

The Opportunity Pipeline

The Boston Foundation >>> Annual Report 2007





The Opportunity Pipeline begins with a child’s earliest experiences and continues through the entire K-12 educational system—then branches out to encompass all out-of-school hours. It moves on to the delicate interface between high school and college, and then extends to the diverse array of higher education institutions in Greater Boston. Finally, it embraces those adults who have missed or been denied opportunities for education and job training, with a special focus on newcomers to our community.

In its quest to fulfill its historic mission to assist Greater Boston’s most vulnerable people—and to meet the needs of a 21st century global economy—the Boston Foundation is proud to support every one of the points along the opportunity pipeline. This annual report, with a special introduction from our President and CEO, Paul S. Grogan, will tell you how we and our many partners go about it.

Front Cover, from left: Jacintha Fontello, Associated Early Care and Education at Castle Square; Leland Wu, Josiah Quincy Elementary School; Kaylee Lenner, KIPP Academy Lynn; Kenneth Santos, TechBoston Academy; Brandon Lee, Bunker Hill Community College; and Karicaty Conil, Beth Israel Deaconess Medical Center.

Table of Contents: Diego Ettetdgui, Bunker Hill Community College

Back Cover: Shivon Cesar, Beth Israel Deaconess Medical Center, with Her Daughter

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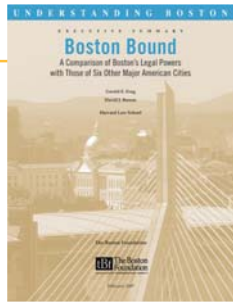
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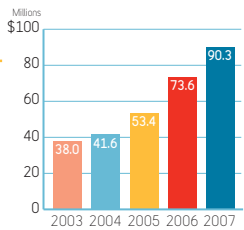
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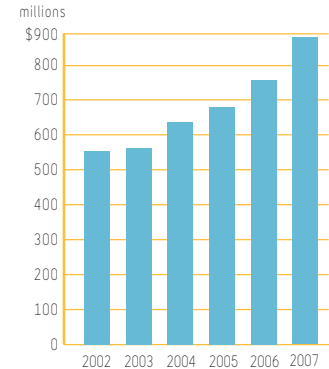
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2007 at the Boston Foundation

It is a robust and stimulating year for the Boston Foundation, including the release of a “revolutionary” new *Boston Indicators Report*, several pioneering studies, and progress made in each of the Foundation’s priority areas. Here are a few highlights:

Another Record Year Sees More than \$90 million in New Gifts Received and \$92 million in Grants Made

Gifts totaling more than \$90 million exceed all totals for gifts to the Boston Foundation in past years—with 54 new funds created by donors. Grants made to nonprofit organizations total a record \$92 million. At year’s end, the Foundation’s assets top \$897 million, more than \$100 million more than last year’s total.



Continuing Gains in Smart Growth Housing

More than 5,600 new housing units are in the state’s production pipeline thanks to the Foundation-convened *Commonwealth Housing Task Force* as 15 towns adopt “Smart Growth” districts under Chapters 40R and 40S legislation.

Understanding Boston

The Foundation conducts its civic leadership through this series, which commissions and releases fresh research, brings people together, and supports task forces to produce action agendas for change. The series publishes numerous reports, holds forums attracting thousands of people, and sees public policy victories in housing, cultural facilities and workforce development.



The Civic Leadership Fund Raises More than \$1 Million

For the fourth year running, the campaign exceeds its goal, raising \$1,017,880 to support the Foundation's 'beyond grantmaking' work, including its research, convenings and task forces.



The Massachusetts Life Sciences Collaborative Sets Goals

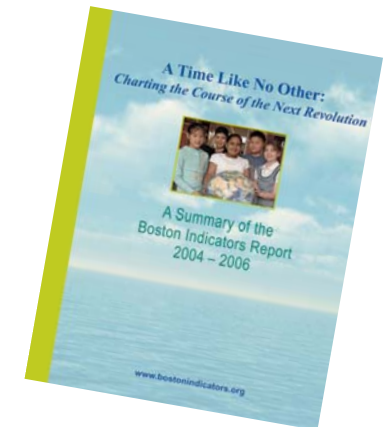
The Boston Foundation and the Massachusetts Technology Collaborative bring together leaders from industry, academia and government to set goals for growth in the life sciences. Governor Deval Patrick pledges support.

The Foundation's Sudan Strategy Hailed for its Innovation

Building on a strong tradition of socially responsible investing, the Foundation launches an innovative strategy to distance itself from companies engaged in business with Sudan.

Boston Indicators 'Revolutionary' Report is Released

The fourth biennial Boston Indicators Report, *A Time Like No Other: Charting the Course of the Next Revolution*, is released at a Boston College Citizen Seminar and John LaWare Leadership Forum. The report boldly reflects a region at the intersection of crisis and opportunity.



The Permanent Fund for Boston Renewed

At the unveiling of a special wall honoring members of the Rogerson Legacy Society, a campaign is launched to strengthen the Permanent Fund for Boston, which provides the flexible funds needed for the Foundation's grantmaking in Greater Boston.

Summer Activities for Teens

Some 75 neighborhood-based organizations receive \$840,000 in grants from the Foundation and other funders, enabling groups to expand evening and weekend hours.



Letter from the Chair

This year's annual report, with its theme of extending opportunity to every individual in our community, is a testament to the power of the Boston Foundation's *Permanent Fund for Boston*. Most of the grants made to the groundbreaking organizations and programs that are described in these pages came from that fund, which has been built by hundreds of people over the last 90 years. All of them wanted to leave a personal legacy to the people of Greater Boston.

The first donor to the *Permanent Fund for Boston* was a man named James Longley, who left a bequest of \$4 million in 1917. The Foundation, at that time, was just two years old, and his contribution gave the young organization the resources it needed to begin to have an impact on the community of Greater Boston.

Back then grants went to the Settlement Houses that were serving thousands of new immigrants who had come to America to fulfill their dreams of a better life. They supported the organizations that helped veterans who were dealing with the traumas of World War I—and the children and families living in the densely packed North End, which, at the time, was one of the most crowded neighborhoods of any city in the world. Boston Foundation grants funded the hospitals that treated the sick in the near panic that gripped the city during the flu epidemic of 1918. And they funded many of the same health care institutions and social service agencies that we rely on today.

Years later, in 1959, a Boston-area financier named Albert Stone Jr., left a surprise bequest of close to \$20 million to the Fund. It was by far the largest gift ever made to any community foundation in the country, and it doubled not only the Foundation's total assets, but also the funds it had for grantmaking. Now the Foundation had the resources to combat the rise in 'juvenile delinquency' in the early 1960s, help museums and other arts institutions reach out to new audiences—and give agencies like Freedom House the resources they needed to make important contributions to the Civil Rights movement.

Today, these early donors are continuing to contribute to our community. James Longley is helping innovative Pilot Schools to educate their students and prepare them for college. A social worker named Harriett Bartlett, who left close to a million dollars in the 1980s, is assisting immigrants and refugees as they begin their lives here and strive to make valuable contributions to our community. Arthur Stone Jr. is funding summer programs for young people.

As you look through the pages of this annual report, you will learn about some of the programs the *Permanent Fund for Boston* supported in 2007. Pilot Schools that are distinguishing themselves as superb educational institutions. Out-of-school programs that are not only keeping our young people safe, but giving them the extra academic coaching they need to ready themselves for college. Community-based organizations that are teaching English for Speakers of Other Languages to immigrants who are eager to contribute to our community. Workforce development programs that are giving hope to adults who have been lacking opportunity.

So consider the many innovative and essential programs the Boston Foundation was able to support this year not only in the areas of education and workforce development, but in housing, arts and culture, health, the urban environment and other areas. Know that it was all made possible by those who believed that there would be others in the generations following theirs who would do the work of feeding the hungry, housing the homeless, welcoming the immigrant, renewing the arts, and extending the opportunity of education to every child, young person, woman and man in our community.

Reverend Ray A. Hammond
Chair

Report of the President

I invite you to gaze upon the faces on the cover of this Annual Report and bear witness to Greater Boston's future. These young people, so full of light and promise, represent our very best hope. At a time when other cities and countries around the world are challenging our position as a center for innovation and excellence, it is these children and young adults who will lead us into the 21st century. Have no doubt about it.

This was a remarkable year for the Boston Foundation and our donors and partners. Once again, the Foundation broke records—receiving more than \$90 million in new contributions and making more than \$92 million in grants. You will read about many of these grants in this annual report, especially those that are helping to prepare our young people to become important contributors to our community and economy.

Every two years, the Boston Foundation and our partners release a new *Boston Indicators Report*, which synthesizes a vast sea of information and takes the pulse of our city and region, with all of its complexities. These reports—and the companion award-winning website—provide one of the most thorough and concentrated bodies of information available to any city in the world.

This year's report, *A Time Like No Other: Charting the Course of the Next Revolution*, builds a powerful case for shaking ourselves out of any complacency we may be harboring, and moving beyond incremental change—toward transformational change. I see that happening everywhere I look.

The *John LaWare Leadership Forum*, a dedicated group of business, government and nonprofit leaders determined to improve our region's competitiveness, is using the report to inform its goal of developing and meeting an ambitious civic agenda. One issue the Forum will address was inspired by an *Understanding Boston* report from the New England Healthcare Institute, which opened our eyes to the challenge of attaining health—and providing health care—in the context of a rising tide of chronic

disease. We are working with NEHI to use the information in the report, titled *The Boston Paradox: Lots of Health Care, Not Enough Health*, to make strides in confronting this crisis, which must be solved because of its economic implications and its central importance in people's lives.

The Boston Foundation's special grantmaking initiatives had a banner year. *SkillWorks*, a workforce development program created by the Foundation and other funders, inspired a national program called the *Fund for Workforce Solutions*, formed by the U.S. Department of Labor, which awarded grants to a number of programs, including \$450,000 to SkillWorks.

Neighborhood-based groups that provide safe and constructive activities for thousands of Boston youth received a total of more than \$840,000 in grants from the Boston Foundation and our many partners to add weekend and evening hours during the summer months. And the national initiative *Achieving the Dream* made grants to four of the Commonwealth's community colleges, two in Boston, largely because of the Boston Foundation's commitment to invest \$1 million over five years to the program.

I'm very proud of the role the Boston Foundation plays in these and many other endeavors. It's an exciting time to be at the Boston Foundation and to belong to this Greater Boston community. There is no doubt that we are facing a tough period, but we have all of the elements we need not only to weather the crises we're facing—but, as the Boston Indicators Report suggests, turn them into opportunities. Nothing gives me more confidence about our prospects than the young people of our community. Now look at those faces on the cover again and be very optimistic.

Paul S. Grogan
President and CEO

Board of Directors

From upper left:

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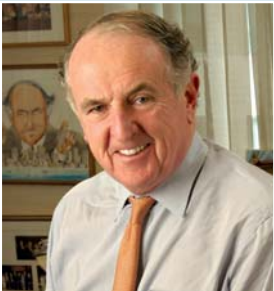
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Timothy B. Gassert
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Stacey C. Riddick,
Financial Operations Coordinator

Jessie E. Zuberek,
Fund Administration Coordinator

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Julia P. Goring, *Director of Human Resources*

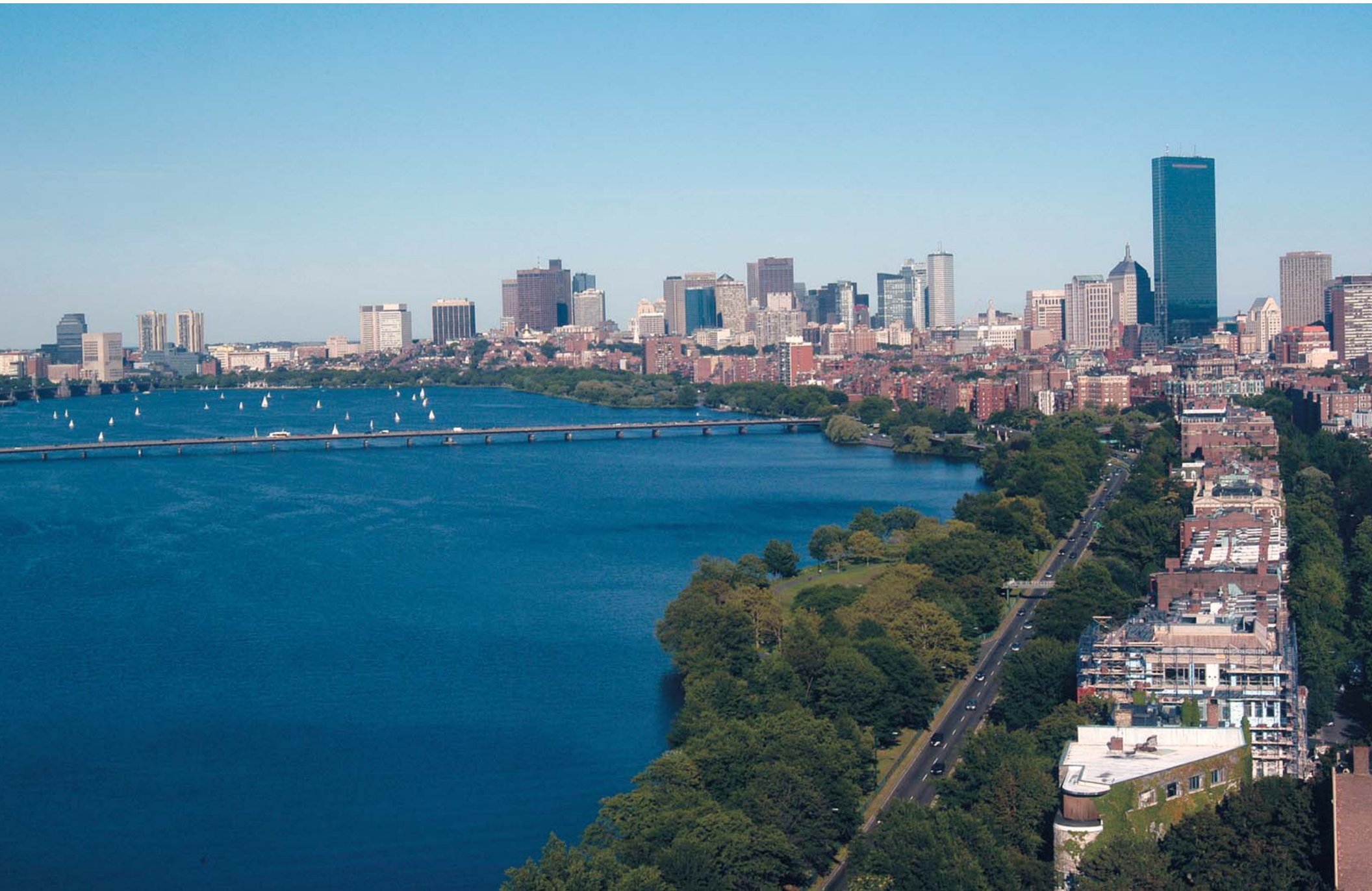
Lauren C. Baker, *Office Coordinator*

Anita M. Connors,
Travel & Events Planning Coordinator

Anna A. Gallo, *Receptionist*



Senior Management (from left): Lynne Salkin, Special Assistant to the President; Hope Groves, Chief Financial Officer; Ruben Orduña, Vice President for Development; Denise Taylor, Executive Assistant to the President; Paul S. Grogan, President and CEO; Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs; George Wilson, Chief Investment Officer; Kate Guedj, Vice President for Philanthropic and Donor Services; and Robert Lewis Jr., Vice President for Program



Understanding the Boston Foundation

A flexible giving vehicle for donors

A major funder of nonprofit organizations

A civic leader and convener

Mission

As 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:

- › Making grants to nonprofit organizations and designing special funding initiatives to address the community's critical challenges;
- › Working in partnership with donors to achieve high-impact philanthropy; and
- › 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.

Innovation

The Boston Foundation's grantmaking, special initiatives, and civic leadership promote innovation across a broad range of compelling community issues, from educational excellence to affordable housing to workforce development to galvanizing support for the arts. For more than 90 years, the Foundation has invested in innovative ideas and institutions—providing seed capital to Greater Boston's most important nonprofits, such as WGBH and City Year, and supporting great ideas, like the merger of several hospitals to make up Brigham and Women's Hospital and the clean-up of Boston Harbor.

Information

Through its *Understanding Boston* series, the Boston Foundation commissions fresh research—adding to a growing body of knowledge about the most important issues facing Greater Boston. The Foundation shares this information through a series of popular forums that are attended by thousands of people every year. 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 an award-winning state-of-the-art website at www.bostonindicators.org.

Impact

In its unique role as a grantmaker, developer of special initiatives and civic leader, the Foundation focuses on tangible, measurable results through its funding and special initiatives, while leveraging millions of dollars in investments from other foundations, donors, and government. It also establishes cross-sector task forces to tackle the toughest community challenges, such as affordable housing and support for the arts. It seeks to have a strategic impact on three areas which the Board of Directors has identified as crucial to Greater Boston's competitiveness and success, including: Housing and Community Development; Education; and Workforce Development.

Involvement

With some 900 separate funds established either for the general benefit of the community or for special purposes, the Foundation works closely with its donors to achieve their philanthropic goals. Some donors give unrestricted funds to the Permanent Fund for Boston, others earmark gifts for special purposes, and a number work closely with Foundation staff to focus their dollars on the areas of community life they care about most.

Close to \$40 Million in Additional Funds Leveraged

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 additional resources for the benefit of the city and region:

Close to \$3.9 million was received by the Foundation for special initiatives, such as those in the areas of civic engagement, gay and lesbian funding, homelessness prevention, expanded summer programming for teens and workforce development.

A \$500,000 Boston Foundation investment in SkillWorks raised \$2.1 million this year from other private and public sources, with a total of close to \$15 million pledged over the five years.

Close to \$870,000 in additional funds was managed and distributed by the Foundation, including \$650,000 for the Wallace Foundation's Excellence Awards to local arts organizations.

Some \$3.28 million was generated by collaboratives housed at the Boston Foundation, including \$513,000 for English for New Bostonians, \$1,280,000 for Home Funders, and \$473,000 for Achieving the Dream higher education funders collaborative.

More than \$2.2 in additional funds was distributed in collaboration with the Foundation's special initiatives, including software grants totaling \$1.1 million as part of the collaboration with Microsoft Corporation's "Unlimited Potential" giving program.

More than \$410,000 in co-funding came from Boston Foundation donors to strengthen the Foundation's Discretionary grants in Greater Boston.

A Program Related Investment of \$1.5 million for pre-development costs associated with single room occupancy housing for very low-income individuals **leveraged approximately \$26.5 million.**

Governance and Staff

The Foundation is overseen by a 20-member Board of Directors, selected to represent diverse interests within the community, and 50 staff members who work closely with donors, grantees, civic leaders, and community residents to have a positive impact on Greater Boston. The staff includes professionals in the areas of grantmaking, philanthropy, finance and administration, and communications.

Grantmaking

The Boston Foundation and its donors make millions of dollars in grants to thousands of nonprofit organizations in Boston and across the country every year. Discretionary grantmaking has a strategic focus on three areas of community life that are deemed crucial to the future competitiveness of Greater Boston and the region: *Housing and Community Development*; *Education*; and *Workforce Development*. Grants also are made in other important areas: Arts & Culture; Civic Engagement; Community Safety; Health and Human Services; and the Urban Environment.

