

A CITY REAWAKENS



FESTIVAL BETANCES,
IBA'S VILLA VICTORIA

Photo by **Yuder Mezarene Aldi**

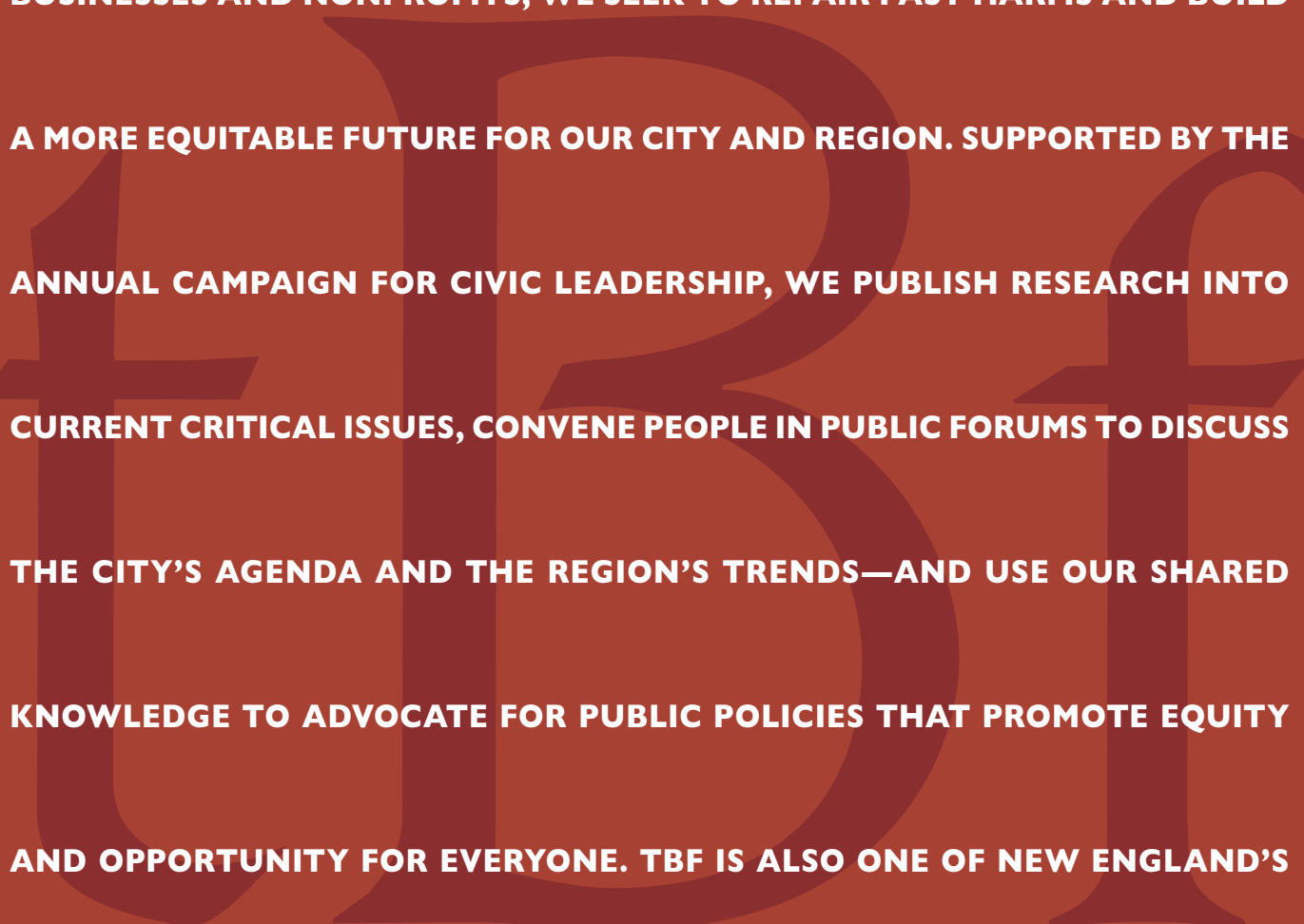


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On the Cover:

BAMS FEST by **Craig Bailey**



FOUNDED IN 1915, THE BOSTON FOUNDATION, IS ONE OF THE LARGEST AND MOST INFLUENTIAL COMMUNITY FOUNDATIONS IN THE COUNTRY. PARTNERING WITH COMMUNITY MEMBERS, DONORS, THE PUBLIC SECTOR, BUSINESSES AND NONPROFITS, WE SEEK TO REPAIR PAST HARMS AND BUILD A MORE EQUITABLE FUTURE FOR OUR CITY AND REGION. SUPPORTED BY THE ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP, WE PUBLISH RESEARCH INTO CURRENT CRITICAL ISSUES, CONVENE PEOPLE IN PUBLIC FORUMS TO DISCUSS THE CITY'S AGENDA AND THE REGION'S TRENDS—AND USE OUR SHARED KNOWLEDGE TO ADVOCATE FOR PUBLIC POLICIES THAT PROMOTE EQUITY AND OPPORTUNITY FOR EVERYONE. TBF IS ALSO ONE OF NEW ENGLAND'S LARGEST GRANTMAKERS, SUPPORTING NONPROFITS IN GREATER BOSTON THROUGH OUR ENDOWMENT AND WORKING CLOSELY WITH OUR DONORS TO SUPPORT NONPROFITS LOCALLY, NATIONALLY AND AROUND THE WORLD.

WELCOME

*t*his year, the first full year under the leadership of our President and CEO M. Lee Pelton, we announced a new strategic vision that places equity at the center of everything we do.

We also embraced our role as a civic leader, publishing fresh research, holding crucial conversations with our community's stakeholders and successfully advocating for change on the policy level.

Through this work, as well as our grantmaking and the close partnerships we have with our donors and others, we addressed a number of the issues that are testing our resolve as a community.

You will learn about some of those issues and our responses in this annual report. We pledge to work with you to continue and expand upon this work in 2023 as we face our common future together.



Linda Mason
Chair





IN THE SUMMER OF '22, WE MADE UP FOR SOME OF WHAT WAS LOST DURING THE PANDEMIC BY COMING TOGETHER IN PARADES, FESTIVALS AND OTHER CELEBRATIONS. THE PHOTOS IN THIS REPORT WERE TAKEN BY SIX COMMUNITY-BASED PHOTOGRAPHERS WHO CAPTURED THE RELIEF, THE JOY AND THE POWER OF HUMAN CONNECTION.

A CITY REAWAKENS

ABOUT OUR PHOTOGRAPHERS

YUDER MEZARINE ALDI was born in Cuba and moved to the Boston area in 2014. He lives in Hyde Park and focuses his talent both on photography and film. He has a passion for photographing the people and events that reflect the diversity of Greater Boston.

CRAIG BAILEY is a longtime resident of Boston's South End. He specializes in capturing the moment through portraits, special events, art and performing artists. He has worked as a documentarian and for several media outlets, periodicals, nonprofits and universities.

DARLENE DEVITA is a professional photographer and 18-year resident of Chelsea. During the pandemic, she documented the remarkable spirit of the city's residents. Her documentary project, *The People of Chelsea Project*, recently featured as an exhibit, will also be a book.

ANGELA ROWLINGS is an independent photojournalist, photography instructor, English/Spanish interpreter, and lifelong Bostonian. She reports on climate, culture, politics and human rights issues, and produces long-form visual essays in Boston, Canada, and Latin America.

OJ SLAUGHTER is documenting the history of "right now," with a focus on Roxbury. A self-taught photographer, their work has been featured in several prominent magazines and other publications. Their focus on racial justice has been recognized with several awards.

LEE-DANIEL TRAN lives in Dorchester and is a student at UMass Boston majoring in Community Development with an additional focus on Asian American Studies. When he isn't in class or studying, he is a freelance photographer specializing in portraits and events.

IBA'S
TITO PUENTE
LATIN MUSIC
FESTIVAL

Photo by
Craig Bailey

INTRODUCTION

by Our President and CEO

*t*his is an energizing time for Greater Boston and for the Boston Foundation. Following one of the most painful chapters in our city's history, the people of Boston are experiencing a reawakening. Informed by the hard lessons we learned during the pandemic, we are embracing, even demanding, change.

It was in this climate that the Boston Foundation introduced *Our New Pathway*, a strategic vision that focuses on recognizing and repairing the harm that has been done in the past while building a more equitable future. I am deeply grateful that this vision has been so warmly received by our staff, our board and by the communities we serve.

This annual report briefly tells the stories of some of the inequities we tackled this year and our responses to them. I hope you will find the text and the photography—by a diverse group of Boston photographers—both informative and uplifting.



M. Lee Pelton
President and CEO







DORCHESTER DAY PARADE

EQUITY THROUGH A COMMON START

BUILDING A RESILIENT EARLY EDUCATION SYSTEM

*t*he pandemic exposed a crisis in early education and care which predated COVID-19, pulling back the curtain on a fragile and fragmented system. Massachusetts has one of the most expensive child-care markets in the country and relies on providers who primarily are women of color with small businesses that are struggling to survive.

Our report, *When the Bough Breaks*, documented the crisis and built the case that investing in early education and care is not only crucial to child development, but an urgent priority. The report and our participation in the Common Start Coalition helped to inform state government about the crisis. On July 7th, *An Act to Expand Access to High Quality, Affordable Early Education* passed the Massachusetts Senate and a bill proposed by the House would offer \$200 million a year for the sector. On July 28th, Governor Baker signed the state's 2023 budget, which provides \$250 million in funding for early education and care.





THE **DORCHESTER DAY PARADE**

IS A FAMILY AFFAIR, BUT THE BUDGETS OF DORCHESTER'S FAMILIES—AND THOSE OF ALL FAMILIES IN GREATER BOSTON—HAVE BEEN STRETCHED THIN BY THE LACK OF AFFORDABLE EARLY EDUCATION AND CARE. THIS YEAR, THE BOSTON FOUNDATION INFORMED AND SUPPORTED STATE-LEVEL REFORMS THAT WILL IMPROVE THE ENTIRE SECTOR AND HELP TO GIVE ALL OUR CHILDREN A COMMON START (PAGE 6).



EQUITY THROUGH COMMUNITY WELL-BEING

BUILDING THE CARPE DIEM FUND

*f*or decades, it's been a struggle to find affordable rental housing in Boston. Today it's almost impossible. To rent a median-priced one-bedroom apartment in Boston, you need an annual income of more than \$85,000—and demand for the limited number of subsidized units is fierce, with the burden falling disproportionately on residents of color.

The Carpe Diem Fund is creating a source of agile, responsive capital to help local organizations purchase occupied housing and preserve affordable units. The initial investment in the Fund was made possible through a partnership with Boston Medical Center, which was chosen by the national Center for Community Investment to form a Boston team of housing stakeholders, including TBF, with funding from the Robert Wood Johnson Foundation. The goal is to build community well-being by purchasing affordable housing units and supporting Black- and Brown-owned businesses and creative spaces.

It's a bow to the way communities really work—and an idea whose time has come.

PAO ARTS CENTER'S FIFTH ANNIVERSARY CELEBRATION







CHINATOWN'S PAO ARTS CENTER CELEBRATED ITS FIFTH ANNIVERSARY WITH THE UNVEILING OF AN ART INSTALLATION BY ARTIST CHERYL WING-ZI WONG THAT OFFERS A GATHERING AND PERFORMANCE SPACE ON THE GREENWAY. IT'S AN EXAMPLE OF A DEFINITION OF COMMUNITY WELL-BEING THAT HAS BEEN EMBRACED BY THE BOSTON FOUNDATION THROUGH THE NEW CARPE DIEM FUND (PAGE 10).



