  
 Rotman-Attardo Family Fund (2005)  
 Rotten Dock Fund (1988)  
 Dr. Jordan S. Ruboy Charitable Fund (1998)  
 Rust Bowl Fund (1987) for the benefit of cultural arts, including theatre  
 Robert Sachs & Caroline Taggart Gift Fund (1998)  
 Salmon Family Charitable Fund (2006)  
 David Salten Fund (2007)  
 Risha C. and Paul A. Samuelson Fund (1982)  
 Kazanjian Sargeant Fund (1996)  
 Gary P. and Kimberley H. Savage Charitable Fund (2007)  
 Schawbel Family Fund (1995)  
 Margaret M. Schmidt and Kenneth J. Danila Fund (2004)  
 Schott Fund (1999)  
 Schumann Family Fund (2005)  
 Joel Schwartz Family Fund (2000)  
 Charles S. and Zena A. Scimeca Charitable Fund (2004)  
 Stephen Sears and John Lavryssen Fund (2009)  
 September Fund (2000)  
 Norman and Maryellen Sullivan Shachoy Fund (1997)  
 Shames/Egasti Fund (1991)  
 Shapiro/Fleishman Fund (1999)  
 Douglas Boyd Sharpe Donor Advised Fund (2006)  
 Shawkemo Fund (2000)  
 K.A. and P.R. Sherbrooke Family Fund (2007)  
 Sherman Family Foundation Fund (2005)

Jon Shevell Cancer Fund (2010) to make grants to qualified charitable organizations that are dedicated to the treatment, prevention, or research of cancer

Jon Shevell Children's Fund (2010) to make grants to qualified charitable programs that are serving orphans (defined as children and young people whose parents are deceased or unable to take care of them)

Jon Shevell Education Fund (2010) to make grants to qualified Jewish religious or educational organizations

Shields Family Fund (2006)

William U. & J.W. Shipley Fund (2001)

Shoe Box Foundation Fund (2004)

Jean Karpas Siegel Fund (1994)

John and Susan Simon Boston Foundation Fund (2007)

Ellen L. Simons Fund (1997)

Skylight Fund (2000)

Ellin Smalley Fund (1987)

Smith Family Charitable Fund (2004)

Austin & Susan Smith Fund (1999)

Timothy Smith Fund (1995)

Julian & Anita Smith Fund (1981)

J. Alper Smith Fund (1996)

Clark R. and Trina H. Smith Family Fund (1990)

Nancy and George Soule Family Fund (1997)

Sparky Foundation Fund (2003)

Spector Fund (2001)

Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund (2007)

Scott E. Squillace & Shawn M. Hartman Donor Advised Fund (2008)

David F. Squire Family Fund (1997)

Staufenbiel Aley Fund (2009)

Harvey & Shirley Stein Fund (1999)

Stewart Fund (2006)

Stone Charitable Fund (1999)

Elihu and Lillian Stone Family Charitable Fund (2003)

James M. and Cathleen D. Stone Foundation (1995)

Stonehill Enrichment Fund of the Ames Free Library (1994)

Robert Strange Family Fund (2003)

Charles Sugnet Fund (1998)

Joshua Sugnet Fund (1998)

Suhrbier Family Fund (2005)

Nancy L. Sullivan Fund (1989)

Diane Sullivan-Villano Fund (1998)

Sunrise Fund (1993)

Sylvan Fund (1985)

Davis & John I. Taylor Trust Fund (1983)

TechFoundation Fund (2002)

Tempero Family Fund (2002)

Marc C. Thompson Family Fund (2008)

Thomsen Family Fund (2000)

Susan and Michael Thonis Fund (2005)

Thorvale Fund (2007)

Scott and Jennifer Tobin Charitable Fund (2004)

Topol Family Fund (1991)

Norman E. & Sandra Curry Toy Fund (1985)

Tracy Stewart Fund (2009)

Trefler Fund (1997)

Elizabeth Trichel Joyce Family Fund (2007)

Tye Charitable Fund (2006)

Unity Foundation Fund (1995) for funding of nonprofit organizations serving the African-American community

Valette Family Charitable Fund (2001)

Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter

Nancy J. Vickers Fund (2006)

Villers Fund (1997) to support the Community Catalyst program

Vizzini Fund (1997)

M. Volpe Kluchman Fund (2005)

Ann & Robert von der Lippe Fund (1997)

JH & EV Wade Fund (1990)

James and Margaret Wade Fund (1997)

Wainwright Bank Community Fund (1998)  
S & D Walden Charitable Fund (1986)  
Walker Fund (1998)  
Walsh Brothers Foundation (2010)  
Ruth & Henry Walter Fund (1982)  
J. H. Walton Family Fund (1986)  
Max Warburg Fund (1992)  
John William Ward Fund (1987)  
Warner Charitable Gift Fund (2000)  
Joseph D. Warren Fund (2010)  
Wasserman Fund (Terminated Fund) (1986)  
Waterfield Fund (2002)  
Mimi Chandler Watt Fund (2008)  
Weiss Charitable Fund (2004)  
Wellesley Hills Congregational Church Outreach Fund (2007)  
Lois & David Weltman Fund (1991)  
Frank & Jean White Fund (2001)  
Janet White Memorial Scholarship Fund (2004)  
Whitehead – Sayare Fund (2008)  
Whittier Family Charitable Fund (2005)  
Guy and Maggie Wickwire Fund (1989)  
Benjamin J. Williams, Jr. Fund (1986)  
Hope A. Williams Fund (1986)

Natica R. Williams Fund (1986)  
Ralph B. & Margaret C. Williams Fund (1985)  
Ralph B. Williams, II Fund (1986)  
Winkler Family Foundation Fund (2001)  
Owen Thomas Winship Fund (1998)  
Samuel Lee Winship Fund (1998)  
Wesley L. Winship Fund (1998)  
Jesse Winship-Freyer Fund (1998)  
Winsor Foundation Fund (1989)  
Jack & Judith Wittenberg Fund (1997)  
William W. Wolbach Fund (1986)  
Howard L. Wolf Memorial Fund (1981)  
Women’s Fund (1982)  
Karin E. Wood Fund (1993)  
Michael N. Wood Fund (1996)  
Fund for World Class Schools (2007)  
Wyett Family Fund (1988)  
Zabin Charitable Fund (2001)  
Sylvia and Robert Zell Fund (1988)  
Emily Zofnass Fund (1998) for the benefit of animal related causes,  
including organizations which have their primary purpose insuring  
quality care for domesticated animals  
T. Zouikin Charitable Fund (2003)  
Zug Family Fund (2008)

## Support Organizations and Other Special Funds

Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the Nashoba Valley

Deshpande Foundation (2007)  
Horace Moses Foundation (1995) to support Junior Achievement  
James M. and Cathleen D. Stone Foundation (1994)

# 2010 Financials

The Boston Foundation has a mandate both to fulfill its role as Greater Boston’s community foundation today—by maximizing dollars available for making grants—and to ensure that the charitable dollars entrusted to the Foundation are available to continue this work tomorrow and in perpetuity. Robust development efforts and a well-diversified investment strategy enable the Foundation to meet both these objectives.

## Fund for the 21st Century

The Fund’s assets are professionally managed in a pool known as the Fund for the 21st Century. The Foundation has a long-term investment horizon with relatively low liquidity needs. For these reasons, the Fund can tolerate short and intermediate term volatility in the interest of generating higher returns over the long-term.

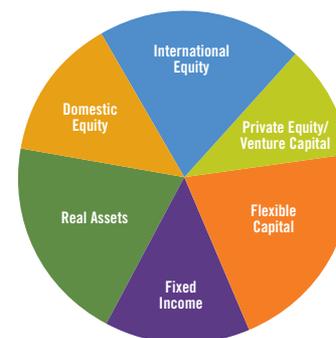
### Fund for the 21st Century Performance

as of June 30, 2010

	1 Year	3 Year	5 Year	10 Year
Fund for 21st Century (net of investment fees)	10.5%	-4.0%	3.7%	2.9%
Comparison:				
65% S&P 500 Index/ 35% BC Aggregate	13.0%	-3.6%	1.7%	1.5%

## Asset Allocation as of June 30, 2010

Domestic Equity	14%
International Equity	20%
Private Equity/Venture Capital	11%
Flexible Capital	21%
Fixed Income	14%
Real Assets	20%



## Financial Oversight

The Foundation’s Investment Committee establishes investment policy, monitors the individual investment managers and their performance, and sets each year’s spending rate. The Investment Committee is assisted by an independent investment consulting firm.