Special grantmaking initiatives are designed by the Boston Foundation's staff to address the most pressing issues affecting contemporary community life in Greater Boston. Current special initiatives include those that focus on civic engagement, workforce development and summer safety.

Assets

The Foundation's assets stand at more than \$897 million. They are invested in The Fund for the 21st Century—a pool of investment management products created specifically for the Foundation that includes nationally-renowned money managers.

The Boston Foundation's Formula for Effective Civic Leadership

Fresh Research + Forums + Task Forces + Action Agendas = Real Change

The Boston Foundation works in close partnership with hundreds of leaders and stakeholders from all sectors to achieve real, measurable change in the areas that are most central to our region's competitiveness in the global economy. Those areas benefiting from the Foundation's *Understanding Boston* this year range from continued progress in Smart Growth housing to an eye-opening report on health and health care—to an examination of the very way in which Boston raises its revenues.

Fresh Research

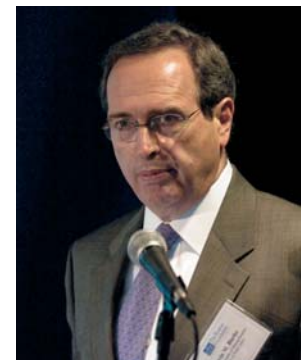
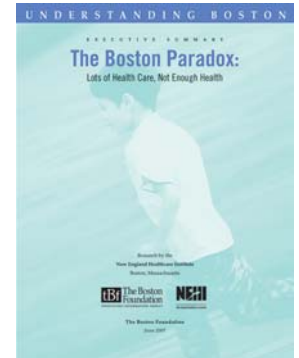
The fourth biennial Boston Indicators Report cast its net farther than ever to embrace emerging global trends and their importance to our future—while a massive study on Home Rule compared Boston's revenue-raising capacity with that of six other major American cities. In education, a detailed study of the challenges facing Massachusetts community colleges was released just as attention was shifting to these higher education institutions. And a groundbreaking study on health and health care revealed alarming statistics about Boston's state of health, while an evaluation of philanthropy uncovered some surprises about the generosity of Bay Staters.

Forums

Representatives of Governor Deval Patrick's administration and thousands of others came to the Boston Foundation this year to discuss the results of studies and engage in stimulating dialogues. Overflow crowds attended a forum on building a "jobs pipeline" that featured Suzanne Bump, the Secretary of Labor and Workforce Development. Those attending a forum on health care heard from Judy Ann Bigby, M.D., Secretary of Health and Human Services. Kevin M. Burke, Secretary of Public Safety and Security, spoke at a forum on CORI reform. And a forum on Home Rule featured Lt. Gov. Timothy Murray, as well as Boston Mayor Thomas M. Menino.

Task Forces and Action Agendas

Task forces of experts and stakeholders convened and facilitated by the Boston Foundation saw more results in 2007. The Commonwealth Housing Task Force's Smart Growth housing efforts continued to build momentum: now 15 towns and cities across the state plan to build as many as 5,600 units of housing. A new Life Sciences Collaborative came together with the participation of the Boston Foundation and the Massachusetts Technology Collaborative, and developed a set of challenging goals for that important segment of business for the state. And a Task Force on CORI Employer Guidelines tackled the challenging job of balancing community safety with the needs of formerly incarcerated people searching for work.





The Opportunity Pipeline

An Introduction by Paul S. Grogan

I don't need to remind you of Greater Boston's attributes, the qualities that make this city so remarkable, but I will. I'll start with the sheer beauty of it, the elegant formal parks and the informal green spaces—those that run along the banks of our shimmering rivers and on toward the cleanest urban harbor in the country and what is fast becoming a breathtaking waterfront. The famous teaching hospitals that offer the best medical care available anywhere in the world. The peerless array of colleges and universities and biotech research institutions that produce, attract and nurture some of the most brilliant minds of our time. Our magnificent arts organizations and enviable network of neighborhood-based nonprofits. Finally, by far our most precious asset, our people—comprising one of the most diverse populations of any city in America.

I won't go into our remarkable history, except to point out something that Edward Glaeser, an expert on the history of Boston's economy, draws to our attention—and that is that Boston has managed to survive as a city despite repeated periods of very serious crisis and decline, two in the 19th century and one in the late 20th century. He reminds us that in all of these instances, it was human capital that was the most valuable ingredient in turning things around, it was human capital that was the key to Boston's rebirth.

Today, as the most recent Boston Indicators Report, *A Time Like No Other: Charting the Course of the Next Revolution*, tells us, we find ourselves facing another of these periods of crisis. In the context of an incredibly accelerating and competitive global economy, one in which human knowledge and technical expertise are by far the most precious commodities, our workforce is literally declining. Labor shortages are appearing in every sector.

And, while a natural solution to this problem would be to educate and nourish homegrown talent, despite more than a decade of school reform, the achievement gap between black and Latino



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Creating a Foundation
for Learning

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Choosing the Boston
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Pipeline Philanthropists:
Libby and Sid Topol

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The Out-of-School Pipeline
Using Those Valuable Hours

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students and white and Asian students remains alarmingly and unacceptably wide. Finally, like a drumbeat, we are reminded that talented people are leaving our area because of the high cost of living here and the fact that home ownership is out of reach even for well-employed young people.

So, this is the question: will we develop the human capital we need to meet this crisis and create another rebirth, another revolution? Or, will we slip into an era of precipitous decline, watching helplessly as other cities in the United States and other countries ascend to take our place?

We at the Boston Foundation are very proud of the research we have commissioned that has drawn attention to this crisis, and captured this unique point in Boston's history. We're also gratified that the issues we have highlighted over the last several years—education, workforce development and housing—have insinuated themselves into the civic conversation and helped to inform major agenda-setting initiatives.

Proud as we are, we know that it's not enough to bring these issues to the community's attention. We must take the considerable human and financial resources we are entrusted with, as Greater Boston's community foundation, and turn this crisis into an opportunity.

There are two particular groups in our community that are neither participating in our economy nor preparing to participate. The first is the very large number of immigrants who come to Greater Boston with a tremendous amount of hope, but without English proficiency or the kinds of skills our economy needs. The Indicators Report tells us that in 2005, 28 percent of Bostonians were foreign born—and that without these newcomers, our population actually would have declined. It also tells us that if these immigrants are working at all, they're stuck in low-paying jobs, unable to improve their lives or those of their families.

The second group consists of young people living in our inner city neighborhoods—primarily African Americans and Latinos—who are dropping out of school in large numbers or completing high school without the ability to do college work and compete for the kinds of jobs this economy is creating.

Gratifying as it is to help small numbers of people in these groups improve their lives, we simply must move to the next level—we must strive to reach out to every member of our community and enlist their participation.

Of course, we recognize that many of these people are living with tremendous disadvantages. Homes that don't offer the kind of support they need. Poor health. Neighborhoods that are scarily

unsafe. And of course we are working hard to bring more supports to families that are struggling and encourage neighborhood revitalization. But we cannot wait until those problems are solved to make progress in the all important areas of education or workforce development. We must act now.

When considering how to move forward, we find it helpful to think in terms of an “Opportunity Pipeline,” which embraces the very youngest members of our community and extends through all levels of education, including adult education and job training. I use this metaphor because it helps to see the challenges as a ‘whole,’ and to understand the ways in which each point on the pipeline connects to the others and contributes to the ultimate goal.

The Boston Foundation’s aim is to make significant investments in powerful interventions at each stage of this pipeline and to encourage others to do the same. We think there is a moral imperative to do this, and we know that there is an economic necessity.

In this annual report, you will read about some very inspiring and successful programs and initiatives. Exemplary schools and out-of-school programs, advocacy initiatives that are engaging policy makers, new sources of funding, workforce development programs that are helping immigrants and others to enter the job market.

The time has passed when we can afford to sit back and be astounded by successful efforts and pat ourselves on our backs for supporting them. We need to make their success universal—to lift every school and every program and every initiative to their highest level.

I have used the ubiquitous term “human capital” here, but it is important to understand that behind that phrase are real people—children, adolescents, teenagers, young adults, mothers and fathers. And the needs of all of these people—and those they represent—just happen to align perfectly with the needs of Greater Boston at this unique point in time, what the Indicators Report calls “a time like no other.” They need us to open doors and help them pass through—and we need them to build our future.



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Preparing for Success
and Succeeding

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Pipeline Philanthropists:
Microsoft

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The Jobs Pipeline:
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The Early Education Pipeline: Creating a Foundation for Learning



Recent advances in the science of brain development reveal that early experiences profoundly determine whether a child's developing brain 'architecture' provides a strong or weak foundation for all future learning, behavior and even health. Harvard University's Dr. Jack P. Shonkoff, an author of the groundbreaking study "From Neurons to Neighborhoods," reports that for young children from low-income families,

high-quality early education programs have been demonstrated to enhance a child's cognitive and social development. Since the early 20th century, the Boston Foundation has supported early education for low-income children. Today, it focuses on extending those opportunities to all of the Commonwealth's children.

Smart from the Start

This year, the Boston Foundation provided \$125,000 to the Family Nurturing Center of Massachusetts for Boston's "Smart from the Start" campaign which is coordinating resources and offering free learning opportunities to Boston's lowest-income kids under the age of five—some 3,800 children—who face tremendous barriers to school readiness and success. Mayor Thomas M. Menino announced

Associated Early Care and Education, founded 127 years ago, received one of the first grants ever made by the Boston Foundation, and today serves 900 children every weekday.

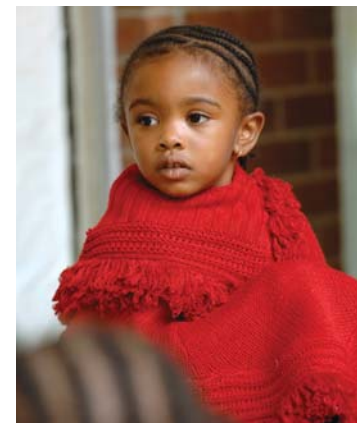
the campaign in his *State of the City* address. "We will continue to apply the most unflinching commitment to the challenge of educating all of Boston's children," he said, "because by opening up their minds, we can open up their worlds."

Strategies for Children

This year, too, the Foundation made a \$75,000 "Out of the Blue," unsolicited grant to the stellar organization **Strategies for Children** to build on the strides it is making in its **Early Education for All Campaign**. As a result of the campaign, Massachusetts has committed to providing access to high-quality early education for all children ages three to five, created a consolidated Department of Early Education and Care (a first in the nation), launched the Massachusetts Universal Pre-Kindergarten Pilot Program and created an Early Education Scholarship Program. Recently the campaign was buoyed by the news that Governor Deval Patrick's "Readiness Project" plans to include universal pre-kindergarten and full day kindergarten for all Massachusetts children.

What the Boston Indicators Report Tells Us about Early Education

Children who participate in high-quality early learning environments develop better language skills, score higher on school-readiness tests, have better social skills and fewer behavioral problems, and are more likely to be literate, employed and enrolled in post-secondary education as adults. Go to www.bostonindicators.org for more.



The K-12 Pipeline: The Boston Public Schools



Traditional schools. Charter Schools. Pilot Schools. The choices for Boston families these days are dizzying, and this year the Foundation made a grant of to the MATCH School Foundation to create a website, **BostonSchoolOptions.com**, which describes all of the options so that families can make the choices that are right for them.

Why Choose the Boston Public Schools?

This year, the Foundation provided a \$200,000 grant to support **Y/BPS**, a partnership between the City's school system and the YMCA of Greater Boston that the Boston Foundation helped found in 2001. The program answers parents' questions about the system and helps families think about the best match for their children.

Because Boston's school system, with its dropout rate at close to 50 percent, faces tremendous challenges, the Foundation makes major investments in programs that are working to improve the schools, such as a grant of \$50,000 to the **Boston Digital Bridge Foundation** to expand technology training in the Boston Public Schools. Major support also goes to organizations that are working toward sweeping school reform across the Commonwealth.



The Quincy Elementary School, led by the innovative principal Suzanne Lee, is consistently ranked among the top public schools in Massachusetts.

What the Boston Indicators Report Tells Us About K-12 Education

As of 2007, about 74 percent of the estimated 77,000 school-age children in Boston chose to attend Boston Public Schools, including its Pilot Schools. The largest alternatives are private and parochial schools, with some 12,000 students. Charter Schools see another 4,000 students—and 3,000 students go to suburban schools through the METCO Program.

Go to www.bostonindicators.org for more.

The Great Schools Campaign

The Foundation is a major supporter of Mass Insight Education's **Great Schools Campaign**, which mobilizes business, community and school leaders to urge Massachusetts to move beyond the first decade of school reform and help students reach for 'proficiency'—the skill level required for success after high school. The Foundation and the Campaign advocated for and received \$9 million from the Legislature this year to 'turn around' failing schools.

And in September, the Foundation's support helped the state, in partnership with Mass Insight, to secure a \$13 million grant—one of the first from the National Math and Science Initiative—funded primarily by Exxon Mobil. The grant is for Advanced Placement training, which offers college-level courses at high schools to foster the next generation of America's scientists and engineers.



Pipeline Philanthropist:

Barrie Landry



Barrie Landry is passionate about education and social justice—and her passion extends itself to supporting schools as close as Dorchester and as far away as Rwanda. Her own education, especially at Westover School, a high school for girls in Connecticut, convinced her of the powerful connection between education and opportunity—especially for girls. “Too often girls are left out when it comes to opportunities for leadership and power,” she says. “In Africa, there is a common belief that if you educate a girl, you educate a nation.”

Ms. Landry’s first major involvement with a local school came when the Executive Director of Mother Caroline Academy, a middle-school for girls from low-income families, asked her to co-chair a capital campaign. “It was especially gratifying,” she says, “because the facility we renovated was the old welfare building in Dorchester, where the riots started in the ‘60s. It was literally transformed from a symbol of dependence to one of independence for girls.”

Ms. Landry was introduced to the Boston Foundation by Carol Anderson, who is Vice-Chair of the Foundation’s Board and a Board member of Mother Caroline Academy, along with her. “I had a private foundation,” Ms. Landry says, “but having a Donor Advised Fund at the Foundation gives me a connection to a larger organization and the opportunity to meet other people who have the same passions I do. It helps me to think more strategically.” One of the grants she has made through the Foundation is to EdVestors, an organization launched by two other Foundation donors that matches donors with schools.

Ms. Landry heard about the Rwandan school when she was hosting an event for Kids Can Cook, an after-school program of South Boston’s Paraclete Center. “I overheard these young girls talking about raising money for a new school in Rwanda, and I was instantly intrigued,” she explains. She has traveled to Rwanda several times with Sister Ann Fox, Executive Director of the Paraclete Foundation, and has helped to raise funds for the school. In early January of 2008, the school will open, becoming a new symbol of hope and independence for young girls.

The K-12 Pipeline: The Charter School Choice



Boston Charter Schools are one of the great success stories in education reform. They offer parents choice, encourage competition among schools and foster innovation. In exchange for freedom in organizational structure, mission and academic programming, they are held to a high level of accountability. There are 61 Charter Public Schools through Massachusetts—14 in Boston alone—serving a diverse group of students and families with a primary focus on disadvantaged students.

Advocating for Charter Schools

Charter Schools have a strong ally in the **Massachusetts Charter Public School Association**, a major grantee of the Boston Founda-

tion. All of the state’s Charter Schools are members of the group, which advocates on their behalf. This year, a \$75,000 grant went to expand its work reaching out to parents and policy makers so that the Charter School option remains a strong one. “One of our goals is to make the voices of parents heard,” says the group’s Executive Director Marc Kenen, who has published books containing hundreds of letters from parents who have had great experiences with Charter Schools. “The growth of the Charter School movement is uncertain,” adds Mr. Kenen, “but if parents have anything to say about it, there will be many more of these great educational options in the future.”

When Knowledge is Power

One Charter School that opened in Lynn three years ago is part of the **Knowledge Is Power Program (KIPP)**. There are some 60 KIPP middle schools in America—and they are widely recognized for placing underserved students on the path to college. KIPP Academy Lynn is a free, public middle school that provides a college-preparatory education primarily for low-income students of color. From the first day, teachers make it very clear to students that higher education is the ultimate goal. This year’s 7th graders are called the “Class of 2012”—the year they will enter college.



What the Boston Indicators Report Tells Us About Charter Schools

The number of Boston children enrolled in Charter Schools increased from 2,700 in 2002 to 4,260 in 2007. Sixty-five percent of students served by Charters are African-American, 17 percent Hispanic, 14 percent special needs students, 13 percent white, and two percent Asian-American. Go to www.bostonindicators.org for more.

Last year, KIPP Academy Lynn outperformed not only other middle schools in Lynn, but also those in nearby Swampscott and Marblehead.

The K-12 Pipeline: The Pilot School Model

What the Boston Indicators Report Tells Us About Pilot Schools

Enrollment in Boston's Pilot Schools, which are part of the Boston Public Schools but operate more like Charter Schools, continues to climb. Today, more than 6,000 students attend 20 Pilot Schools, surpassing Boston's Charter School enrollment.

Go to
www.bostonindicators.org
for more.

TechBoston Academy is one of the high performing Pilot Schools in Boston, with a 92 percent graduation rate. Its primary goal is preparing its students for college and helping them find the resources to attend.

Boston's 20 Pilot Schools are part of the Boston Public Schools system, but operate with the kind of flexibility in staffing, budget and curricula allowed to Charter Schools. Many have received funding from the Boston Foundation, and the Foundation continues to advocate for the creation of more of these innovative schools.

Scholarships as "Teachable" Moments

Any skeptic of Pilot Schools needs to visit **TechBoston Academy** and talk with the school's principal Mary Skipper. Opened in 2002 with support from the Boston Foundation, the Academy receives students through the district's lottery system, and integrates technology through all of its instruction. The real focus, however, is on

every student graduating—and going on to college. From TechBoston's 2006-2007 class, 92 percent of students did graduate—and went on to college.

Last year, 34 TechBoston students—mostly low-income students of color—received the John and Abigail Adams Scholarship by excelling on the 10th grade MCAS exam. The scholarship pays for tuition at any state university and can be worth up to \$60,000. Ms. Skipper and her teachers use the announcements of the scholarship as a "teachable" moment to motivate incoming students. When asked how TechBoston Academy achieves its success, Ms. Skipper says simply: "Great teaching and great relationships. We show our students we care."

Building on the Model

The Center for Collaborative Education, which studies and advocates for Pilot Schools, conducted a comprehensive study of the state's Pilot High Schools. The 2006 study reveals that, whether students attend Pilot Schools through lottery or selection, students with risk factors—for instance those who received a warning on the 8th grade MCAS exam—do better than their peers at regular schools. A grant of \$125,000 went to the Center's work with the Department of Education to convert a number of 'underperforming' schools throughout Massachusetts into "Commonwealth Pilot Schools," using the successful approaches Boston's Pilot Schools have used to improve performance and students' lives.