Photos by **Lee-Daniel Tran**



EQUITY THROUGH JUSTICE & OPPORTUNITY

BUILDING A NEW TOWN SQUARE

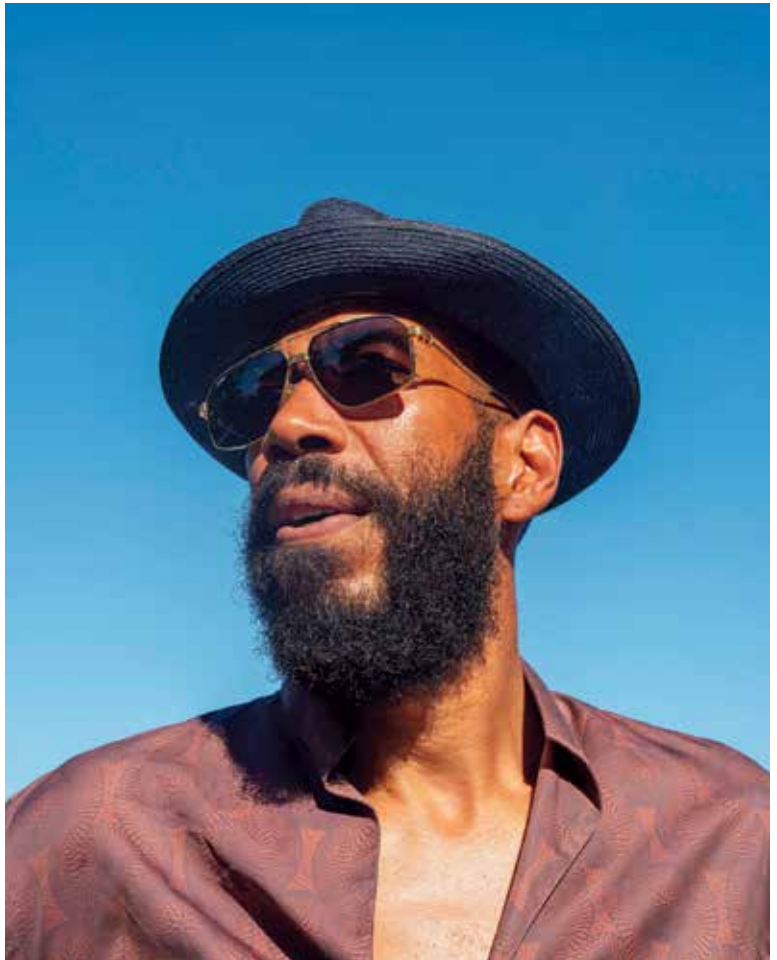
*m*any decades of racism and disinvestment have denied Boston's people of color the opportunity to buy homes and start businesses. The stark results were published in the 2015 Federal Reserve Bank of Boston's report *The Color of Wealth*—now being updated by a partnership that includes the Boston Foundation—which found that the average net worth of the assets of a Black household in Boston was \$8.

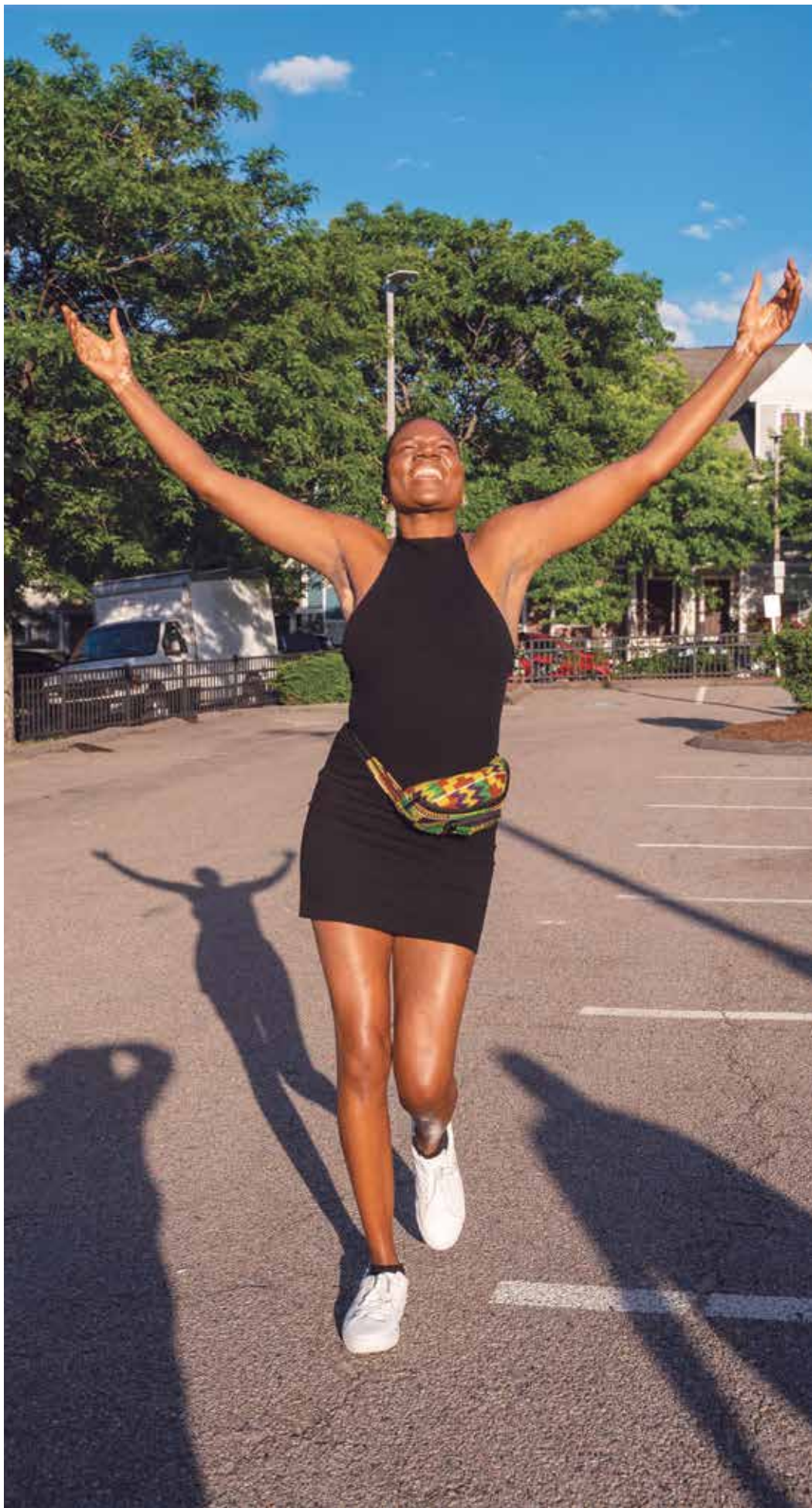
Embrace Boston is animating its goal of dismantling structural racism by building a memorial on Boston Common to Martin Luther King, Jr. and Coretta Scott King, holding an annual Embrace Ideas Festival, and developing a permanent cultural gathering space in Roxbury. It will be a place to experience performances and exhibits by BIPOC artists—amplifying the next generation of culture creators—as well as a curated exhibit on Boston's complicated and inspiring civil rights history—all while helping to build a city that fosters equity, justice and opportunity.

NUBIAN SQUARE CELEBRATES JUNETEENTH









NUBIAN SQUARE WAS THE SITE OF OUR CITY'S FIRST JUNETEENTH CELEBRATION SINCE IT BECAME A FEDERAL HOLIDAY IN 2022. IT WAS THE CULMINATION OF EMBRACE BOSTON'S WEEK-LONG EMBRACE IDEAS FESTIVAL, WHICH FOCUSED ON MUSIC, ART, CULTURE, IDEAS, JOY AND COMMUNITY. NOW EMBRACE BOSTON IS PLANNING A NEW TOWN HALL IN ROXBURY (PAGE 14).

Photos by **OJ Slaughter**



FESTIVAL BETANCES



EQUITY THROUGH GRASSROOTS LEADERSHIP

BUILDING THE STRENGTH OF BOSTON'S CHANGEMAKERS

Lack of opportunity. Poverty. Racism. Unfair systems that underserve, overlook and ignore entire groups. These are just some of the barriers faced by Black, Latino, Indigenous and all people of color in our city as well as those who identify as nonbinary, people with disabilities, and members of other marginalized communities. Some beat the odds and rise to become activists, advocates and changemakers.

The voices and the ideas of grassroots leaders strengthen everything we do. During the pandemic, these leaders have faced unparalleled challenges. Fifteen of them participated in the Boston Neighborhood Fellows program through which they received professional development and coaching to strengthen their leadership skills. They also held wellness retreats and storytelling workshops that culminated in the Community Spotlight Series—brief, moving videos through which they shared the experiences that have shaped them—and their determination to help others facing similar challenges.

We invite you to visit tbf.org/spotlight for videos about these changemakers.

A POWERFUL EXAMPLE OF GRASS-ROOTS LEADERSHIP WAS THE 1968 MOVEMENT BY THE SOUTH END'S PUERTO RICAN RESIDENTS THAT STOPPED THE CITY OF BOSTON FROM LEVELING THEIR HOMES DURING URBAN RENEWAL. THE BOSTON FOUNDATION SUPPORTED THE RESULT OF THAT ACTIVISM WITH EARLY FUNDING FOR **INQUILINOS BORICUAS EN ACCIÓN**, WHICH HONORS ITS ROOTS EVERY YEAR THROUGH **FESTIVAL BETANCES**. WE CONTINUE TO SUPPORT NEIGHBORHOOD-BASED GRASSROOTS LEADERSHIP (PAGE 18).

Photos by **Yuder Mezarene Aldi**





EQUITY THROUGH COLLABORATIVE PHILANTHROPY

BUILDING BRIDGES OF TRUST IN CHELSEA

Chelsea was hit hard by COVID-19.

With a large immigrant population, many working in the service industry, jobs were lost as restaurants and hotels cut back or closed—and basic human needs were threatened. But Chelsea is resilient and has a strong nonprofit infrastructure that quickly went into overdrive. Moving stories emerged of pop-up food pantries, clothing drives and extraordinary acts of kindness.

This year saw the culmination of an experiment that helped Chelsea respond to the pandemic and built bridges of trust between the Boston Foundation and the people of Chelsea. Called Chelsea 2021, it was a collaboration between our donors, nonprofit leaders, community members, city officials and our own staff, some with personal ties to Chelsea. It represented a model approach to philanthropy—and to social justice—that pumped \$825,000 into the community and shifted much of the decision-making about the grants to our nonprofit partners.







CHELSEA'S BLACK HERITAGE FESTIVAL WAS HELD IN THE WAKE OF THE CITY'S REMARKABLE RESPONSE TO THE PANDEMIC. CHELSEA'S POPULATION IS DIVERSE: 66% LATINO, 36% MULTIRACIAL, AND 6% BLACK. A UNIQUE COLLABORATION OF TBF DONORS AND NONPROFITS CALLED CHELSEA 2021 HELPED THE CITY RESPOND TO COVID-19 (PAGE 22).

Photos by **Darlene DeVita**

OUR CLOSEST PARTNERS

**OUR
DONORS**

*Our
donors
make
everything
we do
possible.*

The Annual Campaign for Civic Leadership

EQUITY IS OUR GUIDING PRINCIPLE

These crucial resources help us conduct fresh, timely research, bring diverse people together to discuss the findings of our reports and plan our city's future agenda. They also support our work with policymakers on the state and national levels to inform and advocate for legislation that furthers our goals of promoting equity, justice and opportunity throughout Greater Boston. We thank all of our donors for their support.

The following individuals, families and institutions contributed to this year's campaign to support the Boston Foundation's civic leadership.

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“The Boston Foundation is an important civic leader for Greater Boston. We were honored to co-chair a previous campaign during the pandemic—a time of tremendous need in our city.”

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“We invest in the Annual Campaign for Civic Leadership because we care deeply about the health and prosperity of our city and region.”

JILL AND NIRAJ SHAH

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“Supporting the Boston Foundation through the Annual Campaign for Civic Leadership is table stakes for those who care about Boston.”

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Our Permanent Fund for Boston

IN SUPPORT OF GREATER BOSTON

The Permanent Fund for Boston is the most flexible fund held by the Boston Foundation. This fund gives our staff and board the resources they need to respond to the most pressing issues facing our community. It's made up of hundreds of separate funds that are either for a specific purpose or institution or completely unrestricted.

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The following list includes donors who have made gifts totaling \$1 million or more to the Permanent Fund for Boston, with the year of their first contribution noted in parentheses.

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 Paul and Patricia Gannon (2015)
 Charles Hapgood Trust (2009)

Alfred C. Harcourt Trust (2002)
 Theodore C. Hollander Trust (1994)
 Barbara and Amos Hostetter (2008)
 Estate of Francis C. Huvos (2003)
 Robert K. Kraft and Family (2016)
 Estate of James Longley (1918)
 Mason Charitable Remainder Annuity Trust (2001)
 Willis Munro Trust (1990)
 One8 Foundation (2016)
 Robert A. and Veronica S. Petersen (2016)
 Stephanie and Brian Spector (2016)
 Esther G. Stoddard Trust (2007)
 Estate of Albert J. Stone (1960)
 Vingo Trust II (1994)
 Arthur M. Winn and Family (2020)

“The people who have invested in the Permanent Fund for Boston before us have helped to make Boston the truly great city that it is. Ultimately, having access to flexible, charitable capital has helped our community’s residents thrive.”

SANDRA AND PAUL EDGERLEY
 DONORS TO THE PERMANENT FUND FOR BOSTON

\$10,000-\$999,999

The following list includes donors who have made gifts totaling \$10,000 – \$999,999 to the Permanent Fund for Boston, with the year of their first contribution noted in parentheses.

