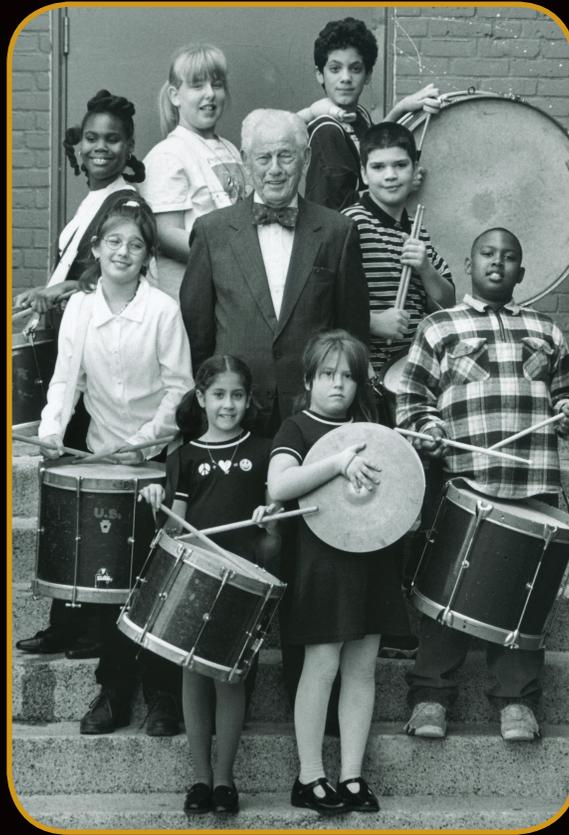


Changing Lives



In 1930, he made his first charitable contribution, writing a check for \$10, which was one-third of his weekly salary...

The legacy of giving that David Pokross began as a young man continues to change lives in our city well after his death. What will your legacy be? (See page 39 for his story.)



Changing Lives



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Letter *from the* Chair

As Chair of the Board of Directors of the Boston Foundation, I am privileged to have a special lens through which I can view its work and accomplishments. Every year, I am deeply impressed, and this year was no exception. You will learn about the progress the Foundation made toward meeting every one of its goals reflected in these pages. None of this would be possible without the support of two important groups to which we owe a debt of gratitude.

First, thank you to our donors, both for making grants through your Donor Advised Funds and for contributing to other funds at the Foundation. Many of you gave to the Civic Leadership Fund, which raised \$1.4 million this year, and which supports much of the Foundation's work in critical areas, such as advancing education and health care reform. I thank everyone who helped to build that important fund.

This annual report pays tribute to a very special group of donors who have made planned and legacy gifts over the years to the Permanent Fund for Boston. This is the fund that gives the Foundation the resources it needs for all of its grantmaking in Greater Boston and a great deal of its other work strengthening our community. Over the years, hundreds of people have helped to build that fund and many others have indicated that they will leave bequests to it as part of their estate planning. As we advance toward the Foundation's 100th Anniversary in 2015, we are making a special commitment to building this fund so that it can be even stronger in the future.

I also want to thank the staff of the Boston Foundation, which includes some of the most talented and dedicated people working in the philanthropic and nonprofit realm in our city. In hundreds of large and small ways, and under the expert direction of Paul Grogan, they improve our community immeasurably.

Finally, I want to express my appreciation to my fellow Directors, who make enormous contributions to all of the Foundation's work. This year, we suffered a terrible loss—one that we share with many others. With the passing of Myra Kraft, the Boston Foundation lost a dedicated Director and a cherished friend—and our community lost a champion for the most vulnerable people among us.

We take great solace, however, in knowing that Myra's compassion and work will live on through the many organizations she served and inspired, including the Boston Foundation. Myra was the impetus behind a partnership the Boston Foundation helped to launch, called the Boston Opportunity Agenda, which this year released its first report card on the progress it is making to prepare all Bostonians to thrive. That effort stands as a tribute to Myra's leadership and optimism.

In that spirit, I invite you to join us as we move into the next year and continue to strive to fulfill our mission to ensure that all of our residents are successful and thriving, and all of our communities are vibrant, safe and affordable. Let's do that as a way of honoring the memory of Myra Kraft and with much hope for our future.