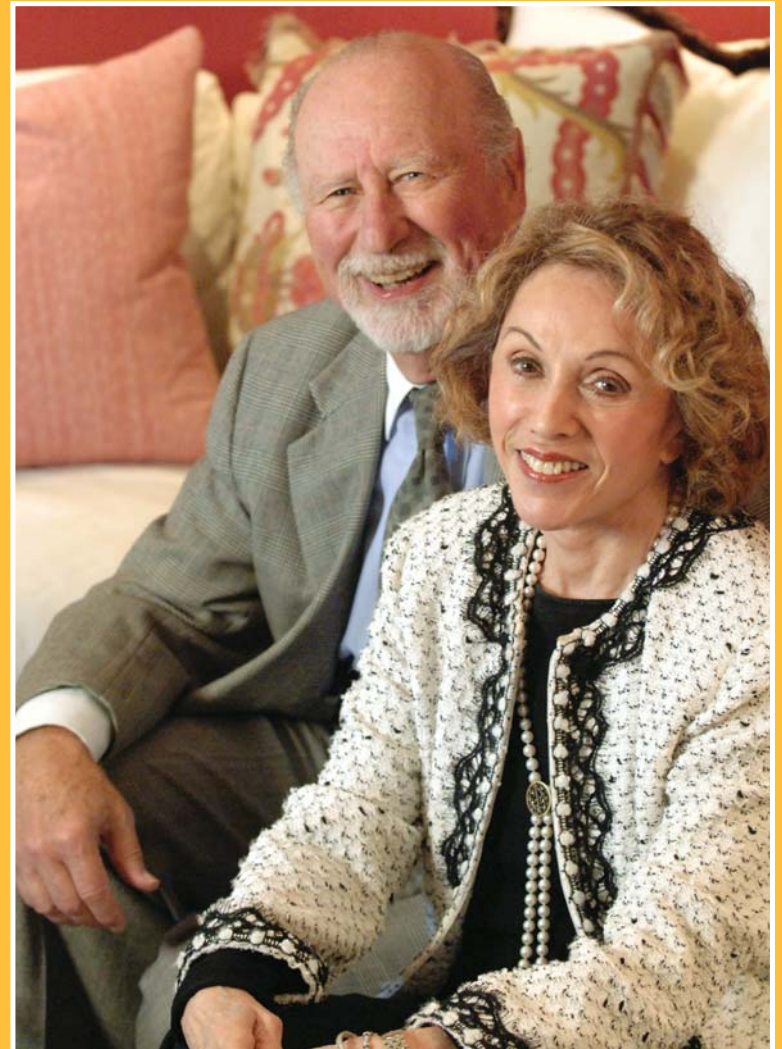
Pipeline Philanthropists:

Libby and Sid Topol > > > > > > > > > > > > > >

When they married in 1951, Libby and Sid Topol already had so much in common. They both had graduated from the Boston Public Schools—she from Roxbury Memorial High School for Girls and he from Boston Latin. She had gained a passion for education and cultural diversity during her time at Simmons College, majoring in the library sciences, and taking courses in Western civilization and politics. “The Simmons style of learning was an extraordinary revelation to me,” she says. “It totally changed how I perceived the world.” After putting her degree to work at the Boston Public Library, she decided to focus on raising their three daughters.

Mr. Topol graduated from the University of Massachusetts Amherst in 1947, although his education was interrupted when he volunteered for induction into the Army Air Corps in 1943. He returned after World War II, finished a degree in physics, and went on to become a pioneer in the communications industry, eventually serving as Chairman and CEO of Scientific-Atlanta for 19 years in Atlanta. While in Atlanta, he had become involved in a successful program that linked businesses with the public schools, much like the Boston Compact. But when the Topols returned to Boston with their family in 1990, they became very concerned about race relations here and deeply committed to diversity in education.

Their response was to become involved, in part through philanthropy by establishing a family fund at the Boston Foundation. Through their fund, the Topols have created a scholarship for minority students at Simmons College and made grants to strengthen Boston Latin, including a scholarship program that helps minority students from Boston Latin attend UMass Amherst. Their commitment to the Boston Public Schools and to their alma maters has come full circle. And now, after 55 years of marriage, raising three daughters and becoming philanthropists, they have more in common than ever.



The Out-of-School Pipeline: Using Those Valuable Hours



Thanks to the leadership of Mayor Thomas M. Menino, Boston ranks first in the nation in providing quality after-school programming. The Boston Foundation continues to partner with Boston After School & Beyond, an organization that evolved from early initiatives launched by the Mayor. Today, nearly 50 percent of Boston students participate in after-school programs, up from 27 percent in 1998. While out-of-school programs are desirable simply because they engage students in positive environments, they also can place low-income students on a trajectory toward college.

Paving the Way for Higher Education

The Boston Foundation was “There at the Beginning” for two of the most successful out-of-school programs in the country. BELL helps low-income children achieve academic and social proficiency during their formative elementary school years. Launched in Boston in 1992, today BELL is educating 12,000 elementary students in Boston, Baltimore and New York. BELL co-founder Earl Martin Phalen reports that in August, Step Up, an act proposed by Senator Barack Obama, was signed into law—creating a \$100 million pool for summer term education programs for 100,000 children nationwide. The act names BELL as a model for other programs to follow.



Middle-school students are served by Citizen Schools, which mobilizes adult mentors to engage young people in hands-on learning projects so that they can develop the academic and leadership skills they need to get into college. Launched in Boston in 1995, Citizen Schools now serves 3,000 students and engages 2,400 volunteers at 30 sites nationwide.

Expanding Summer Experiences for Teens

This summer, 75 neighborhood-based organizations that provide summertime activities for thousands of Boston teenagers received \$840,000 in grants from the Boston Foundation, United Way of Massachusetts Bay and Merrimack Valley, and a host of other foundations. The funding enabled programs with strong track records to add evening and weekend hours, surrounding teens with caring adults and engaging them in stimulating and constructive activities. The funds added more than 16,000 hours of extended programming this summer, reaching some 8,000 teens.

What the Boston Indicators Report Tells Us About Out-of-School Programs

Children spend only 20 percent of their time in school. As of 2006, 49.2 percent of Boston’s school-age children participated in after-school programs, well above the U.S. urban average of 22 percent. Some 73 percent of Massachusetts’ children have working parents and require care after school.

Go to bostonindicators.org for more.



Centro Presente in Cambridge received funding to expand its programming for teens this summer—with an emphasis on the creative arts.



Bunker Hill Community College was one of the schools to receive an award from Achieving the Dream.

The Higher Education Pipeline: Preparing for Success and Succeeding

No student of the Boston Public Schools should be denied a college education because of a lack of funds or information. This is the philosophy and goal of **ACCESS**, which was created in 1985 with “There at the Beginning” support from the Boston Foundation. Since then, ACCESS has advised more than 32,000 students, awarded more than \$3.5 million in scholarships—and leveraged an additional \$30 million. This year, the Foundation made a grant of \$50,000 to ACCESS to increase the number of students it serves.

Focusing on Graduation

The Foundation also made a \$50,000 grant to **Bottom Line**, an organization that helps Boston public school students apply to four-year colleges—but doesn’t stop working with them when they receive an acceptance letter. Rather, its counselors continue to work with students until they graduate and begin their adult lives.

While four-year institutions come to mind first when the word “college” is spoken, almost half of all undergraduate students in America attend community colleges. When these students succeed, the benefits are profound, creating a bridge to additional higher education and a fulfilling work life. But an



Understanding Boston report released this spring revealed that the graduation rate at the Commonwealth’s community colleges is only 17.4 percent, lower than the national average at 21.5 percent.

Achieving the Dream

The Boston Foundation played a major role in bringing **Achieving the Dream** to Massachusetts, a national program focused on closing the achievement gap for students of community colleges. The Foundation is investing \$1 million over five years in the program, which awarded large grants to four Massachusetts community colleges including two in Boston—Bunker Hill Community College and Roxbury Community College. The colleges will use the awards to strengthen their capacity to close student achievement gaps and other related efforts. “The ultimate impact of these resources will serve to strengthen all community colleges,” says Bunker Hill Community College President Mary Fifield, “which are a uniquely American, democratizing force in our country.”

What the Boston Indicators Report Tells Us about About Higher Education

In 2003—the most recent available data—eight percent of degrees awarded by the University of Massachusetts system were to Black, Hispanic or Cape Verdean students. For state colleges, the figure was five percent, and for community colleges, 14 percent. The student population of the state’s community colleges is 25 percent of color. Go to www.bostonindicators.org for more.



Pipeline Philanthropists:

Microsoft



In 2005, executives of the software giant Microsoft, which for years had quietly been making donations of software and hardware to nonprofits in Massachusetts, were looking for a partner to introduce them to urban technology centers in Boston. Enter the Boston Foundation, which had been supporting the strategic use of technology for education, workforce training and capacity building for nonprofits for several years. One of the results of the newly-formed partnership was the *Microsoft Unlimited Potential Fund*, a Donor Advised Fund at the Boston Foundation that distributes \$200,000 annually in grants to nonprofits offering technology training and education.

“The Boston Foundation was perfectly perched to see the needs in the community,” says Brian Burke, who is Director of Government Affairs for Microsoft’s New England District, but is involved in a number of other areas, including philanthropy. “Our relationship with the Foundation came at a transitional period for us,” he adds. “For years, we had been making what I call ‘drive by’ donations to a number of nonprofits in Massachusetts, totalling \$30 million between 2000 and 2005, but we wanted to begin to make larger grants to fewer organizations over longer periods of time—and wanted to engage more directly with our grantees.” Mr. Burke has become so involved that he now serves on the board of one of those grantees—the Timothy Smith Network, which links together 40 community-based technology centers.

Front to back: Microsoft’s Andrea Taylor; Joanne Hilferty (President of Morgan Memorial Goodwill Industries, which received \$100,000 from the Microsoft Fund); and Microsoft’s Brian Burke at a workforce training class at Goodwill

Microsoft’s national philanthropy is conducted through its *Unlimited Potential Community Technology Skills Program*, which has the astounding goal of training one billion people world-wide in information technology by 2015. “In almost all geographic areas, we partner with other organizations that know their constituencies,” says Andrea Taylor, Director of Microsoft Community Affairs for North America. “We look for community organizations that have respected leaders, close relationships with community-based groups, and can quickly help us with on-the-ground knowledge. That description fits the Boston Foundation perfectly. It’s a great partnership.”

The Jobs Pipeline: Educating Our Future Workforce



Without foreign-born newcomers, the population of Massachusetts actually would have declined in recent years—which serves to highlight a growing need for instruction in English for Speakers of Other Languages. This year, the Foundation made a grant of \$150,000 to the City of Boston’s **Office for New Bostonians** to bolster its ability to offer ESOL to thousands of people through community centers in neighborhoods where newcomers live.

Concentrating on Basic Skills

Providing basic education to people right where they *work* is the hallmark of the **Allied Health Initiative**, which the Foundation established with a \$500,000 grant this year. It was created after Beth Israel Deaconess Hospital approached the Foundation with a problem. While the hospital needs allied health professionals, and would like to tap its own employees for training, many staff

members simply don’t have the basic skills they need for training, much less go on to college. Responding to the challenge, the initiative provides pre-college classes to workers, on site, at times that accommodate their work schedules. Two hospitals participating—Beth Israel Deaconess and New England Baptist—are working with area community colleges to offer classes. Another participant, Partners HealthCare, operates its own program.

A National Boost for a Local Model

The Allied Health Initiative grew out of **SkillWorks**, a workforce development initiative created by the Boston Foundation and funded by the City of Boston and a number of other foundations. In just five years, SkillWorks has provided training for some 2,700 people to work in the health care, automotive and hotel industries. And this year, it provided a model for a major national program, the **Fund for Workforce Solutions**, formed by the U.S. Department of Labor and large foundations. SkillWorks itself received \$450,000 from the program, and will use the funding to plan its next phase of work—helping even more people achieve the American dream of a job with a livable wage.

What the Boston Indicators Report Tells Us About Our Workforce

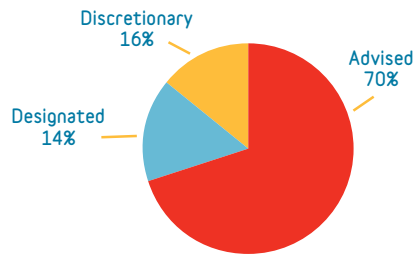
Labor shortages are appearing in every sector. An October 2006 Conference Board report showed that Massachusetts had 170,000 advertised vacancies, and posted 5.05 vacancies for every 100 persons in the state labor force, the highest rate of any state in the nation. Go to bostonindicators.org for more.



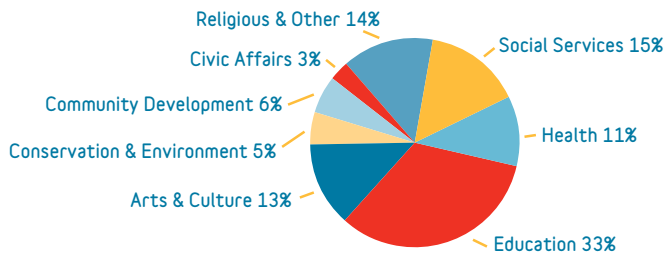
Adult education and ESOL classes at organizations like the Vietnamese American Civic Association offer immigrants an entryway to job training and college.

Selected Grants from 2007

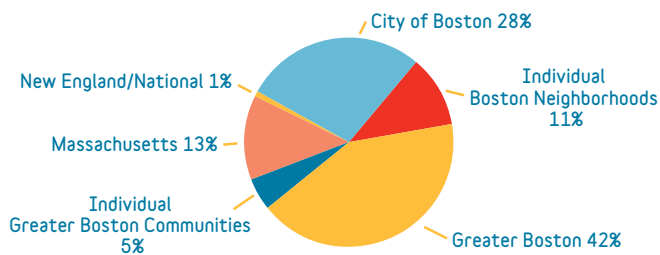
2007 Grants Paid by Fund Type



2007 Grants Paid by Program Area from All Fund Types



Geographic Distribution of Discretionary Grants



In 2007, the Boston Foundation and its donors made some \$92 million in grants to nonprofit organizations in the Greater Boston community and across the country. To convey the full breadth of this grantmaking, a representative group of selected grants from all funds—Discretionary, Designated and Advised—are presented in the following pages, organized by broad categories. The Foundation’s Board of Directors authorizes all grants.

Selected Grants from Discretionary Funds

Discretionary Funds are the primary funds for which nonprofit organizations may apply. They include: the Permanent Fund for Boston which is the largest unrestricted fund and has been built by hundreds of civic-minded Bostonians over the years; Named Funds—often established to honor a notable person or organization; and Field of Interest Funds, created by donors who care deeply about a specific area of community life. Many grants are made from a combination of these different kinds of funds. In the following lists, we briefly describe the purpose of each grant.

The largest proportion of grant dollars from Discretionary Funds benefit Greater Boston as a whole (42%), or target the City of Boston and its individual neighborhoods (44%). Of the neighborhoods, the largest percentage of funds go to Roxbury, North Dorchester and Allston Brighton. Another 13% go to projects that benefit the entire state.

Selected Grants from Designated Funds

Grants from Designated Funds go to specific nonprofit organizations in keeping with the terms established by donors over the years. These grants provide annual support for many of the community’s most important institutions. There are no purposes listed for these grants because they are generally for broad organizational support.

Selected Grants from Donor Advised Funds

Donor Advised Funds are established by people who want to be actively involved in the grantmaking process. Many of these donors have a commitment to strengthening the Greater Boston community, and take advantage of the knowledge the Boston Foundation has about the issues that are most pressing and the nonprofit organizations that are most effective. There are no purposes listed for these grants because they are generally for broad organizational support.

SELECTED GRANTS

Social Services

A total of **\$13,086,132** in grants was made in the area of Social Services. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Asian Task Force Against Domestic Violence, \$30,000
\$15,000 from the Charles Frederick Joy & Dora Marie Joy Fund and \$15,000 from the Permanent Fund for Boston
For “Connecting Our Resources: Filling the Gap,” a project that seeks to bring together domestic violence agencies, social service organizations and immigrant services providers to improve prevention and intervention

Family Service of Greater Boston, \$50,000
\$5,500 from the Jamaica Plain Dispensary Fund and \$44,500 from the Permanent Fund for Boston
For the “Care Management and Evaluation System” initiative to enhance Family Service’s technology, and improve client intake, care management and other activities

Home for Little Wanderers, \$30,000
From the Frank B. & Watson G. Cutter Fund
For support of the staff costs of the Task Force on Youth Aging Out of DSS Care’s “Blueprint for Action”

Political Asylum/Immigration Representative Project, Inc., \$25,000
From the Permanent Fund for Boston
For the “Comprehensive Care for Torture Survivors Project,” which seeks to develop a holistic model of comprehensive services to low-income asylum seekers and survivors of torture and trauma in the Greater Boston area

Grants from Designated Funds

Salvation Army, \$15,344
Walter W. Gove Fund

Bay Cove Human Services, \$100,000
John Larkin Thompson Fund

Cooperative Assistance for Care and Relief Everywhere (CARE), \$7,031
Dana P. and Maude E. Simpson Memorial Fund

East Boston Social Centers, Inc., \$28,108
East Boston Social Centers, Inc. Fund

Home for Little Wanderers, \$11,364
Harry D. Neary Fund

Grants from Donor Advised Funds

Julie’s Family Learning Program, Inc., \$20,000
Mellowes Fund

America’s Second Harvest, \$261,019
Dunkin’ Brands Community Foundation Fund

Arch Foundation, Inc., \$25,000
Albert J. & Diane E. Kaneb Family Fund II

Jewish Family and Children’s Service, \$10,000
Kaye Charitable Fund

What the Boston Indicators Report Tells Us About Social Services

About 24 percent of the homeless in Boston are children, up from 20 percent in 2004, and higher than any other year except 1993 and 1994. Just less than one quarter are women, a statistic that has remained stable.

www.bostonindicators.org

SELECTED GRANTS

Health

A total of **\$9,769,341** in grants was made in the area of Health. Here is a brief representative sampling from the three different types of funds.