- | | | |
|------------------------------------------------------|------------------------------------------------------------|-------------------------------------------------|
| Anonymous (21) (1992-2021) | Ellen E. Carroll Trust (1979) | First National Bank of Chicago (1990) |
| Estate of Alice A. Abbott (1967) | Estate of Charles T. Carruth (1983) | Estate of Benjamin Fisher (1996) |
| Rosalin Acosta (2013) | Dorothy Jordan Chadwick Fund (2001) | Fabian and Suzanne Fondriest (2022) |
| Pamela D. Adams (2016) | Fay M. Chandler (2001) | Estate of Barbara B. Fontaine (1997) |
| Estate of Edith Allanbrook (2003) | Estate of Gladys Chiquoine (1983) | Martha M. Fosdick Fund (1978) |
| Estate of Emily T. Allen (2007) | Robert M. Christison Trust (1984) | Estate of Edith R. Fottler (1948) |
| Margaret Shaw Allen Trust (1982) | Estate of Helen A. Claflin (1992) | Ruth S. Frake Trust Bequest (1981) |
| Estate of Matilda S. Alley (1964) | Estate of William H. Claflin (1983) | Lucille Francis (2015) |
| Estate of Miriam S. Alley (1965) | Combined Jewish Philanthropies
of Greater Boston (1991) | Estate of Alma L. Frost (1948) |
| Joel Alvord and Lisa Schmid-Alvord (2015) | Commonwealth of Massachusetts (2009) | Estate of Anna C. Frothingham (1941) |
| Margaret S. Atwood Trust (1970) | Estate of Anastasia Conte (1988) | John Lowell Gardner Fund (1987) |
| Estate of Margaret E. Babcock (1973) | Brian and Karen Conway (2021) | Estate of Forrest C. Gates (1970) |
| Estate of Annie O. Baldwin (1953) | Ford H. Cooper Trust (1982) | Estate of Mary M. Geist (1982) |
| James R. Bancroft Trust (1983) | Barry B. Corden (2012) | Estate of Pauline S. Germeshausen (2006) |
| Bank of New York Mellon (1991) | Estate of Maria Corinne Dana (1963) | Georgiana Goddard Eaton Memorial Fund
(2018) |
| Helen C. Barker Trust (1990) | Edward Hyde Cox Trust (2001) | Elizabeth D. Goldsmith Trust (2011) |
| Estate of Harriett M. Bartlett (1990) | Estate of John Frederick Crane (2022) | Grand Bostonians Dinner (1984) |
| Estate of Wilbert S. Bartlett (1969) | Michael F. Cronin (2004) | Estate of Anne C. Gray (2010) |
| The Beacon Companies (1997) | Estate of Arthur S. Cummings (1943) | Donald Gregg (1963) |
| Nancy Beals Trust (1984) | Joan Pokross Curhan and Ronald C. Curhan
(1990) | Estate of Patricia Grisham (1964) |
| Estate of George P. Beech (2003) | Estate of Charlotte E. H. Curtis (1940) | Estate of Joseph Guild (1964) |
| Diane Beever Charitable Remainder Unitrust
(2008) | Theodore H. Cutler (2015) | Estate of John H. Hagopian (2002) |
| Richard A. Berenson Family Trust (2000) | Anne H. Davis Trust (1964) | Estate of Ellen Page Hall (1931) |
| Nelson Bigelow Trust (1990) | Davis Family Charitable Foundation (2016) | Estate of Jean Hanlon (1991) |
| Estate of William L. Birely (1959) | Gladys Dean Trust (1977) | Estate of Dorothy C. Harris (1967) |
| Linda Cabot Black Foundation (2006) | John H. Deknata and Carol M. Taylor (2016) | Carrie A. Hartley Trust (1963) |
| Estate of Dorothea M. Blizzard (2022) | Luisita L. Denghausen Trust (1990) | Estate of Elizabeth M. Hay (1972) |
| Dr. Barry Bluestone (2017) | Martin Deutsch (1997) | Haymarket People's Fund (1994) |
| Estate of Edmund Bridge (1933) | Grace L. Diggles Trust (1993) | Estate of Fred R. Hayward (1969) |
| Estate of Frederick W. Bridge (1942) | Estate of Kenneth S. Domett (1960) | Helen P. Hennessey Trust (1984) |
| Mr. and Mrs. Peter A. Brooke (1994) | Phyllis G. Downing Trust (2001) | Ada H. and Clara Hersey Trust (1955) |
| Mabel M. Brown Trust (1991) | Lisa J. Drapkin (2014) | Elizabeth D. Herteli Trust (2003) |
| Peggy A. Brown (2008) | Estate of Mary Frances Drown (1929) | Vladimir N. Herteli Trust (2003) |
| Katherine H. Browning Trust (1991) | Wm. Arthur Dupee Memorial Fund (1984) | George L. Hill Trust (2002) |
| Build the Out-of-School Time Network
(2020) | Dusky Foundation (2013) | Estate of Anna P. Hills (1969) |
| Henry Burkhardt III (1986) | Eastern Bank Charitable Foundation (2014) | Estate of Harry Holland (2008) |
| Rick and Nonnie Burnes (2021) | Estate of George H. Eastman (1971) | Estate of Grace Scott Hollett (2005) |
| Estate of Jesse F. Burton (1971) | Michael and Barbara Eisenson (2021) | Estate of Agnes G. Homes (1961) |
| Margaret A. Bush (2021) | David J. Elliott and Hungwah Yu (2003) | Katherine B. Hood (2001) |
| Catherine and Paul Bутtenwieser Foundation
(1991) | Paul Elliott Trust (1991) | Estate of Adeline D. Hooper (1973) |
| Cabot Family Charitable Trust (2001) | Virginia Ellis Memorial Fund (1976) | Estate of Mary Frothingham Hooper (1961) |
| Estate of Susan Cabot (1947) | Leon R. Eyges Memorial Fund (1963) | Estate of Elizabeth B. Hough (2000) |
| William Putnam Cabot (1970) | George R. Farnum (1982) | Donald J. Hurley Memorial Fund (1978) |
| Kevin T. and Julie Callaghan (2016) | Mary C. Farr Trust (2006) | Estate of Muriel Hurovitz (2019) |
| | Grace and Edward Fey (2021) | Jane W. Hyman (2002) |

Mark Hyman, Jr. Trust (1999)
 Institute for Affirmative Action (2007)
 International Council Trust (2000)
 Greg and Maria Jobin-Leeds (2015)
 Stephen P. Jonas (2007)
 Cyril H. Jones Trust (1974)
 Ross Jones and Emily Nielsen Jones (2015)
 Estate of Frances A. Jordan (1978)
 Estate of Ethel M. Joy (1993)
 Louis and Marcia Kamensky (2013)
 The Keane Family Foundation (1997)
 Mr. and Mrs. John F. Keane (2001)
 Vera Kilstein (2019)
 Estate of Paul Kimball (1964)
 Pauline Kleven Trust (1990)
 Estate of James G. Knowles (1982)
 Dr. and Mrs. Arthur R. Kravitz (1987)
 Bernard E. Kreger (2021)
 Estate of Louise P. Kush (1997)
 Aimee Lamb Trust in memory of Winthrop
 and Aimee Sargent (1980)
 Estate of Ida Fales Lamb (1967)
 Lambert Marital Trust (2007)
 Mr. and Mrs. Herbert Lee (1999)
 Thomas Lee (1997)
 Barbara Estabrook Livermore Trust (1982)
 Local Initiatives Support Corporation (2021)
 Caleb Loring Jr. and Rosemary M. Loring
 (1997)
 George and Ellen Lovejoy (2015)
 Robert Lucas (2019)
 The Lynch Foundation (2021)
 Cora E. MacKenzie Trust (1973)
 Mr. and Mrs. Gael Mahony (1982)
 Estate of Clara N. Marshall (1943)
 Adalaide Sargent Mason Trust (1982)
 Linda Mason and Roger Brown (2021)
 Mass Development (2003)
 Mass General Brigham (2014)
 Alice L. McDougall Fund (2022)
 Estate of Ann G. McFarlane (2000)
 Ethel Fay McGuire Trust (1973)
 Thomas Melendez and Aixa Beauchamp
 (2013)
 Jack and Elizabeth Meyer (2021)
 MFS Investment Management (2014)
 David D. Moir Revocable Trust (1991)
 Estate of Arthur W. Moors (1950)
 Reinier Moquete (2014)
 Gertrude Morrison Trust (1965)
 Estate of John Wells Morss (1940)

Wilbert G. and Eunice Muttart Foundation
 (2007)
 Mrs. Robert B. Newman (2001)
 Nixon Peabody LLP (1997)
 Northern Trust (2006)
 Jeryl and Steve Oristaglio (2022)
 The Overbrook Foundation (1990)
 Francis Ward Paine Foundation, Inc. (1982)
 Estate of John Adams Paine (1967)
 Mary F. Parker (2004)
 Estate of Winthrop D. Parker (1967)
 Theodore G. Patterson Trust (2004)
 Estate of Mary F. Pearl (1997)
 Estate of Annie S. Penfield (1979)
 Phillip Perelmuter (2014)
 Janet S. Perkins Charitable Remainder
 Unitrust (2000)
 Philanthropic Collaborative, Inc. (2000)
 Estate of Blanche E. Philbrick (1965)
 Hetty R. Phillips Trust (1980)
 Estate of Mary N. Phillips (1974)
 Emma K. & Richard Pigeon Fund (2002)
 Estate of J. Christie Pingree (1957)
 David R. Pokross, Jr. (1996)
 William J. and Lia G. Poorvu (1997)
 Robert O. Preyer Charitable Lead Unitrust
 (1992)
 Estate of Carrietta W. Proverbs (1984)
 Bernard and Suzanne Pucker (2016)
 Esther Frances Quinn Trust (1995)
 Mr. Robert A. Radloff (2000)
 Estate of Bertha J. Richardson (1975)
 Estate of Frank L. Richardson (1975)
 Estate of Charles E. Riley and Agnes Winslow
 Riley (1972)
 Mabel Louise Riley in memory of Charles
 Edward (1972)
 Harry & Minnie Rodwin Memorial Fund (1975)
 Harriet Rogers Unitrust (1990)
 Professor and Mrs. Walter J. Salmon (1997)
 Florence M. Scott Trust (1971)
 David and Marie Louise Scudder (2001)
 Estate of Helen S. Sharp (1966)
 Estate of Frank R. Shepard (1954)
 Arthur L. Sherin Trust (2008)
 Estate of Anne G. Shewell (1984)
 J. de Vere Simmons Trust (1985)
 Dana P. & Maude E. Simpson Memorial Fund
 (2002)
 Alice Wilder Smith in memory of Frank
 Langdon Smith (1968)
 Edson B. Smith Trust (1984)

Estate of Eleanor Smith (1986)
 Irene C. Smith Trust (1975)
 Reynolds R. and Pamela M. Smith (2006)
 Florence Snelling Trust (2006)
 Dr. William Davies Sohie, Jr. (1990)
 Helen Spaulding (1990)
 Spaulding-Potter Charitable Trusts (1972)
 Estate of Francis M. Stanwood (1961)
 Estate of Mary P. Stone (1948)
 Stephen and Sybil Stone Foundation (2003)
 Gertrude T. Taft (1956)
 Tech/Ops, Inc. (1982)
 Frank B. Thayer Fund (2002)
 Tiny Tiger Foundation (2001)
 Estate of Lenna R. Townsend (1952)
 Margaret Castle Tozzer Trust (1978)
 United Asset Management Corporation
 (1997)
 Julio E. Vega (2017)
 Estate of Willis S. Vincent (1940)
 Herb and Charlotte Wagner (2015)
 Clara Wainwright (1998)
 Wallace Foundation (1998)
 Estate of John M. Ward (1927)
 Leo Wasserman Foundation (1997)
 Estate of Madeline Cobb Webber (1973)
 Edwin S. Webster Foundation (2000)
 Estate of Louise M. Weeks (1944)
 David and Louise Weinberg (2021)
 Estate of Arthur W. Wheelwright (1963)
 Estate of Stetson Whitcher (2008)
 Estate of Joseph A. White (1979)
 Estate of Edward E. Williams (1950)
 Estate of Lizzie A. Williams (1951)
 Estate of Mary Denny Williston (1998)
 Winston Salem Foundation (1991)

Our Legacy Societies

TODAY AND INTO THE FUTURE

These donors created a major legacy at the Boston Foundation because they are deeply committed to supporting our city and region today and into the future. We thank these generous donors and honor them here.

OUR CENTENNIAL SOCIETY

The following donors have confirmed legacy commitments of \$1 million or more to build Greater Boston's endowment fund—the Permanent Fund for Boston.