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

Report *of the* President

A young immigrant from Cape Verde attending a local community college receives coaching and support through a major college completion initiative. A mother of four pursues her dream of becoming a nurse through a program that helps adults prepare for jobs in the health care field. A young man from the streets of Roxbury is connected with trusted adult mentors and placed in a life-altering job.

These are just a few of the lives that have been changed by programs supported through the Permanent Fund for Boston at the Boston Foundation.

Among all of the generous donors who conduct their giving through the Boston Foundation—and contribute to funds held by the Foundation—there is a unique group of people who decide they want to have a profound impact on Greater Boston’s future and who choose to do that by including the Permanent Fund for Boston in their estate plans.

Over the years, it is this fund that has given the Foundation the resources to invest in bold new ideas: ideas like establishing the first public television station in the country; or starting a brand new youth service corps that would go on to serve as a national model; or the audacious idea that Boston’s Harbor could go from being one of the filthiest to one of the cleanest urban harbors in the country.

It is this same fund that gives the Foundation the resources to join in partnership with other funders and with government to create ambitious new initiatives aimed at solving Greater Boston’s most serious challenges—and to make grants to innovative nonprofit organizations with proven track records of success. And it is this fund that will be there in the future, so that tomorrow’s Boston Foundation can respond nimbly to the challenges and new ideas of the day.

In this year’s annual report, we tell the stories of just a few of the donors who have left bequests to the Permanent Fund for Boston—or have inspired others to create funds in their name. One story is about the very first donor who left a major bequest that allowed the new foundation to start making grants in the early part of the 20th century. Another is about a world-renowned social worker who left a fund with just one restriction—that it be used for “community building.”

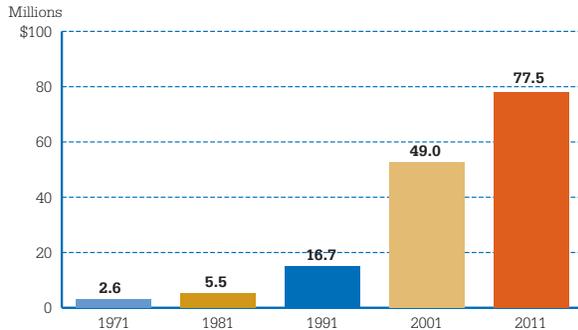
We join their stories with those of people whose lives have been changed because of their generosity and commitment to Greater Boston.

As the Boston Foundation approaches its 100th Anniversary, in 2015, we are making a commitment to continue to build this important fund—this community endowment—so that future residents of Greater Boston can pursue their dreams too. We invite you to join us.

Paul S. Grogan
President and CEO

2011 *at the* Boston Foundation

In 2011, the Foundation receives more than \$81 million in gifts and makes almost \$78 million in grants—and the Civic Leadership Fund surpasses its goal of \$1.4 million. Here are just a few brief highlights of a remarkable year.



Total Grants Since 1915 Top

\$1 Billion Grants of almost \$78 million are made by the Boston Foundation and its donors during 2011—some \$29 million more than just a decade ago

\$2.3 million is raised to **help residents through the winter** as the result of a partnership among 11 charities and foundations

The diverse **Put Students First Coalition** is convened to work for change in Boston's schools by calling for significant changes in **a new teachers' contract**



My Summer in the City completes its second year with \$250,000 in funding to **keep parks and playgrounds open** after hours with organized activities



A popular series of forums on race and racism in Boston, called **Boston Talks Race**, is launched in collaboration with Commonwealth Compact, the Museum of Science Boston and the Urban League of Eastern Massachusetts

38 Boston area colleges and universities join the **Success Boston College Completion Initiative**,

which graduates its first students

The nation's leading philanthropic newspaper,

The Chronicle of Philanthropy,

features the Boston Foundation's efforts as a civic leader

The Boston Opportunity Agenda

releases its **First Annual Report Card**

on progress made toward its goals along the entire

education pipeline

The Healthy People/Healthy Economy Coalition

releases its first report

card, grading 14 different health indicators and showing

much room for improvement

The Foundation plays a key role in the passage of

groundbreaking municipal health care reform legislation,

with \$100 million

in potential savings for cities and towns

The Foundation realizes the value of the **largest gift in its history: \$31.6 million**

from the sale of its share of a donated cruise ship



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.



Richard M. Burnes Jr.
General Partner
Charles River Ventures, Inc.