What the Boston Indicators Report Tells Us About Health

As reported by the New England Healthcare Institute, 50 percent of health status is determined by lifestyle factors and 20 percent by exposure to toxins—yet 88 percent of health care dollars are spent on access to care and treatment, and only four percent to support lifestyle changes.

www.bostonindicators.org

Grants from Discretionary Funds

Alzheimer's Association, Massachusetts Chapter, \$50,000

From the Frederika Home Fund

For a campaign to reduce the prevalence of dementia and Alzheimer's disease within Latino and African-American communities

Fenway Community Health, \$50,000

From the Permanent Fund for Boston

For a feasibility analysis of service expansion at Fenway Community Health Center's new facility

Health Care for All, \$75,000

From the Permanent Fund for Boston

To support the "Massachusetts Health Reform Implementation Project" which is focusing on ensuring that the new health care reform law is fairly and effectively implemented

Partners in Health, \$40,000

From the Permanent Fund for Boston

For the PACT Project's "Fuerza Latina" outreach program, a three-year effort to establish a Boston Latino Harm Reduction Collaborative

Grants from Designated Funds

Easter Seals Massachusetts, Inc., \$1,755

Americo Francisco Charity Fund

Tufts New England Medical Center, \$30,855

James F. Casey Fund

American Cancer Society, \$1,594

Alison L. Stevens Fund

Brigham and Women's Hospital, \$1,539

James W. & Margaret A. Ingraham Fund

Children's Hospital Corporation, \$39,738

Charles & Cornelia Pfaff Fund

Grants from Donor Advised Funds

Doctors Without Borders, \$10,000

Charles S. and Zena A. Scimeca Charitable Fund

Boston Health Care for the Homeless, \$10,000

Baupost Group Charitable Fund

Brain Tumor Society, \$25,000

Steven E. Karol Charitable Foundation

Dana Farber Cancer Institute, \$15,000

Orrie M. Friedman Charitable Fund

Cystic Fibrosis Foundation of Massachusetts and Rhode Island, \$8,000

Topol Family Fund

SELECTED GRANTS

Education

A total of **\$29,968,480** in grants was made in the area of Education. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Boston Parent Organizing Network, \$125,000

From the Theodore C. Hollander Trust Fund

For the Network to continue its parent organizing and advocacy work in the Boston Public Schools

Boston Private Industry Council, Inc., \$135,000

From the Permanent Fund for Boston

To undertake a research project that examines postsecondary outcomes for Boston Public School students

Harvard Law School, \$100,000

From the Permanent Fund for Boston

For the Charles Hamilton Houston Institute for Race and Justice's two-year research project aimed at stemming the flow of at-risk youth out of school and into juvenile halls and prisons

Tenacity, Inc., \$30,000

From the Permanent Fund for Boston

For support of the After-School Excellence Program, Tenacity's core school year program, which provides literacy and academic support, mentoring, life skills training and tennis/physical fitness programming for middle school students

Grants from Designated Funds

Amos Tuck School of Business Administration, \$3,389

Stetson Whitcher Fund

Brookline High School, \$1,000

Brookline Youth Concerts Fund

Perkins School for the Blind, \$18,535

Rae and Aaron Alberts Foundation Fund

Hebrew College, \$1,329

Benjamin M. Feinberg Fund

Massachusetts Institute of Technology Center for International Studies, \$20,000

Curtis International Council Fund

Grants from Donor Advised Funds

Noble and Greenough School, \$16,500

Fulton Family Fund

Tilton School, \$10,000

Gilbert H. Hood Family Fund

Year Up, Inc., \$10,000

Ipswitch Fund

Posse Foundation, \$1,000

G. Barrie Landry Fund

North Bennet Street School, \$1,000

Morgan Palmer Fund

What the Boston Indicators Report Tells Us About Education

About 18 percent of Boston public school students are English language learners. With students hailing from 47 countries, the five most common native languages other than English spoken by students are in order: Spanish, Haitian Creole, Chinese, Cape Verdean Creole, and Vietnamese.

www.bostonindicators.org

SELECTED GRANTS

Cultural Institutions, Arts and Humanities

A total of **\$11,995,087** in grants was made in the area of Cultural Institutions, Arts and Humanities.

Here is a brief representative sampling from the three different types of funds.

What the Boston Indicators Report Tells Us About Cultural Institutions, Arts and Humanities

More than 16,000 artists live in Greater Boston, all of whom contribute to the region's "creative economy." The entire Commonwealth benefits financially from the revenues generated by the creative economy. For example, statewide, in 2005, cultural tourism generated \$9.8 billion in economic activity.

www.bostonindicators.org

Grants from Discretionary Funds

Arsenal Center for the Arts, Inc., \$50,000

From the Boston Foundation Arts Fund

For staffing and other costs associated with programming and marketing

First Night, \$100,000

From the Permanent Fund for Boston

To implement its turn-around business plan, a new revenue model to increase individual contributions and earned income from button sales

Madison Park Development Corporation/ACT Roxbury, \$50,000

From the Permanent Fund for Boston

To support the hiring of a full-time marketing staff person and related costs for ACT Roxbury

Museum of African American History, Inc., \$50,000

From the Permanent Fund for Boston

To develop a docent program for the newly restored African Meeting House to enhance the interpretation of its buildings and exhibits, expand educational outreach to schools and after-school programs, and build museum capacity and community ties

Grants from Designated Funds

Boston Baroque, Inc., \$1,079

Boston Baroque Fund

Boston Children's Museum, \$80,048

Michael Spock Community Service Fund

Boston Symphony Orchestra, \$87,479

Miriam & Sidney Stoneman Fund

Community Music Center of Boston, \$4,646

Felix Fox Memorial Fund

Easton Historical Society, \$31,367

Robert D. and Sally G. King Fund

Grants from Donor Advised Funds

Boston Children's Museum, \$3,000

Remmer-Fox Family Fund

Museum of African American History, \$17,500

James M. and Cathleen D. Stone Foundation

New England Aquarium, \$5,000

Mill River Fund

Raw Art Works, \$5,000

Coolidge Family Fund

Lyric Stage Company, \$10,000

Golden Family Fund

SELECTED GRANTS

Conservation/Environment

A total of **\$4,296,453** in grants was made in the area of Conservation/Environment. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Conservation Law Foundation, Inc., \$50,000

From the Permanent Fund for Boston

For the Boston Area Transit Project, which seeks to ensure that Boston has a modern, accessible, affordable, environmentally sound and securely funded urban transportation system

Rose Fitzgerald Kennedy Greenway Conservancy, \$125,000

\$110,000 from the Frank B. & Watson G. Cutter Fund and \$15,000 from the Permanent Fund for Boston

For the Manager for Design and Construction and two consultants to provide technical advice to assure the quality of the build-out of the Greenway

Save the Harbor, Save the Bay, Inc., \$100,000

\$10,000 from an Anonymous Fund and \$90,000 from the Permanent Fund for Boston

To execute the recommendations of the Metropolitan Beaches Commission, which seeks to implement solutions to issues of maintenance, water quality, programming and public involvement in Greater Boston's beaches

WalkBoston, Inc., \$50,000

From the Permanent Fund for Boston

For its Great Streets Project, which will work on signalization and the pedestrian environment surrounding the Kennedy Greenway

Grants from Designated Funds

Charles River Conservancy, \$577

Charles River Parklands Stewardship Fund

Natural Resources Trust of Easton, \$173,742

From the Sheep Pasture Fund

New England Forestry Foundation Fund, \$7,652

From the New England Forestry Foundation Fund

Earthworks Projects, Inc., \$6,500

Boston Schoolyard Funders Collaborative

Gaywest Farm Fund, \$13,457

From the Capen Hill Nature Sanctuary

Grants from Donor Advised Funds

Island Alliance, \$10,000

Butler's Hole Fund

Conservation Law Foundation, \$2,000

Thomas E. and Barbara B. Leggat Fund

Emerald Necklace Conservancy, \$11,500

Plimpton-Shattuck Fund

Heifer Project International, \$5,000

Fishreys Family Philanthropic Fund

Trustees of Reservations, \$2,500

Gerard B. Townsend Charitable Fund

What the Boston Indicators Report Tells Us About Conservation and the Environment

Greater Boston is a recognized leader in promoting "sustainability," the wise use of scarce land, water and energy resources, and investment in innovative green industries. Global climate change concerns have led to measurable commitments by local and state officials and the private sector to address greenhouse gas emissions.

www.bostonindicators.org

SELECTED GRANTS

Community Development

A total of **\$5,064,678** in grants was made in the area of Community Development. Here is a brief representative sampling from the three different types of funds.

What the Boston Indicators Report Tells Us About Community Development

The National Low-Income Housing Coalition's 2006 report, *Out of Reach*, found that in Metropolitan Boston, a full-time worker would have to earn \$26.27 per hour to afford a two-bedroom apartment. This places Metro Boston as the sixth "least affordable" metropolitan area for renters.

www.bostonindicators.org

Grants from Discretionary Funds

AIDS Housing Corporation, \$40,000

From the Edith M. Ashley Fund

For support of the Consumer Action Network/United Disability Partnership, which brings consumers from different disability communities together to advocate for the common need for safe, affordable and accessible housing

Citizens' Housing and Planning Association, Inc., \$60,000

\$8,000 from the Nathaniel Hooper Fund and \$52,000 from the Permanent Fund for Boston

For its Greater Boston and statewide housing advocacy activities

Homes for Families, \$30,000

From the Frank B. and Watson G. Cutter Fund

To cover the cost of a media consultant and staffing for the "Housing Solutions Campaign"

Massachusetts Association of Community Development Corporations, \$75,000

From the Permanent Fund for Boston

For the "Local Investments for Tomorrow Campaign," an effort to utilize grassroots advocacy techniques for secure legislative and budgetary victories to build and preserve affordable housing and other goals

Grants from Designated Funds

Hyde Square Task Force, \$34,000

EdVestors Collaborative Fund

Action for Boston Community Development, Inc., \$18,000

Summer Safety Funders Collaborative

Crittenton Women's Union, \$10,335

Hastings-Plummer Fund

Massachusetts Affordable Housing Alliance, \$30,000

Civic Engagement Project Fund

Jewish Vocational Service, Inc., \$7,900

English for New Bostonians Fund

Grants from Donor Advised Funds

Massachusetts Stand for Children, \$50,000

Munger Family Fund

Habitat for Humanity, \$50,000

Shields Family Fund

Neighbor to Neighbor, \$5,000

Circle Fund

Youthbuild USA, \$2,500

Abromowitz/Ruttenberg Family Fund

Housing Opportunities for Women, \$30,000

J. Jill Compassion Fund

SELECTED GRANTS

Civic Affairs

A total of **\$3,052,951** in grants was made in the area of Civic Affairs. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Gay and Lesbian Advocates and Defenders, \$20,000

From the Harriett M. Bartlett Fund

For the "Public Affairs and Education Program," a public awareness campaign focused on increasing support for LGBT rights

John F. Kennedy Library Foundation, \$75,000

From the Permanent Fund for Boston

To support its outreach program and its public forums, particularly on issues of concern to Greater Boston

Massachusetts Coalition for Occupational Safety and Health, Inc., \$30,000

From the Permanent Fund for Boston

To expand the Immigrants' Safe Worker Center, which seeks to educate, mobilize, and build the leadership capacity of immigrants to improve their workplace and environmental conditions, advocate for healthy jobs and influence work environmental policies

National Black College Alliance, Inc., \$35,000

From the Permanent Fund for Boston

For its "Next Generation" program, a year-long civic leadership program for young African-American professionals in Boston

Grants from Designated Funds

Haitian American Public Health Initiatives, \$30,000

Civic Engagement Project Fund

Andover Village Improvement Society, \$5,000

From the Bessie P. Goldsmith Fund

Social Law Library, \$82,014

From the Social Law Library Endowment Fund

Massachusetts Immigrant and Refugee Advocacy Coalition, \$38,000

From the English for New Bostonians Fund

Grants from Donor Advised Funds

Acorn Institute, \$10,000

Rodgers Community Fund

Pioneer Institute, \$10,000

Colby Charitable Fund

Women's Voices-Women's Vote, \$10,000

Villers Fund

Southern Poverty Law Center, \$1,000

Cooper Leeser Family Fund

Greater Boston Legal Services, \$3,000

Zabin Charitable Fund

What the Boston Indicators Report Tells Us About Civic Affairs

Recent high-profile elections in the state have boosted political leaders who reflect the racial and gender diversity of the greater population. These include: the election of the state's first African-American Governor, Deval Patrick; the first female Attorney General, Martha Coakley; and the first Asian American City Councilor-at-Large, Sam Yoon.

www.bostonindicators.org

SELECTED GRANTS

Special Initiatives

The Boston Foundation plays a leadership role in developing focused initiatives in key areas of civic life where intensive involvement has the potential for significant impact. On these pages are brief descriptions of the initiatives and a brief representative sampling of the grants from them.

The Civic Engagement/ Voter Participation Initiative

This initiative was established by the Boston Foundation and supported by several foundations. It is specifically focused on increasing voter turnout in low-income neighborhoods where voter participation has been historically low. In 2007, grants went to the following groups:

Boston Tenant Coalition

Chelsea Collaborative

Chinese Progressive Association

Dudley Street Neighborhood Initiative

Fenway Community Development Corporation

East Boston Ecumenical Community Council

Haitian American Public Health Initiatives

Hyde Square Task Force

Massachusetts Affordable Housing Alliance

**Massachusetts Association of Community Organizations
for Reform Now**

The Homelessness Prevention Initiative

This effort is demonstrating the effectiveness of helping low-income households at risk of losing their homes stay in their homes. The Initiative is a collaborative of the Boston Foundation, Tufts Health Plan, the Massachusetts Medical Society and Alliance Foundation, the Starr Foundation and the Ludcke Foundation. Phase One grants were made to 18 organizations in various parts of the state. In 2007, Phase Two grants were made to the following seven organizations, exclusively in Greater Boston, which demonstrated best results from Phase One:

Advocates, Inc., \$70,000

For advocacy, benefits and legal services

Family to Family Project, Inc., \$40,000

For the Homelessness Prevention Partnership

HomeStart, Inc., \$95,000

For the HouseHold Program

Interseminarian-Project Place, Inc., \$85,000

For the Comprehensive Homeless Intervention Program

Metropolitan Boston Housing Partnership, \$95,000

For support of the Staying Home program

Rosie's Place, \$40,000

For the Homelessness Prevention Outreach Program

Somerville Mental Health Association, \$99,562

For the Somerville Homelessness Prevention Program

Pilot School Initiative

This initiative is designed to support Boston public schools interested in exploring the Pilot School model. Like charter schools, Pilot Schools have flexibility in hiring, scheduling, work rules and budgeting. In 2007, the Foundation made grants to the following schools:

Friends of Young Achievers, inc., \$25,000

For the Facility Expansion Project

Gardner Extended Services School, \$100,000

For the implementation of its Pilot School Plan

The Harbor School, \$18,000

To explore the creation of a high school component to the Harbor Middle School

Warren-Prescott School, \$18,000

For support of Pilot School planning efforts

SkillWorks

SkillWorks is the single largest public/private investment in workforce development in Boston's history. Through these investments, SkillWorks seeks to change the way employers hire and promote entry-level workers from Boston's neighborhoods by promoting employer-driven partnerships with community training organizations. Funding partners include the City of Boston, the Commonwealth of Massachusetts and other local and national funders. These grants were made in 2007:

Action for Boston Community Development, \$330,000

Asian American Civic Association, \$330,000

Crittendon Women's Union, \$300,000

International Institute of Boston, \$249,885

Jamaica Plain Neighborhood Development Corp., \$250,000

Voice and Future Fund, Inc., \$330,000

Out of the Blue Grants

This special program makes unsolicited, unrestricted grants of \$75,000 to nonprofit organizations that have strong leadership, and engage in outstanding work. The goal is to advance priority work in sectors of major interest to the Boston Foundation and to provide timely support to highly effective organizations. All of these grants were from the Permanent Fund for Boston and made in 2007. This year's recipients were:

Black Ministerial Alliance of Greater Boston

For some 40 years, the Black Ministerial Alliance has worked with more than 80 faith-based and community-based organizations serving the Black community in Boston. Its mission is to provide spiritual nurture for clergy—and advocacy and program services for the community.

Charles River Conservancy

The Charles River Conservancy is a citizens' advocacy group founded in 2000 and dedicated to the renewal and stewardship of the Charles River Parklands—from the Boston Harbor to the Watertown Dam. The Conservancy works to make these parklands more attractive, active and accessible to all.

Huntington Theatre Company, Inc.

The Huntington Theatre Company, a nonprofit organization in residence at Boston University, has been Boston's leading professional theatre company for a quarter-century. During the past three seasons the company has experienced a period of artistic and institutional growth and added dynamic new performance spaces.

Strategies for Children

The mission of Strategies for Children is to improve the well being of children and their families through public policy, advocacy, constituency building and public awareness. It runs the Early Education for All Campaign, a coalition of leaders from all sectors working in partnership to ensure that every child has access to high-quality pre-kindergarten education and full school-day public kindergarten.

Boston Foundation Advisory Groups and Task Forces

In the Boston Foundation's continuing campaign to bring new voices and community expertise to its work, a number of special task forces and committees inform our work in the areas of arts and culture, education, the environment, housing, homelessness prevention, and workforce development. The Boston Indicators Project also has a convening group that guides its work and progress.

These groups vary in size and mission, but not in importance. As of the printing of this report, the following people were engaged in advising our work. We are grateful for their commitment of time, their experience, and their wisdom.

Advisory Committees

Arts and Culture Advisory Committee

Louis Casagrande, Ph.D., President, Boston Children's Museum, *Co-Chair*

Ann McQueen, Senior Program Officer, The Boston Foundation, *Co-Chair*

Jon Abbott, Executive Vice President, WGBH

Josh Basseches, Chief Operating Officer, Peabody Essex Museum

Rebecca Blunk, New England Foundation for the Arts

Roger H. Brown, President, Berklee College of Music

Sean Buffington, Associate Provost and Director of Cultural Programs, Harvard University

Julie Burns, Director, Mayor's Office of Arts, Tourism and Special Events

Barbara W. Grossman, Chair, Department of Drama and Dance, Tufts University

Dan Hunter, Executive Director, Massachusetts Advocates for the Arts Sciences and Humanities

Marty Jones, Executive Director, Celebrity Series

Mary Kelley, Director, Massachusetts Cultural Council

Mimi LaCamera, President, Freedom Trail Foundation

Michael Maso, Managing Director, Huntington Theatre Company

Charlie McDermott, Deputy Director, Massachusetts Cultural Council

Stella Aguirre McGregor, Executive Director, Cloud Foundation

Jill Medvedow, James Sachs Plaut Director, Institute of Contemporary Art

Ioannis Miaoulis, President and Director, Museum of Science

Beverly Morgan Welch, Executive Director, Museum of African American History

Margaret Morton, Vice President for Program, Fidelity Foundation

Amanda Northrop, Senior Officer, State Street Foundation

Richard Ortner, President, Boston Conservatory

Gioia Perugini, Program Officer, Select Client Services, Hemenway and Barnes

Jeff Poulos, Executive Director, StageSource

Malcom Rogers, Anne and Graham Gund Director, Museum of Fine Arts, Boston

Susan Rogerson, Executive Director, Artists for Humanity

Gil Rose, Artistic Director, Boston Modern Orchestra Project

Klare Shaw, Senior Associate, Barr Foundation

Candelaria Silva-Collins, Director, ACT Roxbury Consortium

Joe Spaulding, President and CEO, Citi Center for the Performing Arts

Julia Toulmin, Managing Director, Philanthropic Advisors LLC

Jason Weeks, Executive Director, Cambridge Arts Council

Valerie Wilder, Managing Director, Boston Ballet

Nina Zannieri, Executive Director, Paul Revere House

Education Advisory Committee

James Darr, Senior Fellow in Public Policy, The Boston Foundation, *Chair*

Spencer Blasdale, Chairman, Mass Charter School Association

Ann Coles, Project Director, Pathways to College Network

Paul Grogan, President and CEO, The Boston Foundation
Ellen Guiney, Executive Director, The Boston Plan for Excellence
Karen Mapp, Lecturer on Education, Harvard Graduate School of Education
Claudio Martinez, Executive Director, Hyde Square Task Force
Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs, The Boston Foundation
Caprice Taylor Mendez, Director, Boston Parents Organizing Network
Elizabeth Pauley, Senior Program Officer, The Boston Foundation
James Peyser, Partner, New Schools Venture Fund
Earl Martin Phalen, co-founder, BELL
Paul Reville, President, Rennie Center for Education Research and Policy
Jacqueline Rivers, Executive Director, Math Power, Northeastern School of Education
Klare Shaw, Senior Associate, The Barr Foundation
Miren Uriarte, M.D., Director, Gaston Institute, UMass Boston
Robert Wadsworth, Program Director, The Boston Foundation
Richard Ward, Director of Grantmaking, The Boston Foundation