Anonymous (13)
James F. Becker and Randal D. Rucker
Rick and Nonnie* Burnes
Sy Danberg
Belden, Pamela, and Andrew Daniels
Marilyn J. Darling
Richard and Marcia DeWolfe
Ruth Dinerman
Sue Donaldson
Michael and Barbara Eisenson
Judith and John Felton
David J. Elliott and Hungwah Yu
Grace and Edward Fey
Atsuko and Larry Fish
Peni Garber
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Jane Wegscheider Hyman
Louis and Marcia Kamensky
John C. Keogh

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Jack Mitchell
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Robert A. and Veronica S.* Petersen
Sam Plimpton and Wendy Shattuck
Joseph G. Prone Foundation
Robert A. Radloff
Marilyn and Robert Root
Lindsey A. Rosen
Dr. David and Mrs. Judith M. Schurgin
Sandra M. Stark
Mark and Grace Sullivan

*Deceased

“When we thought about leaving a community legacy, we knew the Boston Foundation could determine—50 years from now or 100 years from now—where Boston's needs will be greatest. We're glad our contribution will carry on forever and always be relevant.”

BILL NIGREEN AND KATHLEEN MCDERMOTT
CENTENNIAL SOCIETY DONORS

OUR LONGLEY LEGACY SOCIETY

The following donors have confirmed legacy commitments of up to \$999,999 to further build Greater Boston's endowment—the Permanent Fund for Boston.

Anonymous (7)
 Frank X. Addonizio
 Howard and Carol Anderson
 Hanna and James Bartlett
 Barry Bluestone and Mary Ellen Colten*
 Janine Bouchard
 Margaret A. Bush
 Barry B. Corden
 Constance and Lewis* Counts
 R.J. Donofrio
 Thomas M. and Catherine Axon* Elder
 Ellen Epstein and Rose* and Lee* Epstein
 Paul and Patricia Gannon
 Paul S. Grogan
 Kate Guedj

Dean T. Hara and
 Congressman Gerry E. Studds*
 Ann S. Higgins
 Helen M. Jones
 Jonathan and Judy* Keyes
 Anne F. Kilguss
 Peter and Stephanie Kurzina
 Deborah Little Wyman
 Bernadette M. MacPherson
 Barbara and Myron* Markell
 Rabbi Bernard H. Mehlman
 Timothy and Deborah Moore
 Herbert E. Morse and EllenJoy Fields
 Katharine S. Nash
 Beatrice and Peter Nessen

Ruben D. Orduña
 Jennifer Jossie Owens
 Gary and Natalie Robinson
 Anthony Mitchell Sammarco
 Richard and Leanna Sands
 Wendy C. Sanford
 Daniel I. Sherman
 Charles E. and Deana M. Shirley
 Binkley and Paula Shorts
 Scott E. Squillace, Esq.
 Charles A. Walsh III
 Ann and Hans Ziegler

*Deceased

OUR ROGERSON LEGACY SOCIETY

The following donors have documented their intention to carry out their legacy giving through Donor Advised Funds or Designated Funds at the Boston Foundation.

Anonymous (32)
 Mary Lee T. and Peter C. Aldrich
 G. Thomas and Allison Aley
 Barbara Jane Anderson
 Diane DeSerras Arenella
 Geoffrey D. Austrian
 Lisa and Stephen Ayres
 Sherwood E. Bain
 Mary Barber
 Doreen B. Biebusch
 Thomas W. Bird
 Jacob F. and Barbara C. Brown
 Rick and Nonnie* Burnes
 Margaret A. Bush
 Frank and Ruth Butler
 David and Gay Campbell
 Helen T.W. Chen and Keith R. Ohmart
 Edward A. and Penny Cherubino
 Marilyn J. Darling
 David S. and Shirley G.* Dayton
 Leslie F. DiBona
 Sue Donaldson
 R.J. Donofrio
 Anita Maria Elliott
 Ellen Epstein and Rose* and Lee* Epstein
 Joe Fiorello
 Sandra and Philip* Gordon
 Andrew C. Goresch

Dr. G. Anne Guenzel
 Charlotte I. Hall
 Marilyn L. Harris
 Barbara Hauter Woodward
 William G. Henderson and
 Carol M. Brogna Henderson
 Petie Hilsinger
 Kenneth D. and Cynthia L. Holberger
 Chuck Holland
 Helen R. Homans
 Marjorie Howard-Jones
 Karen A. Joyce and John Fitzgerald
 Ruth G. Kahn
 Gary P. Kearney, M.D. and Susan Kearney
 Thomas A. Kershaw
 G. P. Paul Kowal
 Virginia Kropas
 Frances J. Lee-Vandell
 Donald J. and Susan Kelley MacDonald
 Meredith and Elsa McKinney
 The McLachlan Family
 Rabbi Bernard H. Mehlman
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 Charles Fessenden Morse
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 Carl H. Novotny and Rev. Judith Swahnberg
 Mark A. and Judith A. Osborne
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Nancy E. Peace
 Robert A. and Veronica S.* Petersen
 Warren Radtke and Judith Lockhart Radtke
 Chris Remmes
 Richard L. Robbins
 John A. Russell
 Wendy C. Sanford
 Margaret Schmidt and Kenneth Danila
 Binkley and Paula Shorts
 Ellen L. Simons
 Edward G. (Ted) and Nancy L. Smethurst
 Cheryl H. Smith
 Scott E. Squillace, Esq.
 David F. and Patricia R. Squire
 Anne B. Stone
 Anne Thompson
 Libby and Sidney* Topol
 Alan and Pamela Trefler
 Joy E. Van Buskirk
 Peter S. and Pamela L. Voss
 Robert R. Wadsworth and
 Catherine E. Moritz
 Inge J. Wetzstein
 Constance V. R. White
 Eric S. and Linda H. White
 Jeffrey and Theresa Whitehead
 Michael N.* and Mary M. Wood
 *Deceased

OUR DIVERSE RESOURCES

OUR FUNDS

*Our funds
support
nonprofit
organizations
in every
sector.*

Funds Within the Permanent Fund for Boston

OUR UNRESTRICTED FUNDS

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

Many were established by families or organizations in honor of loved ones and treasured colleagues.

The year each fund was established is in parentheses and new funds are bolded.

Emily Tuckerman Allen Fund (2006)

Anonymous Fund X (2018)

Area IV Fund (2015)

Geno A. Ballotti Fund (1985)

Irene W. Bancroft Fund (1997)

James R. Bancroft Trust Fund (1985)

Harriett M. Bartlett Fund (1988)

J. E. Adrien Blais Fund I (1968)

Dorothea M. Blizzard Legacy Fund (2022)

The Barry Bluestone and Mary Ellen Colten Legacy Fund (2017)

Franklin S. & Cynthia B. Browning Fund (1989)

Frank B. & Watson G. Cutter Fund (1984)

James Dean Fund (1947)

Katherine E. Dooley Fund (1998)

Herbert and Lucy Fields Fund (2009)

Edward Glines Fund (1939)

Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2010)

Nathaniel Hooper Fund (1939)

Grace A. Jacobs Fund (1989)

Karoff Fund for Leadership in Philanthropy (2017)

Michael B. Keating Fund for Justice and Social Equity (2016)

Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2007)

Polaroid Fund (1997)

Ruth M. Reiss Memorial Fund (1997)

Samuel H. & Lizzie M. Robie Trust Fund (1983)

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

Robert Wadsworth Fund for the Future of Boston (2008)

OUR FIELD OF INTEREST FUNDS

The following funds are directed to a particular issue or area of concern. Many were established by families

or organizations wanting to honor relatives or colleagues who were deeply committed to the issue the fund supports.

The year each fund was established is in parentheses and new funds are bolded.

Accelerating Investment for Health Communities (AIHC) (2020)

Afghan Refugee Fund (2022)

Solomon Agoos Fund (1987)

Arts Fund (1998)

Edith Allanbrook Fund (2003)

Boston Parks Access Fund (2003)

Free for All Endowment Fund (2014)

Edward Hyde Cox Fund (2001)

Anna Faith Jones Arts Fund (2001)

MassDevelopment Arts Fund for Community and Economic Development (2003)

Stephen and Sybil Stone Arts Fund (2003)

Brother Thomas Fund (2008)

Brooks White, Jr. Memorial Fund (2001)

Edith M. Ashley Fund (1961)

Asian Community Fund (2019)

Diane Heath Beever Memorial Fund (2008)

J. E. Adrien Blais Fund II (1968)

J. E. Adrien Blais Fund III (1968)

BOSTnet Fund (2020)

Emily Budd Fund (1961)

Business Equity COVID-19 Emergency Fund (2020)

Business Equity Fund (2018)

Camping Associates of Roslindale & Milton Fund (1982)

Carpe Diem Fund (2021)

Chelsea 2021 Fund (2021)

Communities Care WNY Respite Pilot (2020)

Coolidge Christian Education Fund (1994)

COVID-19 Equity and Entrepreneurship Fund (2020)

Covid-19 PPE Fund (2020)

COVID-19 Response Fund (2020)

John Frederick Crane Fund (2022)

Curtis International Council Fund (2000)

David W. Cushing Fund (1988)

DACA Dream Fund (2018)

Mabel Walsh Danforth Fund (1950)

Virginia Herrick Deknatel Fund for Children's Services (2002)

Major Arthur M. Diggles Foundation Fund (1993)

Annie S. Dillaway Fund (1966)

Kate Ellis Fund (1954)

Equality Fund (2012)

Mary C. Farr Arts Fund (2006)

The Flow Fund (2015)

Forward Fund (2021)

“When the lack of equity experienced by businesses of color was the focus of media attention during the pandemic, people were desperate to help. I was proud that through the Business Equity Fund, we were already doing something important.”

LIZETTE PEREZ-DEISBOECK

MEMBER OF THE BUSINESS EQUITY FUND INVESTMENT COMMITTEE

Frederika Home Fund (1980)
General Support Fund for Education (1989)
Elizabeth D. Goldsmith Fund for Families (2011)
Hack.Diversity (2017)
Charles W. Hapgood Trust Fund (1987)
Harcourt Family Fund (2002)
Mary Harris Fund (1941)
Grace L. Holland Fund (2008)
Theodore C. Hollander Trust Fund (1929)
Invest for Better Fund (2021)
Jacoby Club of Boston Fund (1984)
Jamaica Plain Dispensary Fund (1963)
Charles Frederick Joy and Dora Marie Joy Fund (1993)
Vera Kilstein and Sarra Victorine Fund (2019)
King Boston (2018)
Kraft Family Non-Profit Emergency Fund (2016)
Louise P. Kush Fund (2016)
Lahey Family Fund (2021)
Edith Shedd Larsen Fund (1963)
Latino Equity Fund (2012)
MAAH Stone Book Prize Fund (2019)
Maude A. MacNaught Fund (1980)
Azad & Doris Maranjian Charitable Trust Fund (2009)
Massachusetts Civic League Fund (1984)
Massachusetts United for Puerto Rico (2018)
Willis Munro Fund (1990)
Harry L. Nason Fund (1954)
Florence Arnaud Newton Fund (1956)
Grace G. North Fund (1955)
Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006)

Parachute Legacy Fund (2022)

The Paul S. Grogan Fund for Civic Leadership (2021)
Norman Everett Pearl Fund (1997)
Janet S. & George T.B. Perkins Fund (2000)
Petersen Family Fund for the Environment (2016)
Louise Phillips Bequest Fund (2003)
David R. Pokross Fund for Children in Need (1997)

Fund for Reproductive Health (2022)

Alice F. Rosenquist Fund (1985)
Fund for Self-Reliance (1989)
Louis Agassiz Shaw Fund (1992)
Katherine Dexter Shelman Fund (1955)
Arthur L. Sherin and Frances C. Sherin Fund (2003)
The Shout Syndicate Fund (2018)
Sophia Snow Fund (1949)
Helen & Marion Storr Fund (1986)
Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994)
Carroll J. Swan Memorial Fund for Children's Charities (1936)

Washtenaw County Expansion (2022)

Nelson E. Weeks Fund (1938)
Fanny Wharton Fund (1920)
Katherine C. Wheeler Fund (1988)
Fund for Preservation of Wildlife & Natural Areas (1994)
Herbert Farnsworth Fund (1994)
Hollis D. Leverett Memorial Fund (1994)
Ruth and Henry Walter Fund (2011)
Arthur L. Williston and Irene S. Williston Trust For Education (1954)
Mary Denny Williston Fund (1970)

WNY Expansion (2022)
Gladys W. Yetton Fund (1970)

Our Donor Advised Funds

The year each Donor Advised Fund was established is in parentheses and new funds are bolded.

GIVING THROUGH US

In addition to our own grantmaking and civic leadership, the Boston Foundation supports the philanthropy of hundreds of individuals, families and businesses through Donor Advised Funds. Those behind these funds are active philanthropists. We are proud to work closely with them so that their giving has as much impact as possible.