Gerald Chertavian
Founder and CEO
Year Up



Catherine D'Amato
President and CEO
Greater Boston Food Bank, Inc.



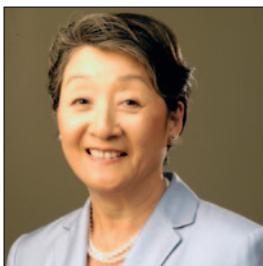
Sandra M. Edgerley
Trustee
Edgerley Family Foundation



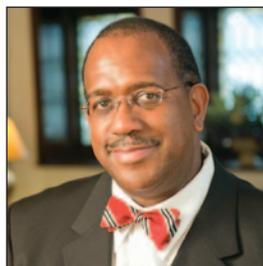
Michael R. Eisenson
Managing Director and CEO
Charlesbank Capital Partners,
LLC



Grace Fey
President
Grace Fey Advisors



Atsuko T. Fish
Consultant
U.S.-Japan Cross Cultural
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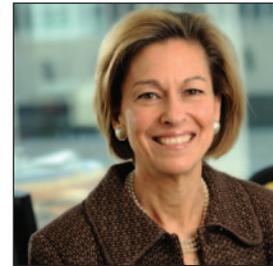
Kevin C. Phelan
President
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Greg Shell
Research Analyst,
International Active Division
 GMO



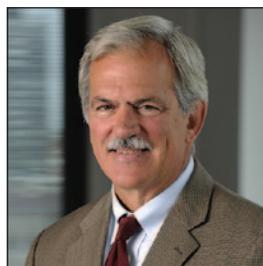
Binkley C. Shorts
Former Senior V.P., Partner and
Equity Portfolio Manager
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 Company, LLP



Micho F. Spring
Chair
 U.S. Corporate Practice,
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President and CEO
 The Boston Foundation
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Patricia Maguire, *Program Officer, SkillWorks*
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Caroline Hostetter, *Impact Associate, StreetSafe Boston*
Franklin Shearer, *Program Associate*
Nahir Torres, *Program Associate*
Kathy Traylor, *Administrative Coordinator, StreetSafe Boston*
Natanja Craig, *Special Assistant*
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Marcus Johnson-Smith, *Program Assistant*
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Jenna Smith Gomes, *Director of Development*
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Jackie Birr, *Administrative Assistant*

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Orlando Watkins, *Senior Director, Philanthropic Partnerships*
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Jill Passano, *Philanthropic Partnerships Officer*
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Katherine Westlund, *Donor Services Associate*
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Elizabeth Doolittle, *Program Assistant*
Kristin David, *Philanthropic & Donor Services Assistant*

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George Wilson, *Chief Investment Officer*
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Jessie Zuberek, *Fund Administration Officer*
Stephen Forest, *Accounting Manager*
Stacey Riddick, *Financial Operations Manager*
Megan O'Toole, *Fund Administration Coordinator*

Administrative Services

Beth Llewellyn, *Chief Administrative Officer*
Michaela June, *Director of Information Technology*
Glen Davis, *Human Resources Manager*
Lauren Baker, *Office Manager*
Anna Gallo, *Receptionist*

Our 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:

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

Our Value Statement

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

Our Strategic Focus on People and Place

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

{ Greater Boston residents are successful and thriving. }

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

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

Our Governance and Staff

The Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community's interests and needs, and some 70 staff members who work closely with donors, grantees, civic leaders and community residents to have a positive impact on Greater Boston and our region. The staff includes professionals in the areas of grantmaking, philanthropy, finance, administration and communications and public affairs.

(See page 6 for a list of all board members and page 8 for a staff list.)

Understanding the Boston Foundation

Major Funder of Nonprofit Organizations
Partner in Enhancing Donor Impact
Civic Leader and Convener

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

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

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

The Boston Foundation offers large, multi-year General Operating Support Grants to nonprofit organizations whose missions are closely aligned with the Foundation's goals and objectives. We also offer Project Support Grants for specific programs that reflect our goals, Special Opportunity Grants for new ideas that tackle long-standing or emerging community challenges, and other types of grants and support. The Foundation works closely with the nonprofit organizations that receive grants and all of the communities we serve (see *Applying for a Grant* on page 51 for more).



Enhancing Donor Impact / Customizing **Charitable Solutions, One Donor at a Time**

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

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

for the causes they care about.