Homelessness Prevention Advisory Committee

Allison Bauer, Senior Program Officer, The Boston Foundation, *Chair*
Robyn Alie, Manager, Massachusetts Medical Society and Alliance Charitable Foundation
Susanne Beaton, One Family Campaign Director, One Family, Inc.
Ed Sanders-Bey, Assistant Commissioner, Massachusetts Department of Transitional Assistance
Carol Collins, Director of Housing Management, Massachusetts Department of Housing and Community Development
Jennifer Day, Manager, Massachusetts Medical Society and Alliance Charitable Foundation
Elizabeth Doyle, Assistant Director for Housing Development, Department of Neighborhood Development, City of Boston
Joseph Finn, Executive Director, Massachusetts Housing and Shelter Alliance
Donna Haig Friedman, Ph.D., Director, Center for Social Policy Research, University of Massachusetts Boston
Robyn Frost, Executive Director, Massachusetts Coalition for the Homeless
James Greene, Emergency Shelter Commissioner, City of Boston
Julia Kehoe, Commissioner, Department of Transitional Assistance
Anne Marie Boursiquot King, Manager, Community Partnerships and Volunteerism, Tufts Health Plan

Margaret Leonard, Executive Director, Project Hope
Paul Nixon, Housing Management Specialist, Massachusetts Department of Housing and Community Development
Alison Rice, Director of Family Housing Services, Housing Assistance Corporation
Amy Schectman, Associate Director, Public Housing and Rental Assistance, Massachusetts Department of Housing and Community Development

Housing Advisory Committee

Eleanor White, President, Housing Partners, Inc., *Chair*
Amy Anthony, President, Housing Investments Inc.
Barry Bluestone, Director, The Center for Urban and Regional Policy, Northeastern University
Rachel Bratt, Professor, Department of Urban and Environmental Policy and Planning, Tufts University
Eva Clarke, Consultant
Larry Curtis, Managing Partner, Winn Development
Aaron Gornstein, Executive Director, Citizens Housing & Planning Association
Al Kaneb, The Barnstable Corporation
Mossik Hacobian, Executive Director, Urban Edge Development Corporation
Sandra Henriquez, Director, Boston Housing Authority
Langley Keyes, Professor of City and Regional Planning, Department of Urban Studies, MIT
Joe Kriesburg, President, Massachusetts Association of Community Development Corporations
Robert H. Kuehn, Jr., President, Keen Development Corporation
Alvaro Lima, Director of Research, Boston Redevelopment Authority
Joanne Massaro, Director of Operations, Department of Neighborhood Development, City of Boston
Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs, The Boston Foundation
Jeanne Pinado, Executive Director, Madison Park Community Development Corporation
Robert L. Pyne, Director of Rental Development, MassHousing
David Squire, Vice Chair, MassDevelopment
Kirk Sykes, New Boston Fund, Inc.
Sarah Young, Deputy Director for Policy Development, Department of Housing and Community Development
Robert Wadsworth, Program Director, The Boston Foundation

Task Forces Convened by the Boston Foundation

The Boston Foundation convenes task forces made up of community leaders from all sectors to tackle some of the most pressing challenges facing Greater Boston. Task forces are informed by research supported by the Boston Foundation and create action plans, often involving public policy initiatives, to make real progress for the people of this city and region.

Campaign for Cultural Facilities Task Force

Paul S. Grogan, President and CEO, The Boston Foundation, *Co-Chair*
Mary Kelley, Executive Director, Massachusetts Cultural Council, *Co-Chair*
Dan Hunter, Director, Massachusetts Advocates for the Arts, Sciences and Humanities, *Co-Chair*
Jonathan Abbott, Vice President and COO, WGBH Educational Foundation
Ozzie Alvarez, Boxcar Media & Williamstown Advocate
Robert Beal, President, The Beal Companies
Louis Casagrande, President, The Children's Museum
John Drew, President and CEO, World Trade Center and Seaport Hotel
Irene Browne Grimm
Julie Burns, Director, Boston Office of Arts, Tourism and Special Events
William T. Kennedy, Publisher, The Standard-Times
Kent Lucken, Vice President, The Citigroup Private Bank
Michael Maso, Managing Director, Huntington Theatre Company
Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs, The Boston Foundation
Jill Medvedow, James Sachs Plaut Director, Institute of Contemporary Art
Peter Nessen, Chairman, Nessen Associates, Ltd.
Dusty Rhodes, President, Conventures, Inc.
Dr. Robert Rosenthal, President and CEO, TekCel
Malcolm L. Sherman, Chairman, Gordon Brothers Group
Susan L. Solomont, Senior Fellow, The Philanthropic Initiative
Helen Spaulding, Former Chair, The Boston Foundation
David Starr, President, Springfield Republican
Joseph Thompson, Executive Director, MassMoCA
Kendall Wallace, Publisher, Lowell Sun
David Willard, Vice President, Cape Cod Five Cents Bank

Commonwealth Housing Task Force

Paul S. Grogan, President and CEO, The Boston Foundation, *Convener*
Lawrence S. DiCara, Partner, Nixon Peabody, *Co-Chair*
Robert Smyth, President, Citizens Bank, Massachusetts, *Co-Chair*
Jerry Rappaport, President, New Boston Fund, *Co-Chair*
Eleanor White, President, Housing Partners, Inc., *Co-Chair*

Executive Committee Members

Robert Beal, President, The Beal Companies
Barry Bluestone, Director, Center for Urban and Regional Policy, Northeastern University
Ted Carman, President, Concord Square Development Company
James Klocke, Executive Vice President, Greater Boston Chamber of Commerce
Mary Jo Meisner, Vice President for Communications, Public Relations and Community Affairs, The Boston Foundation

Task Force on CORI Employer Guidelines

Bob Gittens, Vice President of Public Affairs, Northeastern University, *Co-Chair*
Betsy Pattullo, President and CEO, Beacon Health Strategies LLC, *Co-Chair*
Sheriff Andrea Cabrall, Suffolk County Sheriff
Elyse Clawson, Executive Director, The Crime and Justice Institute
Tom Coury, Executive Director, Gardiner Howland Shaw Foundation
Marc Draisen, Executive Director, Metropolitan Area Planning Council
Len Engel, Criminal Justice Policy and Project Consultant, The Crime and Justice Institute
Haywood Fennell, Founder and President, Stanley Jones Clean Slate Project
Lewis Finfer, Massachusetts Community Action Network
Jim Hunt, President and CEO, Massachusetts League of Community Health Centers
Tom Jones, Former Vice President and Counsel, The Employers' Resource Group, Associated Industries of Massachusetts
Lori Kipnis, Human Resources Director, Boys and Girls Clubs of Boston
Larry Mayes, Chief of Human Services, Mayor's Office, City of Boston
Jack McDevitt, Director, Center for Criminal Justice Policy Research, Northeastern University
Bonnie Michelman, Director, Police, Security and Outside Services, Massachusetts General Hospital
Ben Thompson, Executive Director, STRIVE
Jennifer Vorse, Program Coordinator, The Boston Foundation
Richard Ward, Director of Grantmaking, The Boston Foundation
Michael Weekes, Executive Director, Massachusetts Council of Human Service Providers

The SkillWorks Funders Group

SkillWorks: Partners for a Productive Workforce, is a five-year, \$15 million partnership among 13 local and national foundations, the Commonwealth of Massachusetts and the City of Boston, which is coordinated by the Boston Foundation. The following members represent the funders that contribute to the largest workforce development initiative in Boston's history:

Angel H. Bermudez, Senior Director of Grantmaking and Special Projects,
The Boston Foundation, *Chair*

Ken Barnes, Deputy Director for Planning and Policy Development, Mayors' Office
of Jobs and Community Services

Sue Beaton, Director, One Family Campaign/Fireman Foundation

Angela Brown, Program Officer, The Hyams Foundation

Annie Chin-Louie, Director, Community Investments, United Way of Massachusetts Bay

Becky Cloutier, Program Associate, The Boston Foundation

Conny Doty, Executive Director, Mayor's Office of Jobs and Community Services

Sharon Driscoll, Vice President, Charitable Management Services, Bank of America
Private Bank

Jeffrey Hayward, Senior Vice President, Community Impact, United Way of
Massachusetts Bay and Merrimack Valley

Sallie Petrucci George, Program Officer, The Robert Wood Johnson Foundation

Bob Giloth, Director, Family Economic Success, The Annie E. Casey Foundation

Jennifer James, Undersecretary, Executive Office of Labor and Workforce Development
Massachusetts Department of Workforce Development

Melinda Marble, Executive Director, One Family Campaign/Fireman Foundation

Rowan Murphy, Program Consultant, The John Merck Fund

Amanda L. Northrop, Senior Officer, State Street Foundation

Jennifer Waldner, Assistant Vice President, State Street Foundation

Dan Singleton, Deputy Director of Adult Services, Mayor's Office of Jobs and
Community Services

Beth Smith, Executive Director, The Hyams Foundation

Christie Getto Young, Senior Director, Public Policy, United Way of Massachusetts Bay
and Merrimack Valley

The Boston Indicators Project Convening Groups

The Boston Foundation runs the Boston Indicators Project, in partnership with the City of Boston/Boston Redevelopment Authority and the Metropolitan Planning Council. The Project and its biennial reports and website (www.bostonindicators.org) measure progress across 10 sectors, which is informed by the following Convening Groups and their Co-Chairs. In some of the sectors, there are also subcommittees listed.

Civic Vitality

Plenary:

Sayra Pinto, Associate Vice President for Inclusion and Community Learning,
Mount Wachusett Community College

Electoral Politics:

Gibrán Rivera, Organizer, The Public Policy Institute

New Leadership:

Joel Barrera, Project Director, Commonwealth Legislative Seminar & Project Director,
Metro Mayors' Coalition

Patricia Neilson, Associate Director, Center for Collaborative Leadership, UMass-Boston

Race and Ethnicity:

Beverly Morgan-Welch, Executive Director, Museum of Afro-American History

Jeff Stone, Steering Committee Co-Chair, City-Wide Dialogues on Boston's Ethnic
and Racial Diversity

Social Capital:

David Crowley, President, Social Capital, Inc.

Sayra Pinto, Associate Vice President for Inclusion and Community Learning,
Mount Wachusett Community College

Volunteerism:

Patrice Keegan, Executive Director, Boston Cares

Sharon Reilly, Director of Community Relations, The Food Project

Cultural Life and the Arts

Bill Nigreen, Principal, Facilitation for Social Change

Candelaria Silva-Collins, Director, ACT Roxbury

Economy

Michael Goodman, Director of Economic & Public Policy Research, The Donahue Institute, UMass, and President, The New England Economic Partnership

Gail Snowden, Former Chief Financial Officer and Treasurer, The Boston Foundation

Education

Plenary:

Robert Giannino-Racine, Executive Director, ACCESS

Klare Shaw, Senior Associate, The Barr Foundation

Early Education:

Amy O'Leary, Field Director, Strategies for Children/Early Education for All Campaign

Marchelle Raynor, Program Director, Head Start

K-12:

Thabiti Brown, Academic Dean, Codman Academy

Suzanne Lee, Principal, Josiah Quincy School

Out-of-School Time:

Mariel Gonzales, Vice President, Boston After School and Beyond

Mia Roberts, Chief Operating Officer, Big Sister Association of Greater Boston

Community Colleges:

Mary Lassen, Former Executive Director, The Women's Union; Senior Fellow in Public Policy, The Boston Foundation

Sayra Pinto, Associate Vice President for Inclusion and Community Learning, Mount Wachusett College

Higher Education:

Robert V. Antonucci, Former Commissioner of Education, Commonwealth of Massachusetts; President Fitchburg State College

Jackie Jenkins-Scott, President, Wheelock College

Environment

Lois Adams, Chief of Pesticides, Toxics and Urban Programs, EPA New England

Valerie Burns, President, Boston Natural Areas Network

Vivien Li, Executive Director, The Boston Harbor Association

Housing

Plenary:

Barry Bluestone, Director, Center for Urban and Regional Policy, Northeastern University

Charlotte Golar-Richie, Chief and Director, Boston Department of Neighborhood Development

Affordable Housing:

Aaron Gornstein, Executive Director, Citizens' Housing and Planning Association

Jeanne Pinado, Executive Director, Madison Park Community Development Corporation

Housing Market:

Anthony Pangaro, Principal, Millennium Partners-Boston

Kirk Sykes, President, New Boston Urban Strategy America Fund

Smart Growth:

Kristina Egan, Executive Director, Massachusetts Smart Growth Alliance

Brad Swing, Director of Energy Polity, City of Boston

Eleanor White, President, Housing Partners, Inc.

Preservation/Expiring Use:

Charlotte Golar-Richie, Chief and Director, Boston Department of Neighborhood Development

Michael Godek, Executive Director, Massachusetts Community Economic Development Assistance Corporation

Health

Elmer Freeman, Executive Director, Center for Community Health Education, Research and Service

Debbie Klein-Walker, Principal Associate, Abt Associates

Public Safety

Jorge Martinez, Executive Director, Project RIGHT

Jack McDevitt, Associate Dean of Graduate Studies, Institute on Race and Justice, Northeastern University

Technology

Steve Gag, Technology Advisor, Mayor Thomas M. Menino's Office

Pat Toney, Programs & Development Specialist, The Timothy Smith Network

Transportation

Richard Dimino, President & CEO, A Better City

Vineet Gupta, Director of Policy and Planning, City of Boston Transportation Department

Stephanie Pollack, Senior Research Associate, Center for Urban and Regional Policy

Applying for a Grant

For more than 90 years, the Boston Foundation has been supporting Greater Boston's most effective nonprofit organizations and programs, as well as investing in new ideas and organizations as they take on the community's greatest contemporary challenges. The Foundation sees its grantees as essential partners in the task of creating a livable metropolitan area that is the center of innovation and opportunity.

The Boston Foundation helps organizations address barriers to equal opportunity, adapt to changing times and circumstances, and generate and implement innovative ideas and programs. In all of our

work, the Foundation has a particular concern about low-income communities and our community's disenfranchised residents.

The Board of Directors of the Boston Foundation has designated three areas of community life as strategic priorities that are particularly important to our city and region's competitiveness in a global economy: Education (including Out-of-School Time); Housing and Community Development (including Community Safety); and Workforce Development.

In addition, the Foundation makes grants in the following areas: Arts and Culture; Civic Engagement; Economic Development;

Program Department members
(from left): Rita Richardson, Robert Lewis Jr., Jennifer Vorse, Robert Wadsworth, Ann McQueen, Allison Bauer, Elizabeth Pauley, Andrew McDowell and Geeta Pradhan



Health and Human Services; the Nonprofit Sector; and the Urban Environment.

While most grantmaking activity falls within established focus areas and initiatives, the Boston Foundation is open to a wide range of requests for the support of innovative ideas and projects that further its mission.

For Greater Boston area nonprofit organizations, our primary grantmaking program is organized around Twice-Yearly Grants and Other Funding Opportunities. The Twice-Yearly Grants are supported by the Foundation's Discretionary Funds, which allow the Foundation the greatest degree of flexibility in grantmaking. They include the Permanent Fund for Boston (the largest unrestricted fund, contributed to by hundreds of generous donors since 1915), Named Funds (established to honor a special person or organization), and Field of Interest Funds, which focus on general areas of interest, such as health or education.

Program Department members
(from left): Corey Davis, Loh-Sze
Leung, Rebekah Cloutier, Angel
Bermudez, Andrea Martinez, Richard
Ward, Krista Manie and Paul Schimek

Who Can Apply?

The Boston Foundation welcomes Pre-Application Form submissions from organizations in the Greater Boston area that are tax exempt under section 501(c)(3) of the Internal Revenue Code. If an organization is new and not yet tax-exempt, it may submit an application with the assistance of a tax-exempt organization that has agreed to serve as a fiscal agent. The Pre-Application is a required first-stage process.

Geographic Scope

Organizations should visit www.tbf.org for a list of all of the cities and towns in which the Foundation funds projects and programs, although the Foundation will fund statewide advocacy or policy research when there is a strong connection with and influence upon its Greater Boston policy interests.



Types of Support

Generally, the Boston Foundation makes the following types of grants:

Program Grants: This is the most common type of grant made by the Boston Foundation. Funds are awarded for a specific activity or service, such as program development, project evaluation or advocacy.

Organizational Development Grants: Organizational development grants are made to build the excellence and management capacity of nonprofit organizations. These grants are sometimes referred to as “capacity building” grants.

Deadlines

Deadlines for Pre-Application Forms are July 1 and January 5. The Foundation will then invite full proposals from applicants whose work best advances the Foundation’s priorities and goals, notifying organizations on August 15 and February 15, with full proposals due on September 15 and March 15.

Other Funding Opportunities

The Boston Foundation plays a leadership role in developing focused initiatives in key areas where more intensive involvement has the potential for significant impact. Each initiative has its own funding guidelines and deadlines. The following list presents examples of several recent and current funding initiatives developed by the Boston Foundation, often in partnership with other funders. Please visit www.tbf.org to determine which initiatives are currently accepting proposals.

The Civic Engagement Initiative seeks to increase nonpartisan voter registration and mobilization in low-income communities and communities of color with low rates of voter participation by investing in community-based organizations that include voter registration activities as one component of their work.

SkillWorks: Partners for a Productive Workforce is a five-year, \$15 million partnership among a number of foundations and government, which makes large, multi-year grants to substantially improve workforce development services for both disadvantaged job and skill seekers and businesses.

The Summer Safety Funder Collaborative makes grants to expand services that engage high-risk youth aged 12 to 20 in Boston neighborhoods disproportionately impacted by community violence. The project is a collaboration among the Boston Foundation, the United Way and several other funders.

The Vision Fund provides grants of up to \$5,000 to organizations that advance the Boston Foundation’s strategic priorities. Grants are for discreet projects with budgets under \$10,000 that are designed to strengthen the organization’s capacity, help it connect to constituents, and other activities.

The Youth Policy Initiative seeks to build the capacity of Boston-area youth-serving organizations to impact policies which advance positive educational, social and workforce outcomes for youth, and build a robust network of organizations and collaborations working to develop, articulate and implement a shared advocacy agenda.

Please Visit www.tbf.org Before Applying

Those organizations interested in applying for funding are strongly encouraged to visit our website at www.tbf.org, where extensive information is available about every aspect of the Boston Foundation’s grantmaking process. The website contains the on-line *Pre-Application Form*, information about the highest funding priorities in each of the Foundation’s grantmaking sectors, and priorities for specific populations. Interested organizations may also call the Foundation at (617) 338-1700 for more information.

Establishing a Fund

Boston Foundation donors are young high tech professionals and retired senior citizens, volunteers and executives at major corporations, bankers, artists, doctors, venture capitalists, lawyers and teachers. Although our donors may be different from each other, they do have one thing in common. They believe in the power of community—and of giving—to add meaning to their lives.

They also want their philanthropy to have a real impact on the areas of life they care about most—and they know that the Boston

Foundation can help them to do just that. Donors are offered a wide variety of fund options to meet their needs—from flexible funds that can be used by the Foundation’s staff and board to benefit the Greater Boston community, to Donor Advised Funds that actively engage donors in the giving process.

It’s quick and easy to establish a fund at the Boston Foundation—even if gifts are complicated, such as those of restricted stock or real estate. And all donors have access to the Foundation’s Understanding Boston series of publications, forums and other civic leadership activities, which focus on the most serious challenges facing Greater Boston and the region in today’s global economy.