3C Fund (2013)
63 Marlborough Street Fund (1985)
A & E Educational Quest Fund (2005)
The Aberdale Family Foundation (2020)
Walter and Alice Abrams Family Fund (2006)
Abromowitz/Ruttenberg Family Fund (2001)
Acacia Fund (2005)
Adler Family Fund (2006)
Adlib Foundation (2010)
Adopt-A-Statue Endowment Fund (1988)
Adopt-A-Statue Program - Bill Russell Legacy Project (2014)
The Ajax Foundation (2020)
AK Family Charitable Fund (2021)
The Akili Fund (2016)
James F. Alenson Memorial Fund (2007)
Aley Fund (2010)
Aliad Fund (1994)
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1996)
Arthur and Nancy Altman Charitable Fund (2022)
Altus Dental Insurance Company Fund (2020)
Amazon Boston Community Fund (2021)
George and Nedda Anders Fund (1992)
Barbara Jane Anderson Fund (2000)
Ashley Anderton Memorial Fund (2017)
Selma and Bayness Andrews Fund (2007)
Anony Fund (1999)
Ansara Family Fund (2006)
Anthes Weitz Family Fund (2015)
Anthropologists' Fund for Urgent Anthropological Research (1996)
Arba Lifnot Boker Fund (1993)
Arch Stanton Charitable Fund II (2016)
Zamawa Arenas and Murray Forman Fund (2021)
Armony Erel Charitable Fund (2009)
Jennifer Winn Aronson Philanthropy Fund (2019)
Artful Impact Fund (2020)
Atalaya Fund (2013)
Atlantic Fund (1998)
Ausschnitt Fund (2005)
The Christopher A. Avery Charitable Fund (2020)
Victoria J. Avery Charitable Fund (2015)
Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)
Axelrod/DeFranceschi Charitable Fund (2022)
Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
The Ayres Family Fund (2020)
Back Porch Fund (2015)
Bagley Family Fund (2016)
Bain Capital Relief Fund (2018)
M. Baldwin Family Fund (2016)
John & Judith Barber Fund (2003)

DONOR ADVISED FUNDS

Richard Allan Barry Fund (2003)
Hanna and James Bartlett Fund (2015)
Baudanza Family Fund (1998)
Baupost Group Charitable Fund (2004)
Beachcomber Fund (2008)
Bellevue Fund (2000)
Bellinger Fund (2008)
Benjamin Foundation (2006)
William D. & Mary E. Benjes Fund (1985)
Jane Bernstein Fund (2006)
Best Doctors Charitable Foundation (2011)
Charlotte Saltonstall Bigham Memorial Fund (2005)
Bird Fund (1999)
Bill Bither Charitable Fund (2014)
Bitpipe Legacy Fund (2005)
Black Philanthropy Fund (2009)
NICSA/William T. Blackwell Scholarship Fund (1995)
Emmanuel and Jane Blitz Fund (1993)
Blue Piano Fund (2018)
Tom and Lisa Blumenthal Family Foundation (2006)
Joan T. Bok Fund (1998)
Bolze Family Fund (2013)
The Bonomo Family Fund (2017)
David Bor and Henrietta Barnes (2018)
BPE/Bank of Boston 200th Anniversary Fund (1983)
Braverman Family Fund (1993)
Bride-McEnany Fund for Empowering Women (2014)
Anne C. and David J. Bromer Fund (2021)
Bronner Charitable Foundation (2006)
Brooke Family Donor Advised Fund (2008)
Peter W. and Ruth H. Brooke Fund (2004)
The Christine A. Brown Fund (2019)
Brumme Family Fund (2018)
Bill and Barbara Burgess Fund (2003)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1989)
Kairos Butler Fund (1994)
Butler's Hole East (2012)
Butler's Hole Fund (1995)
Butler's Hole North (2012)
Butler's Hole South (2012)
C & K Foundation Fund (2000)
Norman L. Cahners Fund (1984)
The Cali-Evett Family Fund (2020)
Campbell Foundation Fund (2003)
Krystle Campbell Memorial Fund (2013)
James E. Canales and James C. McCann Fund (2018)
Carbonite Charitable Fund (2018)
The Carlson Stone Foundation (2020)
Margaret W. Casey Fund (1987)
John J. Cattaneo III Fund II (2017)
Celebrate Zoe's Life Fund (2021)
Champa Charitable Foundation Fund (2003)
Charlesbank Donor Advised Fund (2020)
Charlestown Benevolent Fund (2011)
Charlestown Fund (2009)
Chasin/Gilden Family Fund (2000)

“The Boston Foundation knew of my interest in affordable housing and introduced me to Meridith Levy, who leads the Boston Neighborhood Community Trust. Together we helped save a building that has six affordable units. And it’s only the beginning!”

ANNE BROMER

DONOR ADVISED FUND DONOR

Charles Ezekiel and Jane Garfield Cheever Fund I & II (2006)
Chelsea Community Fund (1998)
Joyce Chen and Helen Chen Foundation Fund (1995)
Stanley and Josephine Chen Legacy Fund (2022)
Chertavian Family Fund (2006)
Christ on Earth Fund (1989)
Michael W. Christian Memorial Fund (1987)
Dr. & Mrs. B.U. Chung Fund (2000)
Chung Family Fund (2000)
Churchill Family Fund (1997)
Circle Fund (1998)
CJE Foundation Fund (2007)
Clark Family Fund (2011)
Clementine Fund (2015)
Coit Family Fund A (2002)
Colby Charitable Fund (1981)
Colin's Joy Project (2019)
Colony Road Fund (1997)
Commonwealth Children's Fund (2018)
Condor Street Fund (1989)
Karen and Brian Conway Fund (2017)
The Pat Cooke Fund (2016)

Coolidge Family Fund (1982)
 Cooper Leeser Family Fund (1997)
 The Ann & Will Cordis Fund (2019)
 Stephanie Dodson Cornell and James Cornell Family Foundation (2016)
 Corvelli Fund (1996)
 Constance and Lewis Counts Fund (1991)
 Demetrios G. C. & Kimberly A. Coupounas Fund (1997)
 George D., Angelyn K. & Demetrios G.C. Coupounas Fund (1995)
 Christopher H. Covington and Bonnie G. Covington Fund (2020)
 Jessie B. Cox Charitable Trust Fund (2009)
 Cox Legacy Fund (2010)
 Coxhead Family Foundation (2017)
 Joseph and Nancy Craven Family Fund (2014)
 Cregan Charitable Fund (2005)
 Crosby Family Fund (2000)
 Kate Crozier Fund (2008)
 Cuming Family Endowment Fund (1996)
 Tarrant and Laura Cutler Charitable Gift Fund (2009)
 John Da Silva Memorial Fund (1989)
 Dainger Fund (1998)
 Dammann Boston Fund (2004)
 Lawrence B. and Elisabeth T. Damon Charitable Fund (2014)
 Darling Family Fund (1983)
 Jeff and Dana Davis Charitable Fund (2020)
 Kimberly Dawson Charitable Fund (2012)
 John H. Deknatel Family Fund (2010)
 Marshall and Laura Derby Charitable Fund (2008)
 Rebecca Derby and Evan Morton (2008)
 Sarah Derby and Gary MacDonald (2008)
 DeWolfe Family Fund (2001)
 Dibble Family Fund (2006)
 Larry DiCara Fund (2006)
 Dillon Fund (2005)
Michael P. Dillon (2022)
 Dintersmith-Hazard Foundation Fund (2007)
 Doe Noordzij Fund (2002)
 Eugene B. & Nina L. Doggett Charitable Fund (2000)
 Eric Dolinski & Kristen Ploetz Fund (2015)
 Marthanne Dorminy Fund (2015)
 Drane Center Fund (2002)
 Douglas Drane Family Fund (1984)
 Dretler Family Fund (2018)
 Dryfoos Family Fund (2013)
 William J. Ducas Charitable Fund (2012)
 Bill and June Duggan Fund (2017)
 Rebecca F. Duke Charitable Fund (2016)
 Dupre-Nunnely Charitable Gift Fund (2007)
 The Eagle Fund (2001)
 Ecclesia Mission Fund (2013)
 Edgerley Family Fund (2012)
 Gregory J. Egan Donor Advised Fund (2019)
 Egozy Fund (2007)
 Eisenson Family Fund (2005)
 Stephen J. Elledge (2017)
 Elliott and Yu Education Fund (2012)
 Ellis Family Fund (2003)
 Elphaba Fund (2014)
 Elpus Family Fund (2015)
 Elving-Carr Family Fund (2016)
 Employment Retention Fund (2004)
 The Ethic, A Wealth Bank Fund (2021)
 Ethics Trust Fund (1994)
 Connor Evans Fund (2018)
 Evans Family Fund (2000)
 Norris and Constance Evans Family Charitable Fund (2000)
 Taylor Evans Fund (2018)
 The Ewing Family Fund (2014)
 Faber Daeufer & Itrato Fellowship Program (2017)
Fall Family Fund (2022)
 Peter and Ellen Fallon Fund (1998)
 The Farlovia Fund (2017)
 Carol Fazio Charitable Fund (2011)
 The Fialkow Family Foundation (2020)
 First Principle Fund (2006)
 Fish Family Fund (2010)
 The Donald R. and Barbara A. Fisher Family Charitable Fund (2020)
 Fishreys Family Philanthropic Fund (2000)
 Jack Florey Fund (2005)
 Flower Hill Fund (2012)
 Foote-Richards Family Foundation (2014)
 Footpath Fund (2019)
 Forshey Family Fund (1998)
 James & Audrey Foster Charitable Foundation (2018)
Four Lucky Dogs (2022)
 Free for All Concert Fund (2011)
 Niki & Alan Friedberg Fund (1987)
 Fulkerson Family Fund (1999)
 Lyle W. Fulkerson Fund (1999)
 Sarah Fulkerson and Robert Le Roy Family Fund (1999)
 Fuller Trust, Inc. Fund (2010)
 Future Fund (2006)
 Gabrieli Family Fund (1998)
 Galilean Fund (2008)
 Ganesh Fund (2002)
 Gannon Family Charitable Fund (2004)
 Gannon Family S.U.N. Fund (2010)
 Garuda Fund (2008)
 Brad Gatlin Family Fund (1996)
 Gaudette Family Fund (2000)
 The Dana Gedvila Fund (2021)
 The Gene Pool (2021)
 Gergen Family Fund (2010)
 Gilbert Fund (2008)
 Ginsberg/Kaplan Fund (2011)
 Giudice Family Fund (2012)
 Glassman Gale Family Fund (1985)
 John & Ethel Goldberg Fund II (1984)
 Golden Family Fund (2001)
 Diana and Daniel Goldman Family Foundation (2020)
 Elizabeth Goldman Foundation (2021)
 Kate Goldman Foundation (2021)
 Rachel Goldman Foundation (2021)
 Goldstein-Allen Fund (2019)
 Peter G. Gombosi Memorial Fund for Autism Research and Services (2006)

DONOR ADVISED FUNDS

The Goodman-Swindell Family Foundation (2015)
Goodworks Fund (2003)
Gordon Educational Fund (2002)
Gordon Place Charitable Fund (2012)
Sandra & Philip Gordon Family Foundation Fund (2002)
Laurie Gould and Stephen Ansolabehere Fund (2010)
Gravelley Springs Fund (2006)
Green Fund (2011)
Greenhill Family Charitable Fund (2014)

Greyolivia Fund (2022)

Grogan Fund (2012)
Elizabeth and Phillip Gross Family Foundation (2015)
Patricia H. Gross Fund (2000)
Grunebaum Charitable Fund (2007)
Gualala Fund (1991)
Guenzel-Pieters Family Fund (2009)
Charles & Dorothy Gullickson Fund for Social Change (1999)
Jay Habegger Fund (2005)
Belle Linda Halpern Family Fund (2013)
The Kathryn Hannigan Fund (2019)
The Matthew J. Hannigan Fund (2019)
Ken and Becky Hansberry Fund (2001)
Charlotte C. Hart Family Fund (2002)
Kirk B. Hartung Fund (2021)
Caitlin Haught Foundation (2021)
J. Allan Hauter Memorial Fund (2004)
Head Of The Charles Regatta Fund (2021)
Hebb Charitable Fund (2004)
HEIRS Fund (1997)
Henderson Fund (1997)
The Hesperia Fund (2016)
Hewitt Family Charitable Trust Fund (1994)
The Hidden Garden Fund (2016)
Hidden History Fund (2017)
Higgins Endowed Fund (2012)
Higgins Family Fund (2014)
Ann S. Higgins Fund (2002)
Hildreth Stewart Fund (2013)
Joanne K. Hilferty Fund (2017)
Lucius T. Hill III and Wendy Y. Hill Fund (2001)
Petie Hilsinger Fund (2000)
Marc Hirschmann Foundation Fund (2002)
Hoffman Fund (1987)
Holberger Family Fund (1994)
Holland Family Fund (1994)
Emily C. Hood Fund (2012)

The Emily C. Hood Fund (2022)

Gilbert H. Hood Family Fund (1981)
Robert Hooper Family Fund (2005)
The Hot Chocolate Fund (2018)
Hourless Fund (1998)
Hamblin L. Hovey Institute Fund (1983)
Howe Family Fund (2021)
Hoyt Family Fund (2001)
Hunt Fund for Charlestown Children (2002)
Brian R. Hyde Foundation (2018)
Income Research and Management Charitable Fund (2014)