The Foundation also offers funds that allow donors to invest in the future of Greater Boston and the issues and organizations that have a profound impact on their lives—through gifts or bequests to the Permanent Fund

for Boston, Boston's primary endowment fund, or Field of Interest Funds that benefit a particular issue. In addition, the Foundation has a number of Designated Funds that provide annual support to many of our city's most important nonprofit organizations. (See *Becoming a Donor* on page 52 for more.)

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



Over the last decade, the Boston Foundation has become a major civic leader for Greater Boston and our region—with crucial support from the Civic Leadership Fund at the Boston Foundation, which raised more than \$1.4 million this year. We conduct this work through a formula that includes:

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

Through our Understanding Boston series, we identify challenges facing our city and region, commission fresh research and share information through a series of forums that are attended by thousands of people every year. The Foundation also is known for using strategic, proactive grantmaking to strengthen its civic leadership work and forming powerful task forces and coalitions of experts dedicated to fulfilling ambitious agendas for change. Through all of these strategies, including working closely with the media to encourage in-depth coverage of key issues, we engage in deep public policy work in partnership with other civic leaders and policy makers. Over the years, our civic leadership has had a profound impact on public education, smart growth housing, fiscal issues for municipalities, health and wellness—and other areas of critical importance to the people of our city and region.

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

More than \$26 Million in Funds Leveraged in 2011

As Greater Boston's community foundation, the Boston Foundation is in a unique position—at the center of this region's philanthropic and nonprofit sectors—which enables it to leverage millions of dollars in outside resources for the benefit of the city and region. In 2011:

Close to \$5 million was received by the Foundation for special initiatives, such as those in the areas of college success, youth mentoring and gang violence prevention, and workforce development.

More than \$1 million was raised for international disaster relief funds through the Haiti Fund and the Japanese Disaster Relief Fund, which are housed at the Boston Foundation.

More than \$1.4 million was raised for SkillWorks from private and public sources to address critical issues of the region's workforce development system toward the overall goal of \$10 million over five years.

Some \$6.7 million was generated by collaboratives housed at the Foundation, including \$4 million for the Boston Opportunity Agenda; \$1,105,000 for English for New Bostonians; \$450,500 for the Boston Schoolyard Initiative; \$979,000 for the Achieving the Dream higher education funder collaborative; and \$180,000 for Social Venture Partners-Boston.

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

More than \$10.3 million in Donor Advised Fund grants were directed to organizations supported by Discretionary Funds during 2011.

More than \$2 million was raised for the StreetSafe Boston initiative to address the troubling youth gang violence issues in our city.

Program Related Investments Have Leveraged \$500 Million

In 2002, the Boston Foundation's Board set aside \$10 million from the principal of the Permanent Fund for Boston for Program Related Investments (PRIs). Investments to date include \$6.5 million in PRI loans for producing housing for the homeless and stabilizing foreclosed properties in distressed neighborhoods, and \$5.5 million in loan guarantees for charter school construction and affordable housing project operating reserves. These investments, made in partnership with other funders, have helped finance more than 3,200 units of housing and 20 charter schools and leveraged some \$500 million in additional financing.



Changing Lives

The Power of the Permanent Fund for Boston



The Boston Foundation was founded in 1915 with a simple, but profound mission—to receive gifts from generous donors and use those resources to make grants to the nonprofit organizations that serve the Greater Boston community.

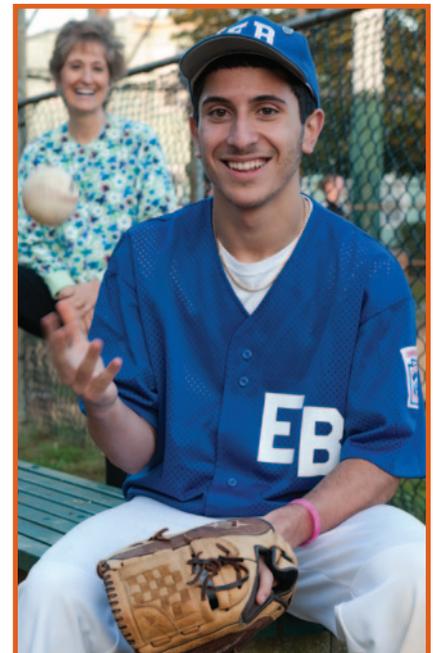
Most community foundations in America received relatively minor contributions in their early days and it took years for them to have the capacity to make any grants. In 1916, however, a civic-minded Bostonian named James Longley left a bequest of \$4 million to the Boston Foundation. It was, and would remain for many years, by far the largest gift given to any community foundation in the country—**and it made the Boston Foundation the first to have the capacity to make substantial grants to benefit the community.**