Endowing Boston

To benefit this community, now and for future generations, many Boston Foundation donors choose to establish a charitable legacy that will carry their name and interests in perpetuity. Donors can choose from three basic types of funds.

The Permanent Fund for Boston

A gift to Greater Boston’s primary endowment, the Permanent Fund for Boston, can be made with confidence that it will always be used to meet the most urgent needs facing our community. Grants from this fund are awarded through a process that is led by professionals who have a deep understanding of Greater Boston. Gifts can be named for permanent recognition in all Boston Foundation publications.

Field of Interest Funds

By establishing a Field of Interest Fund, donors can focus their gift on the area of community life that they care about most—such as promoting excellence in education along all points on the opportu-

Development Department members from left: Nicole Devlin, Dana Turpie, Kristen Jilek, Tara Henry and Ruben Orduña



nity pipeline, addressing the health care needs of our community's neediest people, or supporting arts and culture.

Designated Funds

A Designated Fund allows donors to provide annual support to organizations in Greater Boston or across the United States that have made a difference in their lives and the lives of loved ones.

The Civic Leadership Fund at the Boston Foundation

The Civic Leadership Fund fuels the 'beyond grantmaking' work of the Boston Foundation—including commissioning and publishing fresh research on issues that are challenging Greater Boston, bringing people together to exchange information and ideas, encouraging cross-sector partnerships, and creating action plans for change in areas like affordable housing, workforce development and education. In 2007, the Civic Leadership Fund raised more than \$1 million (see page 55 for a list of donors to the Fund).

Donor Advised Funds

Donor Advised Funds operate much like private foundations, but without the administrative burdens or paperwork. Donors are able to make contributions to nonprofit organizations anywhere in the United States—even internationally. And, for those who want some assistance with their giving, Boston Foundation donors have access to a knowledgeable and experienced staff that can help guide their giving as little or as much as they would like.

The Many Ways of Giving

Donors can work with the Boston Foundation to maximize their financial opportunities for themselves, their heirs—and the charitable causes they care about most. The Boston Foundation offers a full range of ways of giving:

Cash Contributions

Cash is the easiest way to establish a fund or add to an existing fund.

Gifts of Appreciated Assets

Stocks and bonds, including restricted stock, pre-IPO stock, mutual funds, certain closely-held stock and readily marketable real estate—a wide variety of assets may be used to establish a fund, add to a fund or create a planned or legacy gift.

Assets from a Private Foundation

A private foundation can make a grant to any fund at the Boston Foundation or transfer its assets to a Donor Advised Fund and ease the administrative burden—with the option of co-investing with the Boston Foundation on local grants.

Planned and Legacy Giving

The Boston Foundation offers many creative ways to incorporate charitable giving into estate planning. Planned and legacy giving is an excellent way to establish a charitable legacy, while realizing significant financial and tax benefits. These are the basic options.

- › Gifts by Will or Trust
- › Gifts of Retirement Plan Assets and Life Insurance
- › Gifts That Pay an Income
- › Gifts That Preserve Assets for Heirs

Philanthropic and Donor Services

An entire department at the Boston Foundation is dedicated to working with donors to make their philanthropy as effective and fulfilling as possible. Staff members help donors identify organizations and programs that will benefit most from their support and offer opportunities to 'co-invest' in effective and timely programs already receiving grants from the Foundation. Donors receive a special newsletter, are invited to briefings on topics of current interest with leaders in the field—and given the opportunity to become involved on a series of levels with the civic leadership work of the Foundation.

Renewing The Permanent Fund for Boston

This year the Boston Foundation renewed its commitment to building the Permanent Fund for Boston, which serves as a virtual endowment for the community of Greater Boston. This special fund historically has received significant support from bequests and gifts from Boston Foundation donors with Donor Advised Funds and many others who care deeply about this community and want to see it thrive. It provides the largest pool of unrestricted resources the Foundation has to respond to the most urgent needs facing Greater Boston in contemporary times.

Over the years, these are the resources that have allowed the Foundation to be “There at the Beginning” for so many of the best new organizations and ideas in Greater Boston’s



history—from the founding of WGBH to the clean-up of the Boston Harbor to the birth of the Boston Children’s Chorus.

Today, the Foundation relies on the Permanent Fund for Boston for its competitive grantmaking, which responds to requests from Greater Boston’s most effective and innovative nonprofit organizations—and focuses on every important area of community life. For informa-

tion about how to contribute to this important fund, call the Development Office at 617-338-1700 or visit www.tbf.org and choose Giving.

Advantages of Partnering with the Boston Foundation

Like many other excellent gift fund services, the Boston Foundation offers:

- › Simplicity and speed in opening and maintaining a fund;
- › Maximum tax benefits;
- › Online grantmaking and fund services;
- › Investment expertise and enhanced investment returns; and
- › Anonymity.

The Boston Foundation also provides our donors with so much more:

- › Personalized philanthropic and donor services, with a staff ready to meet donors’ needs and answer all of their questions about grantmaking;
- › Experts in all of the major areas of community life in Greater Boston and across the country;
- › Invitations to Understanding Boston forums and access to leading-edge research about our community;
- › A full range of planned and legacy giving opportunities; and
- › Connection to an ‘extended family’ of donors and civic leaders who are dedicated to making Greater Boston as great as it can be.

And the Foundation works closely with private foundations:

- › Helping private foundations increase their impact by identifying nonprofit organizations that are doing stellar work in the areas of community life they care about most; and
- › Assisting members of families with private foundations to identify new and exciting programs to meet their annual payout requirements.

For more information about establishing a fund 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 and choose Giving.

Boston Foundation Funds

Hundreds of individuals, families and companies have immeasurably strengthened the Greater Boston community by establishing and contributing to funds at the Boston Foundation. Many of our donors work closely with our Philanthropic and Donor Services staff to enhance their giving— and an ever-growing number take advantage of planned and legacy giving opportunities. The following pages list all funds 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.

Philanthropic and Donor Services Department members from left: Amy Park Appleby, Kate Guedj, Megan O’Toole, Jenna Smith Gomes and Diane Elenbaas.



New Donors to the Permanent Fund for Boston

Donors to the Permanent Fund for Boston want to address the needs the people of Greater Boston have today—and give the Boston Foundation the resources to meet future needs as well. We are grateful to these new donors for their contributions to this important unrestricted fund.

Individuals, Charitable Funds, Corporations and Foundations

Anonymous Donor
Association of the Pupils of J. Thomas Black, C.S.B.
Mekayla Beaver
Chester County Community Foundation, Inc.
Mr. Brian Hyde and Mr. Joe Fiorello
Institute for Affirmative Action

Mr. Stephen P. Jonas
Maragaret Mack and John Powell
David and Mary Ellen Moir
NAIOP
Network for Good
Francis Ward Paine Foundation, Inc.
Ms. Pamela M. Smith
Strategy One, Inc.

Wilbert G. and Eunice Muttart Foundation
Ms. Hungwah Yu and Mr. David J. Elliott

Estates & Trusts

Donald Gregg Trust u/Will
Estate of Elizabeth B. Hough
Katherine B. Hood Trust
Mason Charitable Reminder Annuity Trust

54 New Funds Were Established in 2007

We gratefully acknowledge the generous community-minded people who established new funds at the Boston Foundation during 2007. The following list includes Discretionary Funds, Designated Funds and Donor Advised Funds.

Discretionary Funds

David W. Cushing Fund

Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund

Designated Funds

Achieving the Dream Initiative Fund

High-Risk Youth Fund

Initiative for Diversity in Civic Leadership Fund

John Larkin Thompson Fund

Wallace Foundation Fund

Ernesto "Tito" Whittington Scholarship Fund

Donor Advised Funds

James F. Alenson Memorial Fund

Selma and Bayness Andrews Fund

Jim Apteker Fund

Ayasli Fund

Cabot Family Charitable Trust Fund

Alice F. Casey Fund

CJE Foundation Fund

Deshpande Donor Advised Fund

Dintersmith-Hazard Foundation Fund

Dodson Family Charitable Fund

Dupre-Nunnally Charitable Gift Fund

Egozy Fund

Emerging Leaders Fund

Giving Three Fund

Grunebaum Charitable Fund

Margaret Hixon Fund

Cynthia & Andrew Janower Charitable Fund

Elizabeth Trichel Joyce Family Fund

Martin & Wendy Kaplan Fund

Ronni Sachs Kotler Family Fund

Joseph and Lisa Krivickas Family Fund

Joseph and Lisa Krivickas Family Fund II

John Lowell Lyman & Cynthia Forbes Lyman Fund

Jack and Beth Meyer Foundation Fund

Moose and Squirrel Fund

Mormann Family Fund

Paul F. Nagle Memorial Fund

Nicholas Novotny Fund

Kathryn Novotny Fund

O'Brien Family Fund

Thomas J. O'Neil Memorial Fund

Donald and Frances Putnoi Charitable Fund

Richard E. & Mary F. Rafferty Fund

Salmon Family Charitable Fund

Douglas Boyd Sharpe Donor Advised Fund

John and Susan Simon Boston Foundation Fund

Lawrence and Lillian Solomon Fund

Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund

Dola Hamilton Stemberg Fund

Congressman Gerry E. Studds Fund

Tye Charitable Fund

Nancy J. Vickers Fund

Wellesley Hills Congregational Church Outreach Fund

Whitehead – Sayare Fund

Zwanziger Fund

Support Organizations

Deshpande Foundation

Donors to the Civic Leadership Fund

This fund provides the fuel for the Boston Foundation’s highly effective civic leadership activities, including commissioning fresh research into important areas of community life, producing leading edge reports based on the research, convening groups of people to discuss new information and ideas, and forming task forces to create agendas for positive change in our city and region.

A. W. Perry, Inc.

Abt Associates

Carol and Howard Anderson Family Fund at the Boston Foundation

Anonymous donors (4)

BayNorth Capital, LLC

Beacon Capital Partners

Mr. Robert L. Beal

Dr. James and Mrs. Susan Beck

Bilezikian Family Foundation

Mr. Mark Blaxhill

Blue Cross Blue Shield of Massachusetts

Joan T. Bok Fund at the Boston Foundation

The Boston Company Asset Management, LLC

Boston Culinary Group, Inc.

Boston Globe

Boston Herald

Boston Private Bank & Trust Company

The Boston Red Sox Foundation

Mr. Ian and Mrs. Hannah Bowles

Mr. and Mrs. F. Gorham Brigham, Jr.

Peter A. Brooke Fund at the Boston Foundation

Lord-Buck Fund at the Boston Foundation

Bill and Barbara Burgess Fund at the Boston Foundation

William T. Burgin Fund at the Boston Foundation

Butler’s Hole Fund at the Boston Foundation

Ms. Meg Campbell

Dr. Louis and Mrs. Julie Casagrande

Catherine and Paul Bittenwieser Foundation

Mr. Gerald and Mrs. Kate Chertavian

The Chiofaro Company

Citizens Bank Foundation

Citizens Financial Group, Inc.

Mr. John H. Clymer

Mr. Ferdinand Colloredo-Mansfeld

Mr. John M. Connors, Jr.

Mr. Lawrence Coolidge

Cooper Leaser Family Fund at the Boston Foundation

Constance and Lewis Counts Fund at the Boston Foundation

CCI/Crosby Publishing

Mr. and Mrs. John J. Cullinane

Ms. Catherine D’Amato

Dammann Boston Fund at the Boston Foundation

Mr. Andre and Mrs. Marilyn Danesh

Mr. Richard S. Davis

Davis Marcus Partners

Mr. Edward and Mrs. Paula DeMore

Denterlein Worldwide

DeWolfe Family Fund at the Boston Foundation

Mr. Timothy and Mrs. Maureen Dibble

Lawrence S. DiCara, Esq.

Mr. James and Mrs. Janice DiStasio

Mr. Ralph J. Donofrio

Mr. John and Mrs. Kathleen Drew

Druker Company, Ltd.

Eastern Bank Charitable Foundation

Eaton Vance Management

Mr. William S. Edgerly

Eisenson Family Fund at the Boston Foundation

David W. Ellis Revocable Trust

Mr. Ronald E. Feldman

Mr. Tim and Mrs. Corinne Ferguson

Paul and Phyllis Fireman Charitable Foundation

Fish Family Foundation

Drs. Robert H. and Rochelle R. Friedman

Ms. Susan Y. Friedman

Fulkerson Family Fund at the Boston Foundation

Gabrieli Family Fund at the Boston Foundation

Mr. Richard C. Garrison

Gillette Company

Carol R. & Avram J. Goldberg Fund at the Boston Foundation

Rachael P. & Andrew P. Goldfarb Fund at the Boston Foundation

Gordon Educational Fund at the Boston Foundation

Mr. Roger C. Greene

Mr. Paul S. Grogan

Steven and Barbara W. Grossman

H.N. Gorin, Inc.

Mrs. Hope C. Groves

Dr. Thierry and Mrs. Kate Guedj
Mr. Paul Guzzi
Hale and Dorr Capital Management LLC
Rev. Ray Hammond and Dr. Gloria Hammond
Harvard Pilgrim Health Care
Petie Hilsinger Fund at the Boston Foundation
Mr. Thomas and Mrs. Diane Hollister
Mr. Brian Hyde and Mr. Joe Fiorello
Income Research & Management
Mr. Ira A. Jackson
Mrs. Joanna M. Jacobson
Ms. Jackie L. Jenkins-Scott
John Hancock Life Insurance Company
Jeffrey F. Jones, Esq.
Mr. Tripp and Mrs. Robin Jones
Albert J. & Diane E. Kaneb Family Fund II at the Boston Foundation
Albert J. & Diane E. Kaneb Family Fund II at the Boston Foundation
Martin S. Kaplan, Esq.
Karp Family Foundation
Mr. Brian H. Kavogian
Michael B. Keating, Esq.
Senator Edward Kennedy and Mrs. Victoria Reggie
Mr. William and Mrs. AnnMarie Kennedy
Keyspan Energy Delivery
Mr. Peter Carter Knight and Mrs. Deborah Sanford Knight
KPMG, LLP
The Robert & Myra Kraft Family Foundation, Inc.
Kravitz Family Fund at the Boston Foundation
Mr. Paul A. and Mrs. Mary E. La Camera
G. Barrie Landry Fund at the Boston Foundation

Barbara Lee Family Foundation Fund at the Boston Foundation
Edward P. Leibensperger, Esq.
Liberty Mutual Foundation, Inc.
Linde Family Foundation
Loomis Sayles & Company, Inc.
Louise Crane Foundation
Lovett-Woodsum Family Fund at the Boston Foundation
LMG Fund at the Boston Foundation
Mr. Martin and Mrs. Tristin Mannion
Sydell and Edward I. Masterman Fund at the Boston Foundation
Ms. Lisa K. Matthews
Mr. Jim and Mrs. Glenda Manzi
Mr. Kevin McCall
W. Shaw McDermott, Esq.
Emily & Bernard Mehlman Fund at the Boston Foundation
Ms. Mary Jo Meisner
Meredith & Grew, Inc.
Mr. Robert T. P. Metcalf
Mr. Jack R. Meyer
MDA Partners LLC
Mill River Foundation Fund at the Boston Foundation
Moran Family Charitable Foundation
Mr. Herbert E. Morse
Brian Moynihan & Susan Berry Charitable Fund
Muddy Pond Trust Fund at the Boston Foundation
David G. Mugar Fund at the Boston Foundation
Tami E. Nason & Kent A. Lage Fund at the Boston Foundation
Scott A. Nathan Fund at the Boston Foundation
National Development

New Boston Fund, Inc.
New England Cable News
Northern Trust Bank
Mr. and Mrs. Kenneth J. Novack
Novotny/Swahnberg Fund at the Boston Foundation
Mr. Mark E. Nunnally and Ms. Denise M. Dupre
Obermayer Foundation, Inc.
Mr. Thomas L.P. O'Donnell
Mr. Ronald P. O'Hanley
O'Neill & Associates
Mr. Ruben D. Orduna and Ms. Elizabeth G. Hill
Parker Family Fund at the Boston Foundation
Partners Healthcare
Mr. Thomas Payzant
Dainger Fund at the Boston Foundation
Mr. Lovett C. Peters
Mr. Kevin C. Phelan
Mr. Michael E. Porter
PricewaterhouseCoopers
Prime, Buchholz and Associates, Inc.
Pzena Investment Management, LLC
The Irving and Charlotte Rabb Charitable Foundation
Raytheon Company
Relational Investors, LLC
Remmer-Fox Family Fund at the Boston Foundation
Hanson S. Reynolds, Esq.
Riptide Fund at the Boston Foundation
Rodgers Community Fund at the Boston Foundation
Mr. Sumner Rodman
Rutabaga Capital Management
Mr. William Schawbel
Ms. Helen Chin Schlichte

The Schoen Family Foundation
Mr. David W. Scudder
Sherman Family Foundation Fund at the Boston Foundation
Mr. John G. Simon
Richard & Susan Smith Family Foundation
Snowden - Trimmier Family Fund at the Boston Foundation
Alan D. and Susan Lewis Solomont Family Foundation
Sovereign Bank
Mrs. Helen Spaulding

Stephanie H & David A Spina Family Foundation
Mr. Alan and Mrs. Mary Spitzer
Ms. Micho F. Spring
David F. Squire Family Fund at the Boston Foundation
State Street Global Advisors
Stone Charitable Fund at the Boston Foundation
Matthew J. & Gilda F. Strazzula Foundation
John Larkin Thompson – PerkinElmer Directors Charitable Program
Mr. Peter and Mrs. Laurie Thomsen

Mr. Gregory Torres and Ms. Elizabeth Pattullo
Senate President Robert E. Travaglini
Ms. Elaine Ullian
Wainwright Bank
Mr. William J. Walczak
Mr. Robert W. Weinstein
Ms. Benaree P. Wiley
Ms. Hungwah Yu and Mr. David J. Elliott
Zabin Charitable Fund at the Boston Foundation

Planned and Legacy Gifts Received

Many donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad range of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, and gifts of retirement plan assets and life insurance. During Fiscal Year 2007, close to \$14 million in planned and legacy gifts were received from the following, which are gratefully acknowledged.

Estate of Emily Tuckerman Allen
Estate of Samuel Bayness Andrews
Estate of David Avison
Estate of Allen Barry
Estate of Robert Bass
Estate of A. Page Browne, Jr.
The Cynthia B. Browning 1992 Trust
Franklin S. Browning, Jr. 1992 Trust
Margaret A. Bush Charitable Gift Annuity
Estate of Mary C. Farr

Americo J. Francisco Charitable Trust
Francisco Realty Trust
Estate of Donald Gregg
Estate of Anne Hollingsworth
Estate of Katherine B. Hood
Estate of Elizabeth B. Hough
Estate of Samuel Lamar Jordan
Thomas F. Lambert Marital Trust
Mason Charitable Remainder Annuity Trust
Harold Whitworth Pierce Charitable Trust

Estate of Mary Louise Schaffner
Binkley C. Shorts Charitable Gift Annuity
Binkley C. and Paula F. Shorts Charitable Lead Annuity Trust
Estate of Esther G. Stoddard
Estate of Robert Storer
Estate of John Larkin Thompson – PerkinElmer Directors Charitable Program

Rogerson Legacy Society

Named for the 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 enduring legacy to ensure the future strength and vitality of our community.