Interstitial Fund (2010)
The Irza-Leggat Family Charitable Gift Fund (2018)
J. Jill Compassion Fund (2002)
Jacks Family Fund (2021)
Mitchell & Diane Jacobs Fund (1999)
Jade Fund (2008)
JAHLEBE Fund (2002)
The Jampart Fund (2020)
JDJ City Fund in honor of Doreen Biebusch (2021)
The Jerome Avenue Fund (2021)
Jewel Family Fund (2017)

Jin and Xu Family Charitable Fund (2022)

Jochkan Charitable Fund (2002)
Julia and Peter Johannsen Charitable Fund (2016)
Samuel Lamar Jordan Trust Fund (2001)
The Joy Fund (2017)
Jumping Rock Fund (2001)
Louis and Marcia Kamensky Donor Advised Fund (2010)
Albert J. & Diane E. Kaneb Family Fund II (1997)
Beton M. Kaneb Fund (1984)
Louis Kang Charitable Gift Fund (2021)
Martin & Wendy Kaplan Fund (2007)
Kaplan-Barletta Family Fund (2018)
Howard Kassler Family Fund (2000)
Kaufer Family Charitable Giving Fund (2005)
Kaye Charitable Fund (2004)
John & Anne-Marie Keane Foundation Fund (1998)
Keewaydin Fund (2002)
Sabina F. Kelly Catholic Charitable Fund (1992)
Kensington Capital Children's Fund (2002)

Kensington Capital Philanthropies – U of U Impact & Prosperity Building Campaign (2022)

Keogh Family Fund (2001)
Justin Kern Foundation (2022)
The Kidder Conservation/Rescue Fund (2005)
Kidder Smith Fund (2003)
M. R. Kidder Charitable Fund (2005)
The Caren and Tom Kilgore Charitable Trust (2016)
Kindling Fund (2012)
Bert King Fund (2016)
John Thomas Kittredge and Charles R. Morehead Fund (2011)
KJN Family Fund (1998)

Abram & Debra Klein Family Fund (2022)

Kluchman Family Fund (1997)
Allen and Elizabeth Kluchman Fund (1997)
Klureza Family Fund (1997)
Knox Family Fund (2018)
Pamela Kohlberg Fund (1995)
The Margot Elizabeth Koslosky Memorial Fund (2020)
Stephen P. Koster Fund (1986)
Ronni Sachs Kotler Family Fund (2007)
Roger and Lisa Krakoff Family Fund (2018)
Kravitz Family Fund (1994)
The Kritzman-Gorman Charitable Fund (2020)
Krivickas Family Fund (2007)
Paul and Mimi La Camera Charitable Fund (2018)
Gregory and Deborah Laham Family Charitable Fund (2011)
Lisa and William Lahey Fund (2017)

“We established the Black Philanthropy Fund as a Donor Advised Fund at the Boston Foundation because we felt it would be the right place not only to manage our money but to develop a relationship—as a funding partner, a programmatic partner and a thought partner.”

WENDELL KNOX
DONOR ADVISED FUND DONOR

Jay R. and Carol B. LaMarche Family Charitable Trust (2013)
LandsEnd Charitable Fund (2018)
Lash Family Charitable Fund (2014)
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2006)
The J. & S. Lawrence Family Fund (2018)
Leading By Example Fund (2015)
Paul and Mary Lee Fund (2014)
Roger & Clarissa Lee Family Fund (2010)
Thomas E. & Barbara B. Leggat Fund (1987)
Jo-Ann and Martin Leinwand Fund (1987)
Edward J. LeMay Fund (2019)
Lisa Harbury Lerner Memorial Fund for Flora, Fauna and Mental Health (2021)
Colman & Carol Levin Fund II (2017)
The Karen and Howard Levine Family Fund (2004)
Levitt Family Fund (2001)
Light-Curtin Fund (2017)
The Shannon Liss-Riordan Family Fund (2020)
John S. Llewellyn, Jr. Community Assistance Fund (1997)
Marjorie L. and James M. Lober Fund (2010)
LOC Fund (2009)
Joan Locatelli Foley Memorial Fund D (1997)
GC & JW Lodge Fund (2001)
LogMeIn Charitable Fund (2019)
Longfield Family Foundation (2012)

Sherrie A Lookner Memorial Fund for Early Care and Education (2022)

Loomis Sayles Charitable Fund (2008)
Lord-Buck Fund (1996)
Bruce Lunder Fund (1983)
John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
Donald J. & S. Kelley MacDonald Charitable Fund (1999)
Magic Penny Fund (1998)
Mahoney Family Fund (1984)
The Zachary Mandel Memorial Fund (2021)
Mann Family Fund (2011)
William G. Markos Fund (1983)
Evelyn A. Marran Fund (1984)
Marston Family Fund (2019)
Martin Fund (1998)
Kumi & Bill Martin Foundation (2019)
MasksOn.org Fund (2020)
Mason-Brown Fund (2008)
Massachusetts Family Child Care Emergency Fund (2020)
Match School Scholarship Fund (2008)
Joan S. Mathews Charitable Fund (2015)
Karen Mauney-Brodek Fund (2019)
Eric and Sue May Charitable Fund (2012)
May-McClain Charitable Gift Fund (2012)
Mayel Fund (1982)
Austin and Tiverton McClintock Gift Fund (2014)
Alice L. McDougall Donor Advised Fund (2015)
Richard & Judith McGinnis Fund (2000)
McNeill Family Foundation (1998)
McNulty-Weiss Fund (2020)
McSweeney Family Charitable Fund (2010)
Medical Research Fund (1993)
Emily & Bernard H. Mehlman Fund (2003)
Anmol Mehra Fund (2020)
Melendez & Beauchamp Family Fund (2018)
Mellowes Fund (1998)
Thomas M. Menino Fund for Boston (2014)
Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1999)
Meyer Foundation (2007)
Allan Meyers Fund (2001)
Michon Family Fund (1987)
Mid-Century Fund (2005)
Milford Street Fund (2015)
Mill River Foundation Fund (2004)
Gabrielle J. Miller Donor Advised Fund (2005)
The Mills Family Charitable Fund (2017)
Mimecast Charitable Fund (2018)
Anita L. Mishler Education Fund (1984)
The Mission Fund (2019)
Moccasin Brook Fund (2000)
The Modi Family Pass The Luck Foundation (2012)
Molino Family Fund (2004)
Monadnock Fund (2002)
Deborah and Timothy Moore Family Foundation (2021)
Mormann Family Fund (2007)
Andy Morris and Lynne Salkin Morris Family Fund (2012)
Robert S. Morris Advised Fund (2001)
Sykes Moyer Fund (2005)

DONOR ADVISED FUNDS

Muddy Pond Trust Fund (1994)
Munger Family Fund (2002)
Bob & Alison Murchison Fund (2014)
Murphy Family Fund (2014)
The Murray Family Fund (2017)
Musicus (2018)
Mussafer Family Fund (2014)
Myrtle Field Fund (2005)
Mystic Harmony Fund (2001)
Mystic River Watershed Environmental Fund (2012)
Paul and Kathleen Nagle Family Fund (2007)
Leslie & Sandra Nanberg Charitable Foundation Fund (2002)
NEID Climate Change Giving Circle Fund (2018)
The Never Say Never Fund (2022)
New Beginnings/Kidder Fund (2005)
New Place (2018)
Next Door Fund (2006)
Nichols Foundation (2017)
Nichols Foundation West (2017)
Joan Nichols Family Fund (2017)
Michael J. Nichols Charitable Fund (2020)
The Nichols Philanthropy Fund (2017)
William H. Nichols Fund (2017)
Hannelore and Richard Noble Foundation (2022)
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 (1998)
O'Brien Family Fund (2007)
Barbara Rose O'Connor Charitable Fund (2018)
Vania K.E. O'Connor Fund (2019)
One Foot Plan (2015)
One Way Foundation (2020)
Orchard Hill Fund (2013)
The Oristaglio Foundation (2019)
Orpheus Fund (2003)
Osier (2022)
E. Ostroff Fund for Service (2017)
Owen Marie Fund (2013)
Louise Burnham Packard Charitable Fund (2021)
Palmer Family Fund (2016)
Morgan Palmer Foundation (1982)
John J. Pappenheimer Fund (1995)
Parachute Fund (2019)
The Park Family Charitable Fund (2014)
Parker Family Fund (2001)
Field Parker Fund (1997)
Partnership Fund in honor of Anna Faith Jones (2001)
Alfred Nash Patterson Foundation for the Choral Arts Fund (1980)
Payson Family Fund (2001)
Peaceable Kingdom Fund (1998)
Perkins Family Charitable Gift Fund (2022)
Perkins Improvements Fund – William (1996)
John A. Perkins, Jr. Fund (2001)
Robert C. Perkins Fund (2001)
Samuel Perkins and Nancy Reed Fund (1996)

Sheila and Sara Perkins Fund (1996)
Peter Fund (2001)
Petersen Family Fund (2002)
Philancon Fund (1990)
Katherine A. & Fannie Phillips Fund (1997)
Picard Family Fund (2000)
Michelle Picotte Foundation (2021)
Jamie Pierce & Rick Cresswell Fund (2003)
Karen Odessa Piper Charitable Gift Fund (2014)
The Players Legacy Fund (2020)
Plimpton - Shattuck Fund (2006)
Pluhar Family Fund (2014)
Renata Poggioli Fund (1992)
The Poler Family Foundation (2009)
Pool Family Fund (1998)
Poorvu Jaffe Family Fund (2019)
Poss Family Fund (1996)
Helen C. Powell Donor Advised Fund (2015)
Primary Care Progress Fund (2012)
Thomas & Mary Prince Family Fund (2001)
Joseph G. Prone Foundation (2014)
Donald and Frances Putnoi Charitable Fund (2007)
Peg Pyne Fund for Handicapped Access (1986)
Quid Nunc Fund (2002)
The Quin Impact Fund (2020)
Radtke Family Fund (1997)
Otto W. Ramstad Fund (1999)
Phyllis and Jerome Lyle Rappaport Fund (2016)
The Tuukka Rask Foundation (2014)
Bessye Bedrick Ravelson Fund (2003)
Ravichandran Foundation (2019)
Gene Record Fund (2002)
Sara Delano Redmond Fund (1996)
The Reidy/Andre Fund (2019)
Relief Fund for Immigrant Families (2021)
Remmer-Fox Family Fund (1996)
Reno Family Charitable Foundation (1999)
Edward S. Reynolds Memorial Fund (1985)
Rhyme and Reason Fund (2001)
Roberts Family Fund (1996)
Roberts-Belove Fund (2005)
Todd Robinson and Steven Farrell Fund (2013)
Robynhood Thanksgiving Fund (2003)
Rosedune Fund (1971)
Rosen Family Fund (2008)
Lindsey A. Rosen Fund (2011)
Rossiter Family Fund (2018)
Daniel and Brooke Roth Charitable Gift Fund (2008)
Rothman Charitable Fund (2014)
Rotman-Attardo Family Fund (2006)
Rubin Steinberg Charitable Fund (2020)
Rust Bowl Fund (1988)
Saffron Circle Fund (2006)
David Salten Fund (2008)
Samuelson Family Gift Fund (2013)
Risha C. and Paul A. Samuelson Fund (1982)
Sands Family Fund (2012)
The Tedd R. Saunders Family (2021)