The assets of the Fund for the 21st Century include not only traditional stock and bond investments, but participation in private equity, venture capital, real assets (real estate, timber and energy) and flexible capital strategies. Diversification among multiple asset classes helps to reduce the volatility of the Foundation's endowment and should moderate market risk.

## The Spending Policy

By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2010 spending rate was 6% for all permanently restricted endowed Boston Foundation Funds. The

Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year plus 30% of the 6% spending rate applied to the current market value.

## Socially Responsible Investing

Four years ago the Foundation began to distance itself from companies that are engaged in business in the Sudan through a two-part strategy. This strategy includes divestment of any direct holdings in such companies and a new approach of shorting stocks that are held indirectly by the Foundation as the result of investments held in pooled funds.

## Activity from 2006 through 2010

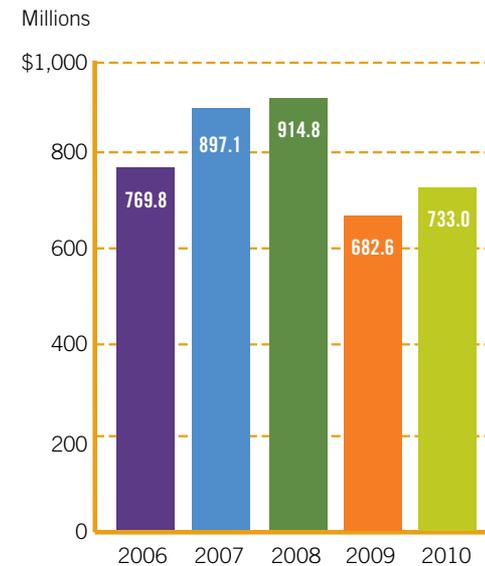
### Gifts Received



### Grants Paid



### Total Assets



## Audited Financial Statements

The Foundation's financial statements are prepared under policies and procedures overseen by the Foundation's independent Audit Committee and, ultimately, the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown here. The audited statements, are available on our web site at [www.tbf.org](http://www.tbf.org).

## Expense Control

The Foundation's management and Board of Directors take careful steps to ensure that operating expenses are kept as low as possible. Because of difficult economic times, many cost reduction measures that were implemented during fiscal year 2009 became effective during fiscal 2010. The Foundation strives to maintain an expense to total asset ratio of 1% or lower.

*The financial statements include all funds held by the Foundation, including the Fund for the 21st Century.*

## 2010 Summary Financial Statements

*(in thousands)*

### Assets:

Investments	\$	692,142
Receivables & Other		8,085
Cash Equivalents		<u>32,803</u>
Total Assets	\$	733,030

### Liabilities & Net Assets:

Accounts Payable and Accrued Liabilities	\$	5,626
Grants Payable		3,770
Other		503
Net Assets		<u>723,131</u>
Total Liabilities & Net Assets	\$	733,030

### Revenues:

Contributions	\$	82,913
Net Investment Return		<u>67,185</u>
Total Revenues	\$	150,098

### Grants & Expenses:

Grants	\$	82,464
Change in Split Interest Trusts		241
Program Support		5,275
Operating Expenses		<u>8,929</u>
Total Grants & Expenses	\$	96,909

Change in Net Assets	\$	53,189
Net Assets Beginning of Year	\$	669,942
Net Assets End of Year	\$	723,131



## Acknowledgments

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Designer **Kate Canfield**  
Photographer **Richard Howard**

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Photo of weatherization training on page 32 by Michael Liu, courtesy of the Chinese Progressive Association; Photo of Keith Lockhart and the Boston Pops on page 51 by Stu Rosner, courtesy of the Boston Symphony Orchestra; photo of ballet dancers on page 51, courtesy of José Mateo's Ballet Theatre of Boston. All other photos by Richard Howard.