Peter Aldrich	Elizabeth D. Coxe	Marjorie Howard-Jones	Donald M. Morse	David F. Squire
Howard and Carol Anderson	Diane Currie	Richard O. Howe*	Frederick W. Neinas, M.D.	Thomas W. Stephenson
Diane DeSerras Arenella	Elizabeth T. Damon	Muriel Hurovitz	Mary Greene Nelson	Ellen Stillman
David B. Arnold and Dorothy Q. Arnold	Marilyn Darling	Brian Hyde and Joe Fiorello	Mark A. and Judith A. Osborne	Anne B. Stone
Mrs. John Atkinson	David S. and Mrs. Shirley G. Dayton	Jane Wegscheider Hyman	Jennifer Jossie Owens	Congressman Gerry E. Studds* and Dean T. Hara
Geoffrey D. Austrian	Lucy S. Dillon	Donald G. Irving	Nancy E. Peace	John Larkin Thompson, Esq.*
Theodore S. Bacon, Jr.	Joy G. Dryfoos	Stephen G. and Rosemarie Torres Johnson	Drs. Robert A. and Veronica S. Petersen	Libby and Sidney Topol
Sherwood E. Bain	Malcolm Dunkley	Helen M. Jones	Agatha W. Poor	Alan and Pamela Trefler
Mary Barber	Anita Maria Elliott	Karen Joyce and John Fitzgerald	Nathaniel Pulsifer	David F. Tuttle, Jr.
Doreen Biebusch	Marian M. Ferguson	Ms. Ruth G. Kahn	Glendora M. Putnam	Jean-Paul and Rebecca Valette
Thomas W. Bird	June M. Ficker	Mr. Andrew M. Kamarck	Irving W. Rabb and Charlotte F. Rabb*	Joy E. Van Buskirk
Beryl H. Black	Edward S. Fleming	Gary P. Kearney, M.D. and Susan Kearney	Warren Radtke and Judith Lockhart Radtke	Robert R. Wadsworth and Catherine E. Moritz
David Blot	Walter Eugene Geier	Vera Kilstein	Richard L. Robbins	Henry Walter*
Kenneth S. Brock	Robert J. Glaser, M.D.	Peter and Stephanie Kurzina	Sumner and Helen Rodman	J. H. Walton, Jr. and Carolyn Walton
Seth N. Brockway	Harriet E. Glover	Frances J. Lee-Vandell	Eleanor L. Ross	Gordon Weil, Jr.
Jacob F. and Barbara C. Brown	Sandra and Philip Gordon	Carol F. Levin	Jordan S. Ruboy, M.D.	Inge J. Wetzstein
Beryl H. Bunker	Samuel A.* and Pauline S. Groves*	John H. Livens	John A. Russell	Elizabeth A. Wheeler
George E. Burden	Kate and Thierry Guedj	Dunbar Lockwood, Jr.	Beverly H. Ryburn	Stetson Whitcher*
The Hon. Nonnie S. Burnes and Richard M. Burnes, Jr.	Thomas Hale	Hugo Logemann, Jr.*	Anthony Mitchell Sammarco	Constance V. R. White
Margaret A. Bush	Charlotte I. Hall	Donald J. & Susan Kelley MacDonald	Mary L. Schaffner*	Michael N. and Mary M. Wood
Frank and Ruth Butler	Mrs. Chester Hamilton	Mary Madden	Margaret M. Schmidt	Eleanor D. Young
Robert B. Canterbury	Marilyn L. Harris	Myron and Barbara Markell	Ruth Gessner Schocken	Anonymous Society Members = 64
Helen T. W. Chen and Keith R. Ohmart	Barbara Hauter Woodward	Robert and Poppy Mastrovita	Charles R. Schroeder	
Penny and Ed Cherubino	Ann S. Higgins	Alice McGrath	Annabelle W. Shepherd	
Arthur D. Clarke	Petie Hilsinger	Edward J. and Jane S. Michon	Binkley and Paula Shorts	
Margaret J. Clowes	Kenneth D. and Cynthia L. Holberger	Joseph M. Miller, M.D.	Ellen L. Simons	
Frances F. Connelly	Chuck and Gayle Holland	Robert Minnocci	Cheryl H. Smith	
Constance Counts	Helen R. Homans	Charles Fessenden Morse	William F. Spang	

*Deceased

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

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 Greater Boston today. The following list includes donors who have made gifts totaling more than \$5,000 to the this fund, with the year of their first contribution noted in parentheses.

Individuals, Corporations and Foundations

Anonymous (2004)
Mr. and Mrs. Peter Brooke (1994)
The Boston Company (1991)
Henry Burkhardt, III (1986)
Catherine and Paul Bittenwieser 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)
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)
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)
Dr. W. Davies Sohier, 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)

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. Clafin (1992)
William H. Clafin (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)
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)
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)
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)
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. (Note: Those funds with asterisks received contributions in 2007, and are gratefully acknowledged.)

Adams, Harkness & Hill Fund (1984) unrestricted

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) unrestricted

*Anonymous Fund (1987) unrestricted

*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, the MassDev 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 that promote

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

Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund

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

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 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) unrestricted

Emily Budd Fund (1960) for fresh air vacations for underprivileged children



Administrative Services Department members (from left):
Work Study Student Xavier Soto from North Cambridge Catholic
High School, Lauren Baker, Julia Goring and Anna Gallo

- 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 (2007) for such 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, especially charities outside of Boston
- 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
- 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 (formally known as 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 & Natural Areas (1994)
- Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society
- Hollis D. Leverett Memorial Fund (1994) for the planting and upkeep of trees that protect and encourage wild bird life
- Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts
- Edward Glines Fund (1938) unrestricted
- 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 home
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- 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 (2007), 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
- 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, non-profit radio and television stations) providing musical program

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

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 desi

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

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 that respond to some of the most pressing challenges facing our community in innovative ways. (Note: Those funds with asterisks received contributions in 2007, and are gratefully acknowledged.)

*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

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

Arts Service Organization Fund (2003) for grants to art service organizations

Boston Community Building Network (1987) for development projects dedicated to reducing persistent poverty in Boston

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

*Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings

*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

Community Safety Fund (2002) to reduce the rate of violent crime in Boston after years of unprecedented success during the 1990's

*EdVestors Fund (2002) an initiative to educate potential donors about urban school reform issues and to interest them in selected innovative educational projects and programs in Eastern Massachusetts

- *EdVestors Collaborative Fund (2003) for nonprofit-school partnerships that enable schools and teachers to achieve their instructional goals
- *English for New Bostonians Fund (2000) for support of the 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
- *Initiative for Diversity in Civic Leadership (2007) to for a program to recruit, mentor and train people for public service
- 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
- Pilot Schools Project Fund (2002) for grants under the Foundation's Pilot Schools Initiative
- Polaroid Fund (1997) to help children and adults become more independent and realized 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
- *Summer Safety Funders Collaborative (2006) to enable non-profit organizations to expand services and effectively engage high-risk and disengaged teens ages 12-20 in Boston neighborhoods disproportionately impacted by community violence
- Teen Initiative Best Practices Fund (2005) to recognize best practices in teen programming
- *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 in perpetuity. Through these funds, many nonprofit institutions receive crucial annual support. The year the fund was established is listed in parentheses. (Note: Those funds with asterisks received contributions in 2007, and are gratefully acknowledged.)

Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston	Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association	Charles T. Burke Fund for the Watertown Free Public Library (1994) for the Watertown Free Public Library
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	Boston Baroque Fund (2003) for general operating support of Boston Baroque	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
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	Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.	James F. Casey Fund (1949) for seven named agencies
Allied Health Fund (2006) for the Allied Health Worker Initiative	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	Alex Castoldi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students
Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Foundation	Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College	Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose
Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals	BPE/ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation	*Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy
Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs	Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation	Philip P. Chase Fund (1955) for five named agencies
*Arts Awareness Fund (2005) to connect visual artists to opportunities to serve our community's social service agencies and other constituents	BPE/MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation	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
Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston	BPE/Support for Early Educational Development Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation, Inc.	Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted
Lilian G. Bates Fund (1951) for three named agencies	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	*City to City Fund (2005) for the City to City program
Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts	Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition	English High School Class of 1934 Award Fund (1994) 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
Boston Ballet-E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet	Charles T. Burke Fund for the Watertown Boys and Girls Club (1994) for the Boys and Girls Club of Watertown, Inc.	*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
- *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
- 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
- The English High School-John P. Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School
- 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
- Felix Fox Memorial Fund (1974) for the Community Music Center of Boston
- Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy
- General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Public Schools Foundation, Inc.
- 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
- Patricia Jellinek Hallowell Fund (1992) for support of the Patricia Jellinek Hallowell 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
- 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
- Jamaica Plain Open Studios Fund (2002) for support of the Jamaica Plain Arts Council
- 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
- 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
- Joe Alex Morris, Jr. Memorial Lectureship Fund (1982) income to be paid to the Neiman Foundation for Journalism at Harvard University
- Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency

- Harry D. Neary Fund (1950) for five named agencies
- 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 in Recognition of Retired Managing Partners Robert S. Cummings Scholarship Fund (1997) 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) to support the Home Funder's program
- 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
- Stephen D. Paine Scholarship Fund (1999) scholarship recipients to be determined by a Massachusetts Cultural Council jury process
- 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 (2006) to support the Pipeline to Public Service project
- Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors
- 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
- 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
- Stephen A. Stone Scholarship Fund (2002) Income will be distributed annually to Wareham High School in Wareham, Massachusetts
- Sybil F. Stone Arts Scholarship Fund (2005) for the Sybil F. Stone Scholarship to be awarded to a rising senior with a high portfolio review rating and high level of financial need for senior year tuition reduction
- 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
- 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
- *John Larkin Thompson Fund (2007) for fifteen named organizations
- 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
- 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) for scholarships to high school students to participate in the social justice programs for youth at the Boston Center for Community and Justice
- 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

Donor Advised Funds

The following is a list of all Donor Advised Funds established by people who choose to be actively involved in the grantmaking process. The year the fund was established is listed in parentheses. (Note: Those funds with asterisks received contributions in 2007. We are grateful to the many donors who have chosen to add to their funds this year.)

A.L.S. Fund (2002)	*Harry Ankeles Scholarship Fund (1992) scholarships for students from Peabody who will graduate from a high school located in Peabody who are seeking undergraduate degrees from accredited colleges or universities	*Baupost Group Charitable Fund (2004)
*AADS Memorial Fund (2004)		*Bechler Canyon Fund (2001)
Walter and Alice Abrams Family Fund (2005)		Bellevue Fund (1999)
Maida & George Abrams Fund (1985)		William D. & Mary E. Benjes Fund (1984)
*Abromowitz/Ruttenberg Family Fund (2000)	*Anony Fund (1998)	Jane Bernstein Fund (2006)
*Acacia Fund (2004)	Anonymous Fund IV (1995)	*Charlotte Saltonstall Bigham Memorial Fund (2004)
Ad Club Foundation Fund (1987)	Ansara Family Fund (2006)	*Bird Fund (1999)
*Adler Family Fund (2006)	*Anthos Family Fund (2004)	Bitpipe Legacy Fund (2004)
*Adopt-A-Statue Endowment Fund (1988)	*Anthropologists' Fund for Urgent Anthropological Research (1996)	*Linda Cabot Black Fund (1983)
Affinity Services Corporation Fund (2003)	*Jim Apteker Fund (2007)	*NICSA/William T. Blackwell Scholarship Fund (1995)
Agatha Fund (2004)	Arba Lifnot Boker Fund (1992)	Emmanuel and Jane Blitz Fund (1992)
Alchemy Arts Fund (1993)	*Atalaya Fund (2004)	*Tom and Lisa Blumenthal Family Foundation Fund (2005)
Richard and Kimberlee Alemian Fund (1996)	*Atlantic Fund (1997)	Joan T. Bok Fund (1997)
*James F. Alenson Memorial Fund (2007)	*Ausschnitt Fund (2004)	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
*Aliad Fund (1993)	*Avery Family Fund (2003)	*Boston Foundation Pooled Income Distribution Fund (1992)
*Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)	*Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)	Boston Foundation Real Estate Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)	*Ayasli Fund (2007)	BPE/Bank of Boston 200th Anniversary Fund (1982) for support of the Boston Plan for Excellence in the Public Schools Foundation
Dwight & Stella Allison Fund (1982)	Katharine & George Baker Fund (1987)	Sally and Joseph Braunstein Charitable Fund (2005)
*Alper Family Fund (1995)	Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)	Braverman Family Fund (1992)
*Altamira Fund (1994)	Richard Balzer Fund (2004)	*Francis J. Bresnahan Educational Scholarship Fund (1986)
George and Nedda Anders Fund (1991)	BANT Fund (1986)	*Bronner Fund (2006)
*Carol and Howard Anderson Family Fund (1997)	John & Judith Barber Fund (2002)	
Barbara Jane Anderson Fund (2000)	*Richard Allan Barry Fund (2002)	
*Selma and Bayness Andrews Fund (2007)	Basil Street Fund (1998)	
Michael & Ellen Angino Fund (1997)	Baudanza Family Fund (1997)	

*Peter A. Brooke Fund (1998)

*Peter W. and Ruth H. Brooke Fund (2004)

John F. Brooke Fund (2000)

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)

*John A. Butler Memorial Fund (1988)

Kairos Butler Fund (1994)

*Butler's Hole Fund (1994)

C & K Foundation Fund (2000)

*Cabot Family Charitable Trust Fund (2007)

Norman L. Cahners Fund (1984)

Campbell Foundation Fund (2003)

Allan R. and Martha M. Campbell Fund (1996)

A. Bruce Campbell Fund (2002)

Erin K. Campbell Fund (2002)

Michael C. Campbell Fund (2002)

Carpenter Family Foundation Fund (1997)

C. Alec and Sarah O' H. Casey Charitable Fund (1993)

*Alice F. Casey Fund (2007)

Margaret W. Casey Fund (1986)

Ellen W. Casey Fund (1993)

John J. Cattaneo III Fund (1984)

Champa Charitable Foundation Fund (2003)

*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)

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

*CJE Foundation Fund (2007)

John J. Clancy Fund (1998)

Clarke Fund (1987)

*Cohen/Lucas Fund (1999)

Coit Family Fund A (2001)

*Colby Charitable Fund (1980)

Colette Phillips Scholarship Fund (2004)

Colony Road Fund (1997)

Community Benefits Trust Fund (1998)

Condor Street Fund (1988)

John and Kimberly Cone Fund (1995)

*Constance and Lewis Counts Fund (1990)

Coolidge Family Fund (1982)

Cooper Leaser Family Fund (1997)

Copernicus Fund (2003)

*Corvelli Fund (1996)

Elizabeth Cotter Memorial Fund (2005)

George D. & Angelyn K. Coupounas Fund (1994)

Demetrios G. C. & Kimberly A. Coupounas Fund (1996)

Sophia D. Coupounas Fund (1996)

Cregan Charitable Fund (2005)

Crosby Family Fund (2000)

*Dainger Fund (1997)

Dammann Boston Fund (2003)

Paula Marie Danforth Memorial Scholarship Fund (1990) for a student attending either Lincoln/Sudbury Regional Vocational High School or Minuteman Regional Vocational Technical High School

Darling Family Fund (1983)

John Da Silva Memorial Fund (1988)

Todd F. Davenport Family Foundation Fund (2000)

Elizabeth Deming Coxe Fund (1995)

Edward L. and Paula B. DeMore Fund (2003)

*Deshpande Donor Advised Fund (2007)

deVille Fund (1994)

DeWolfe Family Fund (2000)

Joe DiGeronimo Charitable Fund (2004)

*Dibble Family Fund (2005)

*Larry DiCara Fund (2006)

Phyllis and Jimmy DiGeronimo Fund (2004)

Dillon Fund (2004)

*Dintersmith-Hazard Foundation Fund (2007)

*Dodson Family Charitable Fund (2007)

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)

Duggan Charity Fund (1998)

*Dunkin' Brands Community Foundation Fund (2006)

Deborah Dunsire and Michael Hall Fund (2005)

*Dupre-Nunnelly Charitable Gift Fund (2007)

Margaret Eagle Foundation Fund (2000)

Lesser Eber Fund (2005)

Echo Rock Fund (2000)

*A & E Educational Quest Fund (2004)

*EdVestors Grantmaking Fund (2003)

*Egozy Fund (2007)

*Eisenson Family Fund (2005)

*Ellis Family Fund (2003)

*Emerging Leaders Fund (2007)

Employment Retention Fund (2004)

English Family Fund (2005)

Ethics Trust Fund (1993)

Evans Family Fund (1999)

Norris & Constance Evans Charitable Fund (1999)

Eagle Bank-Frank E. Woodward Scholarship Fund (1985) scholarships for Everett residents

Excalibur Fund (1999)

*Peter and Ellen Fallon Fund (1997)

Thomas F. Farb & Stacy S. Valhouli Family Fund (2001)

FARM Fund (2006)

Fayerweather Fund (1988)

Martin & Kathleen Feldstein Fund (1986)

Ferdinand Fund (2000)

Fine Family Foundation Fund (2002)

Mark Hayden Fineman Chess Tournament Fund (1985) for awards to pre-high school students of the Nauset Regional School System who have demonstrated the greatest skill in chess

First Principle Fund (2006)

*Fisher Family Fund (2000)

Fishreys Family Philanthropic Fund (1999)

*Gloria A. Flaherty Fund (2003)

Edward S. Fleming Fund (1983)

Jack Florey Fund (2004)

Florin Family Charitable Fund (2004)

G. David Forney, Jr. Fund (1986)

Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families

*Americo J. Francisco Charity Fund (1998)

Americo J. Francisco Scholarship Fund (1993)

*Freeman/Kelly Family Fund (2005)

Niki & Alan Friedberg Fund (1986)

*Orrie M. Friedman Charitable Fund (1995)

Fryou Fund (2005)

Fulkerson Family Fund (1998)

Davis R. Fulkerson Fund (1999)

Lyle W. Fulkerson Fund (1999)

Sarah Fulkerson and Robert Le Roy Family Fund (1999)

Fulton Family Fund (2006)

Future Fund (2006)

*Gabriel Family Fund (2001)

Gabrieli Family Fund (1997)

Gaffney/Kames Foundation Fund (1997)

*Ganesh Fund (2001)

*Gannon Family Charitable Fund (2003)

*John Lowell Gardner Fund (1986)

R. Abel & Nancy L. Garraghan Fund (1986)

Dave Garroway Fund (1982)

Brad Gatlin Family Fund (1995)

Gaudette Family Fund (2000)

Carl J. Gilbert Fund (1984)

Albert Francis Gilmartin Memorial Scholarship Fund (2005) for students of Quincy, MA, residing in the Houghs Neck area

*Giving Three Fund (2007)

Gladstone Family Charitable Fund (2003)

Robert and Linda Glassman Fund (1985)

Globe Mallow Fund (2000)

Gold Bug Fund (1995)

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)

Rachael P. & Andrew P. Goldfarb Fund (2000)

Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)

Louis & Phebe Goodman Fund (1996)

Goodworks Fund (2002)

Gordon Educational Fund (2001)

Sandra & Philip Gordon Family Foundation Fund (2001)

Robert L. Gould Fund (1987)

Gravelley Springs Fund (2005)

Raymond C. & Joan C. Green Fund (1984)

Patricia H. Gross Fund (1999)

*Grunebaum Charitable Fund (2007)

*Gualala Fund (1991)

*Charles & Dorothy Gullickson Fund for Social Change (1998)