Susan F. Schaeffer Fund (2014)
 Schawbel Family Fund (1995)
 Margaret M. Schmidt and Kenneth J. Danila Fund (2005)
Jami Schwartz Fund (2022)
 Joel Schwartz Family Fund (2001)
John & Janice Schwartz Family Fund (2022)
Marissa Schwartz Fund (2022)
 Charles S. and Zena A. Scimeca Charitable Fund (2004)
 September Fund (2001)
 A Servant's Heart (2014)
Preston Settles Memorial Fund (2022)
Seva Society (2022)
Shah Charitable Gift Fund (2022)
Shantayam Fund (2022)
 Shapiro/Fleishman Fund (2000)
 Douglas Boyd Sharpe Donor Advised Fund (2007)
 Shawkemo Fund (2001)
 Bob and Jean Sheridan Family Fund (2013)
 Sherman Family Foundation Fund (2005)
 Jon Shevell Cancer Fund (2011)
 Jon Shevell Children's Fund (2011)
 Jon Shevell Education Fund (2011)
 Shoe Box Foundation Fund (2004)
 Shot Fund (2020)
 Peter Sidewater Foundation (2017)
 Jean Karpas Siegel Fund (1995)
 Silvia-Chandley Fund (2014)
 John and Susan Simon Boston Foundation Fund (2007)
 Ellen L. Simons Fund (1998)
 Sixty-Nine Roses Charitable Foundation (2011)
 Skylight Fund (2000)
 Fay Slover Fund (2011)
 Ellin Smalley Fund (1988)
 Austin & Susan Smith Fund (2000)
 Clark R. and Trina H. Smith Family Fund (1991)
 Anna and Jack Sommers Family Gift Fund (2018)
 Sparky Foundation Fund (2004)
 The Sparsh Foundation (2019)
 Spector Fund (2002)
 Spencer Family Charitable Fund (2015)
 David F. Squire Family Fund (1998)
 STAG Industrial Charitable Action Fund (2021)
 Harvey & Shirley Stein Fund (2000)
 Meg and Don Steiner Charitable Fund (2021)
 Sternfeld Family Foundation (2020)
 Tracy Stewart Fund (2009)
 Jim Stiles & Randy Bird Charitable Trust (2019)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 James M. and Cathleen D. Stone Family Foundation (1996)
 Congressman Gerry E. Studds Fund (2007)
 Charles Sugnet Fund (1999)
 Joshua Sugnet Fund (1999)
 Suhrbier Family Fund (2006)
 Nancy L. Sullivan Fund (1990)
 Diane Sullivan-Villano Fund (1998)
 Sustainable Strategies 2050 Impact Fund (2020)
 Sylvan Fund (1986)
 TAF Device (2019)
 TechFoundation Fund (2003)
 Tempero Family Fund (2003)
 The Third Base Fund (2019)
 Marc Thompson & Maureen Conway Family Fund (2008)
 Thomsen Family Fund (2001)
 Susan and Michael Thonis Fund (2005)
 Thornton Albukrek Family Fund (2020)
 Scott and Jennifer Tobin Charitable Fund (2005)
 Toms Family Fund (2016)
 Trefler Fund (1997)
 Tusk Montgomery Charitable Giving Fund (2018)
 Upper Mill Fund (2019)
 Sarah Valentini Foundation (2020)
 Joseph Bishop Van Sciver Fund (1861-1943) (1998)
 Violet Iris Fund (2015)
 Ann & Robert von der Lippe Fund (1998)
 James and Margaret Wade Fund (1997)
 JH & EV Wade Fund (1991)
 Linda M. Walczak Children's Literacy Fund (2016)
 Waldron Charitable Fund (2018)
 Walker Fund (1999)
 The Walter/Capone Fund (2011)
 Ruth and Henry Walter Fund I, II & III (2011)
 J. H. Walton Family Fund (1987)
 Mitchell and Barbara Freedman Wand Charitable Fund (2014)
 Warner Charitable Gift Fund (2000)
 Anita Barker Weeks Charitable Gift Fund (2012)
 Gordon Weil, Jr. Fund (2010)
 Weiss Charitable Fund (2005)
 Weitzman-Bugbee Family Fund (2021)
 Janet White Memorial Scholarship Fund (2004)
 Whitehead - Sayare Fund (2008)
 Guy and Maggie Wickwire Fund (1990)
 James and Debra Wiess Fund (2013)
 Benjamin J. Williams, Jr. Fund (1987)
 Hope A. Williams Fund (1987)
 Natica R. Williams Fund (1987)
 Ralph B. & Margaret C. Williams Fund (1985)
 Ralph B. Williams, II Fund (1987)
 Williamson Charitable Fund (2016)
 The Windy West Fund (2016)
 Winkler Family Foundation Fund (2001)
 Winn Family Charitable Fund (2016)
 Wesley L. Winship Fund (1999)
 Winsor Foundation Fund (1989)
 Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 Christopher and Debra Wysopal Charitable Trust (2018)
 Leila Yassa & David Mendels Fund (2001)
 YotMe Donor Advised Fund (2018)
 Zabin Charitable Fund (2001)
Dr. Joan S. Zofnass Charitable Fund (2022)
 T. Zouikin Charitable Fund (2004)
 Zug Family Fund (2009)
 Zwanziger Fund (2007)
 The Zwanziger-Hoffman Fund (2018)

Our Supporting Organizations

Through their affiliation with the Boston Foundation, these funds maintain their public charity status while their founders remain deeply involved in decisions about where grants go each year. The year the fund was established is listed in parentheses and new funds are bolded.

Bruce J. Anderson Foundation (1981)

Cromwell Harbor Supporting Organization, Inc. (2022)

Deshpande Foundation (2007)

Horace Moses Foundation (1995) to Support Junior Achievement

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

Our Scholarship Funds

The year the fund was established is listed in parentheses.

The Laura Ahlbeck Memorial Scholarship Fund (2017)

Benjamin Foundation Scholarship Program (2017)

Blair Family AvalonBay College Scholarship (2013)

George C. Brackett STEM Scholarship (2016)

Paula Marie Danforth Memorial Scholarship Fund (1990)

deVille Fund (1995)

Eagle Bank-Frank E. Woodward Scholarship Fund (1986)

Americo J. Francisco Scholarship Fund (1994)

Albert Francis Gilmartin Memorial Scholarship Fund (2005)

Gladwood Scholarships (2018)

Robert L. Gould Fund (1988)

Greatrex Scholarship Fund (1989)

Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)

William R. Hanrahan Scholarship Fund (2021)

Janey Fund Scholarship Program (1999)

Manton Scholars (2017)

MFG Scholars Program (2019)

Nixon Peabody Scholarship Program in Recognition of Retired Managing Partners

Robert S. Cummings, Nestor M. Nicholas, and Harry P. Truheart, III (1998)

Stephen D. Paine Scholarship Fund (1999)

Francis P. Sears Scholarship Fund (1974)

Emily and Frank Smiddy Fund for Lexington Scholars (2020)

Waldron-Wayland Scholarship Fund (2019)

Paul & Eleanor Young Fund (1989)

Youth Business Institute Scholarship (2014)

Our Designated Funds

Designated Funds have been established to support specific, named organizations. Through these funds, many nonprofit institutions receive crucial annual support. The year each fund was established is in parentheses and new funds are bolded.

ACCESS Education Fund (1985)
Ad Club Foundation Fund (1988)
Fund for Adult Literacy (1985)
Rae and Aaron Alberts Foundation Fund (2003)
Rae and Aaron Alberts Foundation Fund II (2005)
Ames, IA Public Library Large Print Endowment Fund (2018)
Frank E. Anderson Fund (1976)
Artists Foundation Endowment Fund (1984)
Red Auerbach Youth Foundation Fund (1983)
The Helena and Alfred Barthel "Peace on Earth" Endowment (2017)
Lilian G. Bates Fund (1952)
Bedford, MA Public Library Large Print Endowment Fund (2018)
Grace & Floyd Lee Bell Fund (1988)
Lisa and Tom Blumenthal Artistic Innovation Fund (2018)
Boston Ballet-E. Virginia Williams Endowment Fund (1984)
Boston Bar Association Endowment Fund (1984)
Boston Baroque Fund (2004)
Boston Debate League Endowment Fund (2018)
Boston Medical Center Services Fund (2018)
Boston University School of Education Fund (2018)
Richard L. Bowser Fund (1985)
BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)
BPE/Support for Early Educational Development Fund (1986)
Prilla Smith Brackett Award (2018)
Herbert Brandshaft Scholarship Fund (2008)
Annie L. Breckenridge Trust Fund (2000)
Brookline Youth Concerts Fund (1995)
Michael and Stella Buonsanto Charitable Fund (2013)
William T. Burgin Scholarship Fund Harvard College Scholarship Fund (2022)
Charles T. Burke Fund for the Watertown Boys and Girls Club (1995)
Charles T. Burke Fund for the Watertown Free Public Library (1995)
Agnes T. Carruth Fund (1984)
James F. Casey Fund (1950)
Alex Castoldi Memorial Scholarship Fund (1982)
Dr. Walter Channing Memorial Fund (1934)
Charles River Parklands Stewardship Fund (2002)
Philip P. Chase Fund (1956)
Julia Child Fund (1980)
Ellen D. Cholerton Fund (1970)
Arthur G. Chute and Nordice Chute Family Legacy (2018)
The Cicolani Family Scholarship Fund (2018)
Ernest & Vera Clivio Charitable Memorial Fund (1982)
Committee to Light Commonwealth Avenue Fund (2012)
Concord, MA Public Library Large Print Endowment Fund (2018)
Almon B. Cook-Relief Fund (2001)
Allyn Cox Fund for Essex County Greenbelt (1994)
Thomas G. Curtin - Bobby Kargula Nanae Fund (2010)
Dedham Choral Society Endowment Fund (1992)
Harry Ellis Dickson Youth Concerts Fund (1982)
Joy & George Dryfoos Charitable Fund (2013)
Duggan Charity Fund (1999)
East Boston Social Centers, Inc. Fund (1997)
Douglas A. Eaton Memorial Fund (1963)
William V. Ellis Fund for Our Lady of Good Voyage Carillon (2012)
Ruby C. Emerson Fund (1967)
English High School Class of 1934 Award Fund (1995)
The English High School-John P. Murphy Scholarship Fund (1996)
Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2009)
Philip M. Fagan Family Fund (1972)
Paul R. & Jacqueline D. Fehrenbach Family Fund (2000)
Benjamin M. Feinberg Fund (1963)
Arthur Fiedler Esplanade Concerts Fund (1980)
Mark Hayden Fineman Chess Tournament Fund (1985)
Felix Fox Memorial Fund (1975)
Americo Francisco Fund, Estate & Realty/Charitable Trusts (1999)
Peter Marshall French Memorial Fund (1977)
The Linda Friedman Memorial Fund (2017)
Samuel Friedman Memorial Scholarship Fund for Roxbury Community College (2022)
Atul Gawande and Kathleen Hobson Fund for Ariadne Labs (2022)
Atul Gawande and Kathleen Hobson Fund for Lifebox Foundation (2022)
Gaywest Farm Fund (1994)
Agnes A. Gidley Memorial Fund (2014)
John & Ethel Goldberg Fund I (1984)
John & Ethel Goldberg Fund V (1985)
John & Ethel Goldberg Fund VI (1985)
Bessie P. Goldsmith Fund (1994)
Barbara W. & Frank B. Gopen Fund (1979)
Walter W. Gove Fund (1973)
Elizabeth Grant Fund (1981)
Rosario Fajardo Hagan Fund (1991)
Haiti Development Institute Fund (2016)
Patricia Jellinek Hollowell Fund (1993)
Hastings-Plummer Fund (1941)
Jorge N. Hernandez Fund (1988)
Gertrude Hooper Fund (1997)
Madeleine C. Huiginn Fund (1993)
Blanche Hyslop Fund (1983)
James W. & Margaret A. Ingraham Charitable Fund (1992)

DESIGNATED FUNDS

Inversant Fund (2018)
Ella Jackson Artists and Scholars Fund (1983)
Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2014)
Johnson Scholarship Fund (2020)
Donaldson F. Jones Fund (2000)
Patrick F. Jones, Jr. Endowment Fund (1982)
Beton M. Kaneb Fund I (2022)
William & Sean Kelley Scholarship Fund (2010)
John F. Kennedy Library Foundation Endowment Fund (1984)
Demetra Kenneth-Brown Fund (1921)
Alice V. Kidder Fund (2001)
Robert D. and Sally G. King Fund (2000)
La Vida (2018)
Gerald V. Levreault & Claire H. Levreault Fund (2002)
Lawrence B. Lewis Fund (1958)
Lexington Arts & Crafts Endowment Fund (2018)
Lexington, MA Public Library Large Print Endowment Fund (2018)
Lincoln, MA Public Library Large Print Endowment Fund (2018)
Lionheart Foundation Endowment Fund (2018)
Ralph Lowell Fund (1983)
Massachusetts Alliance for Early College Fund (2022)
Gertrude F. & Henry L. Maurer Fund (1999)
John S. McCann Fund (2000)
MHEAC Fund for ACCESS (1987)
The Mooney McIntyre Endowment (2022)
Dorothy Morse Endowment Fund (2000)
Harry D. Neary Fund (1951)
Neighborhood Preservation Initiative Fund (1995)
New England Aquarium Education Fund (1984)
New England Forestry Foundation Fund (1997)
New England Women's Club Fund (2002)
Roger L. Nichols Internship Program Fund (1985)
William H. Nichols Fund For Chemistry (2017)
Lottie S. Page Fund (1985)
Robert Treat Paine Historical Trust Fund (1991)
Palazzo San Gervasio Library Fund (1995)
William Morgan Palmer Fund (1978)
Harold Peabody Memorial Fund (1993)
Permanent Fund for Vocational Education (1979)
John M. Pero Scholarship Fund (2015)
Charles & Cornelia Pfaff Fund (1965)
Henry L. Pierce Fund (1959)
Emma K. & Richard Pigeon Fund (1956)
The Plimpton-Poorvu Design Prize Fund (2015)
Pozen Prize for Innovative Schools (2014)
Primary Care Fellowship Program Fund (1983)
Public School Management Research Fund (2003)
Pylone Chantha Orphanage Project (2020)
Quincy High School Class of 1973 Memorial Scholarship Fund (2021)
Charlotte F. & Irving W. Rabb Family Fund (1985)
Reading Visiting Nurse Association Fund (1977)