What was especially powerful about Mr. Longley's particular bequest was that it was left to the Foundation's Permanent Fund for Boston—**and it placed no restrictions on the way his gift would be spent.** It allowed the Foundation to respond immediately to Boston's greatest needs, which at the time included the settlement houses that were serving European immigrants and the hospitals and agencies responding to those affected by World War I.

It is impossible to calculate the value of Mr. Longley's bequest today—especially the number of lives he has touched through his generosity. Hundreds of other donors have followed in his footsteps.

This year's annual report pays tribute to just a few of those donors and tells stories of some of the lives that have been changed as a result of their gifts. **It draws a human connection between the people of the past who entrusted their contributions to the Boston Foundation and those who are benefiting from their generosity today.**

Back in 1915, James Longley was an influential businessman who had a high regard for the people living in his community and wanted them to thrive in the years to come. Today, almost 100 years later, he is living on through his contribution to the Permanent Fund for Boston—and, as a result, he and other donors like him are literally changing lives.



“We Can Do This Together”

“It changed my life.” This is what Elisio Depina says about Success Boston, a college completion initiative that helps Boston Public Schools students get ready, get in and get through college. With a case management approach, the initiative provides students with one-on-one coaching, help with applications and financial aid and any other assistance they might need.

“The first thing Elisio needed was a new green card,” says Elisio’s Success Boston coach Danny Rivera, who works with students at Bunker Hill Community College. “He had lost his card and they were telling him it would take months to get a new one. So I got right on it and he had the card in time to start his first day of college.”



“Danny told me ‘we can do this together,’” says Elisio, “and we did. The next thing he did was help me apply for financial aid. I couldn’t sleep at night because I was so worried about money. If it weren’t for Danny and Success Boston, I wouldn’t be where I am right now.”

Elisio, who is now a U.S. citizen, came to Boston from Cape Verde when he was 16, just seven years ago, with his father, two brothers and a sister. He worked such long hours at a McDonald’s to make ends meet that he fell behind in his homework, fell asleep in classes, and eventually dropped out of high school.

“I could have gone on working for McDonald’s,” he says, “but I kept on thinking that I wanted more out of life. I kept asking myself who I wanted to be. So I went back to Madison Park High School and passed all of my courses and graduated. I knew I wanted to go to college, but I’ve always had financial problems and I didn’t know how to start. Then I got a call from Danny, who said ‘I’m here to help you,’” and that’s when my life began to change.”

Today, Elisio, who Danny says is like “a force of nature,” mentors other Bunker Hill students and is attending his first year at New Haven University where he is studying Investigative Services. He and Danny made sure that his credits from Bunker Hill would count toward a Bachelor’s degree at a four-year college, so he expects to graduate in two years. His face lights up when he mentions Edna, his fiancé, who is also from Cape Verde and attends Bridgewater State University.

“She inspires and motivates me,” he says. “We both believe that if you want to do something, you have to understand what it takes and you have to do that no matter what. That’s the only way to succeed in life.”



Danny Rivera with Elisio Depina



James Longley

Born in Boston's West End in 1840, James Longley became a director of major financial institutions in Boston and Chicago and the owner of some of the largest textile mills in New England.

As someone who cared deeply about the city in which he was born and was active in numerous charities, he approved of the new Boston Foundation, which had been launched in 1915 to help those who most needed assistance in our community. At the time, that included European immigrants flooding into the city, as well as families suffering from the effects of World War I.

Known for his concern for others and his many contributions to charities, when he died, in 1916, he left the first large bequest to the Permanent Fund for Boston at the Boston Foundation. His gift was unrestricted, giving the Boston Foundation the resources to be the first community foundation in the country to make grants.

Today, almost 100 years later, he is helping Elisio Depina fulfill his dream of a college education.