*H. Family Fund (2003)

Mary Haas and Ronald Leavitt Donor Advised Fund (2001)

Jay Habegger and Christine Nagle Fund (2004)

Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)

*W.J. Hannigan Family Fund (2004)

Ken and Becky Hansberry Fund (2001)

Charlotte C. Hart Family Fund (2001)

Tim and Elisabeth Hasselbeck Charitable Fund (2005)

J. Allan Hauter Memorial Fund (2004)

James E. Hayden Charitable Fund (2001)

Hebb Charitable Fund (2003)

*HEIRS Fund (1996)

Heitman Family Fund (1994)

Hel lyn Fund of Boston (1998)

Helies Family Fund (2000)

Elizabeth D. Heller Fund (1987)

Henderson Fund (1996)

Henry Fund (1986)

E. Byron Hensley Jr. Charitable Fund (1993)

Herzog Family Charitable Fund (2004)

*William H. and Jodi A. Hess Charitable Fund (2005)

*Hewitt Family Charitable Trust Fund (1993)

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)

*Margaret Hixon Fund (2007) Hobart / Toole Charitable Fund (2004)

Hoffman Fund (1986)

Holberger Family Fund (1993)

Thomas P. and Mary C. Holland Fund (2006)

Holland Family Fund (1993)

Ron and Cheryl Homer Fund (2005)

*Gilbert H. Hood Family Fund (1980)

Robert Hooper Family Fund (2004)

*Hourless Fund (1997)

Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham

M. Benjamin Howe Fund (1997)

Hoyt Family Fund (2000)

Hunt Fund for Children (2001)

Investing in the Future Fund (2000)

Ipswitch Fund (2000)

*Iron Mountain Education Fund (2004)

*J. Jill Compassion Fund (2002)

Mitchell & Diane Jacobs Fund (1998)

JAHELBE Fund (2002)

*Cynthia & Andrew Janower Charitable Fund (2007)

Rogina L. & Stephen B. Jeffries Charitable Fund (1991)

*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)

*Elizabeth Trichel Joyce Family Fund (2007)

Jumping Rock Fund (2000)

Kalman Family Fund (1996)

*Beton M. Kaneb Fund (1983)

Albert J. & Diane E. Kaneb Family Fund II (1997)

*Patricia A. Kaneb Fund (2003)

*Martin & Wendy Kaplan Fund (2007)

Steven E. Karol Charitable Foundation (1999)

Kassler Family Fund (2000)

Stephen and Caroline Kaufer Charitable Giving Fund (2004)

Kaye Charitable Fund (2003)

John & Anne-Marie Keane Foundation Fund (1997)

Kearney Family Fund (1995)

Mr. and Mrs. Raymond B. Keefe Memorial Fund (2005)

*Keewaydin Fund (2001)

Sabina F. Kelly Catholic Charitable Fund (1991)

Keogh Family Fund (2000)

Khudari Fund (2005)

*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)

Knopf Family Charitable Fund (2004)

Pamela Kohlberg Fund (1995)

Kopacz Charitable Gift Fund (2003)

Stephen P. Koster Fund (1985)

*Ronni Sachs Kotler Family Fund (2007)

Kravitz Family Fund (1993)

Anna Krezwick Fund (2002)

*Joseph and Lisa Krivickas Family Fund (2007)

*Joseph and Lisa Krivickas Family Fund II (2007)

*Raju and Melanie Kucherlapati Fund (2004)

*Clara K. Kupferschmid Childrens' Fund (1998)

*LAM Research Fast Track Fund/LAM Treatment Alliance (2005)

*G. Barrie Landry Fund (2005)

Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)

*Barbara Lee Family Foundation Fund (2004)

Thomas E. & Barbara B. Leggat Fund (1986)

C. Martin Leinwand Fund (1986)

Colman & Carol Levin Fund (2000)

*Levine Family Charitable Fund (2003)

*Joan & Theodore Levitt Family Fund (2000)

Charlotte Ruth Lewis Fund (1998)

Edward Bernard Roland Lewis Fund (1998)

Southard Lippincott Fund (1996)

John S. Llewellyn, Jr. Community Assistance Fund (1996)

LMG Fund (1997)

Joan Locatelli Foley Memorial Fund A (1997)

Joan Locatelli Foley Memorial Fund D (1997)

*GC & JW Lodge Fund (2000)

*Lord-Buck Fund (1996)

*Lovett-Woodsum Family Fund (1998)

Bruce Lunder Fund (1982)

*John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)

Donald J. & S. Kelley MacDonald Charitable Fund (1998)

Magic Penny Fund (1997)

Mahoney Family Fund (1983)

William G. Markos Fund (1982)

Evelyn A. Marran Fund (1983)

Martin Fund (1998)

*Sydell and Edward I. Masterman Fund (1997)

Mayel Fund (1982)

Richard & Judith McGinnis Fund (1999)

Eleanor P. McIntyre Fund (2001)

McNeill Family Fund (1997)

Medical Research Fund (1992) to support medical research in the fields of endocrinology and/or nuclear medicine

Medugno Family Fund (2006)

Emily & Bernard H. Mehlman Fund (2002)

*Mellowes Fund (1998)

*Leila Yassa & David Mendels Fund (2000)

*Gilbert G. Menna Family Fund (1999)

Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)

*Jack and Beth Meyer Foundation Fund (2007)

*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)

*Joseph Morton Miller Family Fund (1998)

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 (2007)

Tallulah Morgan Fund (1980) for educational purposes for the black community in Boston, in part for scholarships

*Mormann Family Fund (2007)

*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)

*Murray Hill Charitable Fund (1995)

*Musinsky/Krieger Fund (1996)

*Myrtle Field Fund (2004)

Mystic Harmony Fund (2000)

Leslie & Sandra Nanberg Charitable Foundation Fund (2001)

Narnia Fund (1986)

Tami E. Nason & Kent A. Lage Fund (2005)

Jean F. and David G. Nathan Fund (1986)

*Paul F. Nagle Memorial Fund (2007)

Neumann Family Charitable Account Fund (2003)

*New Beginnings/Kidder Fund (2004)

*Next Door Fund (2005)

North Conway Institute Fund (2001)

Chad & Lia Novotny Fund (2002)

*Kathryn Novotny Fund (2007)

*Nicholas Novotny Fund (2007)

Novotny/Ramirez Donor Advised Fund (2002)

*Novotny/Swahnberg Fund (1997)

Ohrn Family Fund (2000)

Ones Fund (2004)

*O'Brien Family Fund (2007)

*Thomas J. O'Neil Memorial Fund (2007)

Richard T. O'Rourke Fund (1988)

*Orpheus Fund (2002)

Palisades Fund (1986)

*Morgan Palmer Charitable Fund (1982)

John J. Pappenheimer Fund (1995)

Parker Family Fund (2000)

*Field Parker Fund (1996)

*Richard J. Parker and Donna K. Sherman Charitable Fund (2003)

Partnership Fund in honor of Anna Faith Jones (2001)

*Alfred Nash Patterson Foundation for the Choral Arts Fund (1979) for the encouragement of composition and performance of new works of choral music and for the support of choral group activities

Payne's Creek Fund (2001)

*Payson Family Fund (2000)

Peeler/Kellogg Fund (1999)

Samuel Perkins and Nancy Reed Fund (1996)

Sheila and Sara Perkins Fund (1996)

Perkins Improvements Fund - William (1996)

John A. Perkins, Jr. Fund (2000)

John & Lydia Perkins Fund (1999)

Robert C. Perkins Fund (2000)

Thomas Perls Fund (2004)

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)

Renata Poggioli Fund (1991)

Pokross/Gill Family Fund (1996)

Pool Family Fund (1997)

William Townsend Porter Fund (1998)

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)

*Sue and Bernie Pucker Fund (2002)

*Donald and Frances Putnoi Charitable Fund (2007)

Peg Pyne Fund for Handicapped Access (1985) to make congregations accessible to handicapped worshipers

*Quid Nunc Fund (2001)

Quinn-Jacobs Family Fund (1992)

Sidney R. & Esther V. Rabb Family Fund (1983)

*Barbara & Yale Rabin Fund (2002)

Radtke Family Fund (1996)

*Richard E. & Mary F. Rafferty Fund (2007)

*Emma W. Ramstad Fund (1998)

*Otto W. Ramstad Fund (1998)

Bessye Bedrick Ravelson Fund (2003)

*Raytheon Company Matching Gifts for Education Fund (2001)

*Gene Record Fund (2002)

Sara Delano Redmond Fund (1996)

*Regan Family Charitable Fund (2005)

Robert B. Reich Fund (2000)

Remmer-Fox Family Fund (1995)

Renaissance Fund (1998)

Reno Family Charitable Foundation (1998)

Edward S. Reynolds Memorial Fund (1984)

Russell & Carla Ricci Fund (1985)

*Rich Florin Family Fund (2005)

*Riptide Fund (2002)

Jonathan Rizzo Memorial Foundation Fund (2001)

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

*Andrew L. & Leslie (George) Ross Fund (2003)

*Rotman-Attardo Family Fund (2005)

Rotten Dock Fund (1988)

*Roy/Thompson Family Fund (2000)

*Dr. Jordan S. Ruboy Charitable Fund (1998)

Russell Family Charitable Gift Fund (2005)

Russell-Oliver Family Fund (1997)

*Rust Bowl Fund (1987) for the benefit of cultural arts, including theatre

*Robert Sachs & Caroline Taggart Gift Fund (1998)

*Saffron Circle Fund (2006)

*Salmon Family Charitable Fund (2007)

Risha C. and Paul A. Samuelson Fund (1982)

Kazanjan Sargeant Fund (1996)

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)

Sea Street Fund (2004)

Francis P. Sears Scholarship Fund (1973)

Gerald Segel Fund (1981)

*Seim Fund (2003)

September Fund (2000)

Norman J. & Maryellen S. Shachoy Fund (1997)

*Shadow Lake Children's Fund (2002)

Shames/Egasti Fund (1991)

Shapiro/Fleishman Fund (1999)

*Douglas Boyd Sharpe Donor Advised Fund (2007)

Shawkemo Fund (2000)

Sherborn Fund (1997) for the benefit of charitable organizations, activities, and residents of Sherborn, Mass

*Sherman Family Foundation Fund (2005)

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)

*Steven and Karen Sisselman Family Fund (2005)

63 Marlborough Street Fund (1984)

Skylight Fund (2000)

Ellin Smalley Fund (1987)

Smith Family Charitable Fund (2004)

Austin & Susan Smith Fund (1999)

Walter A. & Hope Noyes Smith Fund (1985)

J. Alper Smith Fund (1996)

Clark R. Smith Fund (1990)

*Social Venture Partners - Boston Fund (2001)

Society of Women Engineers-Boston Fund (1996)

*Lawrence and Lillian Solomon Fund (2007)

*Somerville Fund (1996)

Nancy and George Soule Family Fund (1997)

*Spector Fund (2001)

*Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund (2007)

*David F. Squire Family Fund (1997)

Aaron Stein Fund for Group Psychotherapy (1983)

*Harvey & Shirley Stein Fund (1999)

*Dola Hamilton Stemberg Fund (2007)

Stewart Fund (2006)

*Stewart-Holtzman Fund (2001)

Stone Charitable Fund (1999)

Stone Family Fund (1999)

Elihu and Lillian Stone Family Charitable Fund (2003)

Stonehill Enrichment Fund of the Ames Free Library (1994)

Robert Strange Family Fund (2003)

*Congressman Gerry E. Studds Fund (2007)

Sugarman Fund (1982)

*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)

Sustainable Future Fund (2003)

Sylvan Fund (1985)

*TechFoundation Fund (2002)

Tempero Family Fund (2002)

Thomsen Family Fund (2000)

Susan and Michael Thonis Fund (2005)

*Tiare Fund (1996)

*Scott and Jennifer Tobin Charitable Fund (2004)

*Topol Family Fund (1991)

*Gerard B. Townsend Charitable Fund (1995)

*Trefler Fund (1997)

*Tye Charitable Fund (2007)

Thomas & Lois Valeo Fund (1982)

Valette Family Charitable Fund (2001)

*Joseph Bishop Van Sciver Fund (1861-1943) (1997)

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 (2007)

*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)

*Walker Fund (1998)

Ruth & Henry Walter Fund (1982)

J. H. & C. K. Walton Fund (1986)

Warner Charitable Gift Fund (2000)

Waterfield Fund (2002)

Sally Sutfenfield Webb Fund (1998)

Weiss Charitable Fund (2004)

Jack and Kathleen Welch Fund (2001)
 *Wellesley Hills Congregational Church Outreach Fund (2007)
 Lois & David Weltman Fund (1991)
 Annie Evans White Memorial Fund (1970) for the benefit of needy persons of Winchendon, Massachusetts
 Frank & Jean White Fund (2001)
 Janet White Memorial Scholarship Fund (2004)
 *Whitehead – Sayare Fund (2007)
 Whittier Family Charitable Fund (2005)
 Guy and Maggie Wickwire Fund (1989)
 *Benjamin J. Williams, Jr. Fund (1986)
 David B. Williams 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)
 Witkowicz Charitable Fund (2005)
 *Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 Karin E. Wood Fund (1993)
 Michael N. Wood Fund (1996)
 Wurcer-Kleiner Fund (2005)
 Paul & Eleanor Young Fund (1988)
 *Zabin Charitable Fund (2001)
 Zarkin Family 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)
 *Zwanziger Fund (2007)



Finance Department members (clockwise from front and center): Allison Bates, Hope Groves, Kathy Chery, Jessie Zuberek and Stacey Riddick

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

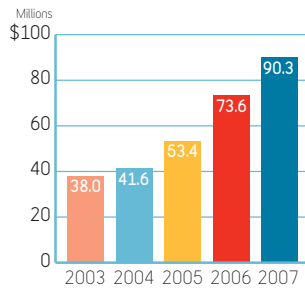
James R. Bancroft Trust (1953) income to be paid to the Boston Foundation for general purposes
 Boston's Fourth of July Foundation, Inc.
 *Deshpande Foundation (2007)

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

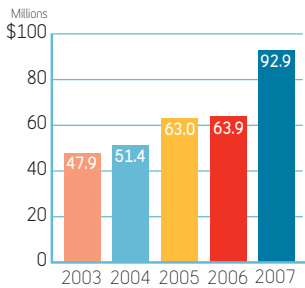
Increased Growth from 2003 through 2007

Gifts to the Boston Foundation have steadily and significantly grown over the last five years, increasing the Foundation's total assets to \$897 million. In 2007, the Foundation, once again, set an all-time record for grants paid, gifts received and total assets.

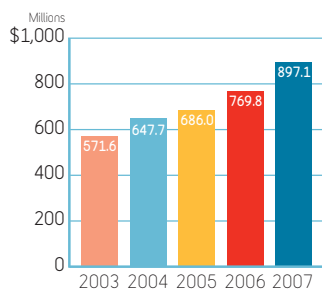
Gifts Received



Grants Paid



Total Assets



2007 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 Foundation's assets are professionally managed in a pool known as the Fund for the 21st Century. The Fund has a long-term time horizon, and is structured with the objective of achieving returns in excess of the targeted spending policy, costs and inflation. Total assets as of June 30, 2007 were \$897 million, up from \$770 million in the prior year.

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 Boston Foundation takes a total return approach to investment management under the Uniform Management of Institutional Funds Act (UMIFA). Total return is a term used to describe the total change in fund value over a given time period resulting from both interest and dividends, and capital appreciation (realized and unrealized gains). Investing for total return, as opposed to just investing for interest and dividends, allows the Foundation to capture a portion of the historically higher appreciation in the equity and equity-like markets for grantmaking purposes.

The assets of the Fund for the 21st Century include not only

Performance as of June 30, 2007

	1 Year	3 Year	5 Year
Total Fund	19.9%	14.1%	12.8%
Policy Benchmark*	19.3%	13.1%	11.6%
S&P 500 Index	20.6%	11.7%	10.7%
Lehman Brothers Aggregate Index	6.1%	4.0%	4.5%

*Policy benchmark is a composite of the individual benchmarks used to measure each manager's performance. Past performance is not a guarantee of future results.

traditional stock and bond investments, but participation in private equity, venture capital, real estate, timber and absolute return strategies. Diversification among multiple asset classes helps to reduce the volatility of the Foundation's endowment and should moderate market risk.

The Spending Policy

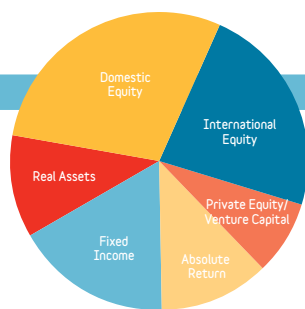
By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2007 spending rate was 6% for all endowed Boston Foundation Funds. The Foundation uses a smoothing mechanism that helps balance the 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 and Proxy Voting

The Boston Foundation was the first major community foundation in the country to actively promote its values and expectations around the areas of corporate governance by exercising its right to proxy voting for its investments. Proxy voting is the basic mechanism through which shareholders can influence the governance

Asset Allocation *as of June 30, 2007*

● Domestic Equity	29%
● International Equity	23%
● Private Equity/Venture Capital	8%
● Absolute Return	12%
● Fixed Income	17%
● Real Assets	11%



and behavior of corporations in which they hold stock. The Foundation focuses its proxy voting on key issues including the environment, community well-being, diversity and equity and good corporate governance.

Additionally, this year the Foundation began a two-part strategy that calls for the Foundation to distance itself from companies that are engaged in business in the Sudan. This includes, first, divestment of any direct holdings in such companies, and, second, a new approach of shorting stocks that are held indirectly by the Foundation as the result of investments held in pooled funds.

Audited Financial Statements

The Foundation's financial statements were prepared under strict policies and procedures overseen by the Foundation's independent Audit Committee and, ultimately, the Board of Directors. The statements were audited by KPMG, LLP. KPMG has issued an unqualified opinion on the financial statements for the year ended June 30, 2007. A summary of the financial statements is shown here, but copies of the full financial statements are available on our web site at www.tbf.org or by calling the Foundation's offices at 617-338-1700.

Expense Control

The Foundation's management and Board of Directors take careful steps to ensure that the operating expenses are kept as low as possible. The Foundation maintains an expense to total asset ratio of 1.0%.

2007 Summary Financial Statements

Assets:

Receivables	\$ 14,482,933
Investments	879,053,941
Other	3,593,274
Total Assets	\$ 897,130,148

Liabilities & Net Assets:

Accounts Payable and Accrued Liabilities	\$ 5,105,924
Grants Payable	7,629,467
Other	4,073,604
Net Assets	880,321,153
Total Liabilities & Net Assets	\$ 897,130,148

Revenues:

Contributions	\$ 90,321,166
Net Investment Return	138,969,557
Total Revenues	\$ 229,290,723

Grants & Expenses:

Grants	\$ 92,856,047
Change in Split Interest Trusts	2,189,633
Program Support	3,066,853
Operating Expenses	8,064,192
Total Grants & Expenses	\$ 106,176,725

Change in Net Assets	\$ 123,113,998
Net Assets Beginning of Year	\$ 757,207,155
Net Assets End of Year	\$ 880,321,153



Communications Department members (seated from left): Timothy Gassert, Barbara Hindley, Stephen Sullivan and Charlotte Kahn; (standing from left) Jessica Martin, David Trueblood, Mary Jo Meisner, James Rooney and Maura Fogarty

Acknowledgments

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