Rockport Music Fund (2018)
Rogers Fund of the Riverside Cemetery (1998)
Henry A. Root Fund (1927)
Rose Fund (1982)
Dr. Jordan S. Ruboy Charitable Fund (2014)
Salt Lick Incubator Fund (2022)
Sheep Pasture Fund (1994)
Bessie H. Short Fund (1997)
Dana P. & Maude E. Simpson Memorial Fund (1999)
Muriel & Otto Snowden Endowment Fund (1985)
Social Law Library Endowment Fund (1982)
Michael Spock Community Service Fund (1981)
Alison L. Stevens Fund (1977)
Eva and William Stillman Scholarship Fund (2014)
Miriam & Sidney Stoneman Fund (1984)
Surfmen's Trust Fund (1978)
Agnes & Lewis Taylor Fund (1963)
Frank B. Thayer Fund (1977)
Pauline Toumpouras Fund (2010)
Tsuda College Fund (2018)
David J. Tuttle, Jr. ALS Fund (2016)
David J. Tuttle, Jr. MIT Fund (2016)
Twelfth Baptist Church Fund (2022)
United Way Millennium Fund for Children and Families (2000)
Ansin Fund (2003)
Connell Family Fund (2001)
Carol R. & Avram J. Goldberg Fund (2002)
Lawrence & Beth Greenberg Fund (2001)
Darlene & Jerry Jordan Fund for Children (2000)
The Kraft Family Fund (2001)
Margarete McNeice Fund (2001)
David R. and Muriel K. Pokross Fund (2004)
Schoen Family Fund (2000)
Tom & Nancy Shepherd Fund (2001)
State Street Foundation Fund (2001)
J.C. Tempel Fund for Children (2001)
Vinik Family Fund (2001)
Peter and Pamela Voss Fund (2001)
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Inez Washabaugh Ward, PNP, Scholarship Fund (2011)
Bradford Washburn Fund (1980)
Bill and Estelle Watters Fund (1997)
Jane Wengren Fund (1980)
The George J. Westwater and Genevieve A. Westwater (nee Lennon) Fund (2021)
Stetson Whitcher Fund (1987)
Wiener Fund (2009)
May J. Wikstrom Fund (1999)
Michael N. Wood Legacy Fund (2021)
Rudolph & Sara Wyner Prize Fund (1986)

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Collaborate with us to increase the power of our grantmaking and create a more equitable Boston. No one funder can move the needle on our most pressing and intractable problems. We combine our philanthropy with deep public policy work that brings about systemic change. Your participation can strengthen our impact.

Give Through Us

Establish a Donor Advised Fund at the Boston Foundation. This is ideal if you want the benefits of opening or maintaining a private foundation with none of the administrative, legal, tax or regulatory burdens. You can maximize your philanthropy with access to our research, expert asset management, and unparalleled experience with donors and Greater Boston's nonprofit organizations. Your giving can be local, national or international in scope. And, if you're thinking about the future, we can work with you today to develop a legacy plan for tomorrow that will have the maximum benefit on future generations.

Give To Us

Our Annual Campaign for Civic Leadership enables us to drive real change by bringing people together to plan our city's agenda, always grounded in fresh research, working across sectors to advance a bold agenda for our region, and joining with policymakers to effect deep systems change. Let us help you transform your dedication to Greater Boston into real change.

Get Started

For more information about becoming a donor now or planning for your legacy, contact us at 617-338-2213 or donorservices@tbf.org.

TBF DONOR JOHN CONNORS
(CENTER) AT A **CHELSEA 2021** EVENT
(PAGE 22)

Photo by **Darlene DeVita**



EVERY DONOR ARRIVES AT **THE BOSTON FOUNDATION** WITH A **UNIQUE STORY, VISION AND GOAL**. THEY FIND A PLATFORM FOR THEIR CHARITABLE GIVING AT THE BOSTON FOUNDATION BECAUSE, LIKE YOU, WE MEASURE PHILANTHROPY BY IMPACT, NOT JUST DOLLARS GIVEN. OUR RICH DIVERSITY OF EXPERTISE OFFERS A HOST OF OPPORTUNITIES TO MEET YOUR UNIQUE NEEDS. WE INVITE YOU TO CONTACT US SO THAT WE CAN ASSIST IN DETERMINING THE BEST APPROACH FOR YOU.



NONPROFIT PARTNERS AT A
CHELSEA 2021 EVENT (PAGE 22)

Photo by **Darlene DeVita**



APPLYING FOR A GRANT



Funding Opportunities

The Boston Foundation's Programs Department is committed to having a profound and measurable impact on the Greater Boston community through our grantmaking. Our discretionary grantmaking, which is overseen by our Programs staff and approved by our Board of Directors, represents about 18 percent of the Foundation's overall giving. The remainder is directed by our donors through Donor Advised Funds. The allocation of more than \$15 million in discretionary grants each year is made possible by our endowment, the **Permanent Fund for Boston**, which has been built over the years through gifts and bequests from hundreds of generous community members.

Since 2009, we have invested the bulk of our discretionary grantmaking resources in partners and programs focused on five Impact Areas: Education; Health & Wellness; Jobs & Economic Development; Neighborhoods & Housing; and Arts & Culture.

In addition, discretionary grantmaking supports programs within our **Social Justice Ecology** framework. Through this work, our goal is to help inform and strengthen the conditions that allow social justice to thrive in Greater Boston by providing access to resources and support for people, movements and nonprofits working to disrupt persistent structural and institutional racism and encourage racial equity and justice.

We remain responsive to community and nonprofit needs beyond our strategic focus areas through our application-driven **Open Door Grants** program, which responds to expressed opportunities and needs in the communities we serve.

NOTE:

We are in the process of revising our grantmaking guidelines to reflect the goals of our strategic vision, *Our New Pathway*.

We will be communicating with our nonprofit partners with any updates—and all guidelines will be posted on our website at [TBF.org/nonprofits](https://www.tbf.org/nonprofits).

FESTIVAL BETANCES

Photo by **Angela Rowlings**



2022 FINANCIALS

Fund for the 21st Century

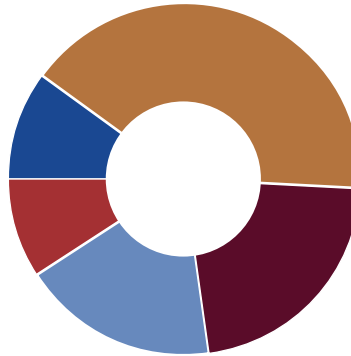
The Boston Foundation offers four separate investment pools within the Fund for the 21st Century. These four pools allow donors to select the option that best matches the time horizon of their charitable giving plans. Donors may also customize their asset allocation by investing among all four pools. The pools include the Balanced Plus Pool, the Balanced Pool, the Impact Pool and the Short Term Pool. The Balanced Plus Pool asset mix is expected to produce the highest long-term investment return. Accordingly, the Boston Foundation invests its endowment assets in the Balanced Plus Pool.

Financial Oversight

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

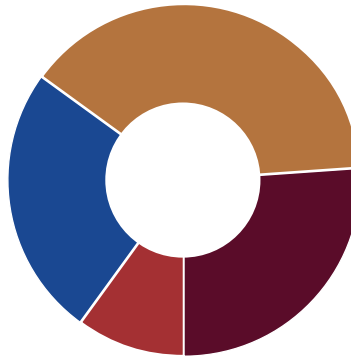
The Balanced Plus Pool assets include global stocks, investments with flexible capital managers, private equity, venture capital, real estate, and treasury securities. Diversification among multiple asset classes should help to reduce the volatility of the Foundation's investment returns.

Asset Allocation



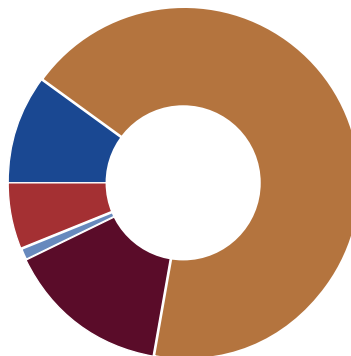
Balanced Plus Pool

- Global Equity **41%**
- Flexible Capital **18%**
- Private Equity **22%**
- Real Assets **9%**
- U.S. Treasuries **10%**



Balanced Pool

- Global Equity **39%**
- Flexible Capital **26%**
- Real Assets **10%**
- U.S. Treasuries **25%**



Impact Pool

- Global Equity **68%**
- Flexible Capital **15%**
- Private Equity **1%**
- Real Estate **6%**
- Fixed Income **10%**

The Boston Foundation has a mandate both to fulfill its role as Greater Boston's community foundation today—by maximizing the dollars available for making grants—and ensuring 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 these objectives.

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 2022 spending policy input rate was 5% for its permanently restricted discretionary funds. For Fiscal Year 2023, the Board approved to continue the spending policy input rate at 5% for its discretionary endowment. 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, adjusted for inflation, plus 30% of the spending policy input rate applied to the current market value. The approved spending policy input rate for designated endowment funds remained at 5% for Fiscal Year 2023.



PHOTO COURTESY TPI

The Philanthropic Initiative

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2022, the operations of TPI added \$3.3 million of service fee income to the operations of the Foundation.

Investment Performance

(June 30, 2022)

	1 YEAR	3 YEARS	5 YEARS	10 YEARS	15 YEARS	20 YEARS
FUND FOR 21ST CENTURY INVESTMENT OPTIONS:						
Balanced Plus Pool	-3.9%	9.2%	8.3%	8.0%	5.5%	7.3%
Balanced Pool (established 2/1/11)	-8.6%	4.1%	4.9%	5.8%	n/a	n/a
Impact Pool (established 6/1/20)	-14.9%	n/a	n/a	n/a	n/a	n/a
Short-Term Pool (established 1/1/10)	0.1%	0.6%	1.1%	0.6%	n/a	n/a
BENCHMARKS:						
FTSE World Bond Index	-16.8%	-4.3%	-1.2%	-0.7%	1.9%	3.0%
65% MSCI A.C. World/35% FTSE World Bond Index	-16.0%	2.7%	4.4%	5.6%	4.1%	6.0%
MSCI All Country World Stock Index	-15.8%	6.2%	7.0%	8.8%	4.8%	7.2%
S & P 500 Stock Index	-10.6%	10.6%	11.3%	13.0%	8.5%	9.1%

Financial Analysis

Total assets of the Boston Foundation were \$1.7 billion at June 30, 2022. For the year, net investment returns for the Balanced Plus Pool were -3.9%. Total investment returns were -\$93 million. During this same period, the Foundation received \$330 million in contributions and paid \$197 million in grants. Other expenses totaled \$30 million, thus explaining the change in total assets.

Financial Statements

The Foundation's financial statements are prepared in accordance with policies and procedures overseen by the Foundation's independent Audit Committee and the Board of Directors. A summary of the financial statements is shown at right. The statements and Form 990 are available on our website at www.tbf.org.

2022 and 2021 Summary Financial Statements

(in thousands)

ASSETS:	2022	2021
Investments	\$ 1,653,291	\$ 1,645,019
Cash & Equivalents	12,250	12,561
U.S. Treasury Notes	27,636	25,598
Receivables & Other	26,074	26,506
Total Assets	\$ 1,719,251	\$ 1,709,684
LIABILITIES & NET ASSETS:		
Accounts Payable & Other Liabilities	\$ 7,452	\$ 8,135
Grants Payable	5,076	5,056
Net Assets	1,706,723	1,696,493
Total Liabilities & Net Assets	\$ 1,719,251	\$ 1,709,684
REVENUES:		
Contributions	\$ 329,551	\$ 308,694
Service Fee Income	2,515	2,240
Net Investment Return	(93,006)	370,563
Total Revenues	239,060	681,497
GRANTS & EXPENSES:		
Grants	\$ 198,225	\$ 174,222
Change in Split Interest Trusts	96	(363)
Operating Expenses	30,510	24,492
Total Grants & Expenses	228,830	198,351
Change in Net Assets	10,230	483,146
Net Assets Beginning of Year	1,696,493	1,213,347
Net Assets End of Year	\$ 1,706,723	\$ 1,696,493

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

BOARD OF DIRECTORS

The Boston Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community's interests and needs.

All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.

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*We dedicate this annual report to the memory of Thomas Ruffen,
a Boston Neighborhood Fellow who tragically was killed on September 1, 2022.*

*We remember him for his leadership, his vision,
his courage and, most of all, his kindness.*

*We invite you to visit tbf.org/spotlight for a series of brief, moving videos about
the 2021-2023 Boston Neighborhood Fellows, including Thomas Ruffen.*

PHOTO COURTESY GREATER BOSTON INTERFAITH ORGANIZATION

ACKNOWLEDGMENTS

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