Success Boston

Elisio Depina is among the first graduates of the *Success Boston College Completion Initiative*, which was launched in 2008 following the findings of a study conducted by Northeastern University's Center for Labor Market Studies for the Boston Private Industry Council and the Boston Foundation. The study found that while the Boston Public Schools has one of the highest college enrollment rates of any urban school system in the country, at close to 78 percent, only 35.5 percent of the students who enrolled in college earned an Associate's or Bachelor's degree within seven years.

In response, Mayor Thomas M. Menino challenged the city to double the college completion rate for the BPS Class of 2011 and beyond—and was joined by the Boston Public Schools, the Boston Foundation, the Boston Private Industry Council and University of Massachusetts Boston for the launch of Success Boston in November of 2008. The Boston Foundation committed \$1 million in funding every year for five years to the initiative.

The goal is to dramatically increase the number of Boston Public Schools graduates completing college by focusing on helping students get ready, get in and get through college. The initiative supports academic programming and college advising activities at the high school level, offers a summer bridge program for students transitioning from high school to college, and works closely with colleges and universities to offer students the support they need to earn a degree and be prepared to enter the workforce.

In May of this year, 38 Boston area colleges and universities endorsed Success Boston.

Elisio Depina



BUNKER

PEARSON CRIMINAL JUSTICE

“Planting a Garden Together”

The inspiration behind the Family Independence Initiative (FII), a national project that came to Boston just two years ago, is this country’s long history of low-income people forging a path to the middle class by turning to informal networks of family and friends. They have pooled resources, asked advice of each other and followed the example of those in their circle who found success. FII has taken this model and helped to catalyze networks of families and friends throughout Greater Boston who are working together to set goals and take control of their lives.

The concept is brilliant in its simplicity—and you can see it in action in a remarkable group of young women, all immigrants from Colombia, who are part of a larger group of seven women who have been meeting for the last year and a half, under the unobtrusive but attentive eye of FII’s Family Liaison Wandy Peguero. On a beautiful September evening in East Boston, the women got together in a room in that neighborhood’s Social Center for one of their networking meetings. They always bring food to their sessions, for sustenance, and arrange for child care so that they can focus entirely on their conversations.

“The first time we met, we didn’t know what to discuss,” said Beatriz Alvarez, who has emerged as a kind of natural leader of the group and takes notes during meetings on a laptop provided by FII. “Wandy wanted us to decide for ourselves what issues we would discuss. One of the women had a credit card problem and so that became our first issue.” The women decided that they wanted to consult an expert on credit cards, so, at their request Wandy helped them find someone to give them a workshop on credit. “It was helpful for all of us,” added Beatriz.

They have not had to worry about finding topics for their meetings ever since. Several of the women in the group want to go to college and are helping each other apply and seek financial aid. Others are interested in starting businesses and nonprofit groups and have been working with the Center for Women and Enterprise to develop business plans.

They contribute to a joint savings account that is used for gifts for children and for events to which all FII participants are invited. As they learn about the resources that are available to them, they are even helping other families, asking

businesses to donate school supplies for children who can’t afford them. And a while back they consulted an expert about how to plant a garden so that they could grow fruits and vegetables for their families. The idea of a garden, planted by these wise and resourceful women, is a perfect metaphor for their work together. And their garden is most definitely growing.



Luz Elena Munoz, Beatriz Tabares and FII staff person Wandy Peguero during a meeting.



Harriett Bartlett

Considered one of the great American pioneers in the field of social work, Harriett Bartlett was born in 1897, the year before the first social work class was offered at Columbia University. Since then social workers have led the way in developing many of the systems and programs that serve people in need.

Harriett received her Bachelor's degree from Vassar in 1918 and went on to study at the London School of Economics and the University of Chicago. Her deep connection with Greater Boston took root in 1921 when she began serving as a caseworker for Massachusetts General Hospital. Later, she would teach classes in 'social economy' at Simmons College. And in 1969, Boston University awarded her an honorary doctorate for her contributions to the field of social work.

When she died in 1987 at the age of 90, she left a major bequest to the Boston Foundation. Her gift was virtually unrestricted, except that she wanted it to be used for "community building." Grants from her fund are doing exactly that.

Today she
is helping
newcomers
to our city,
like these
resourceful
women, build
community.

Family Independence Initiative

With an operating grant of \$450,000 over three years, the Boston Foundation has made a major investment in the initiative that brought the women in this story together.

The Family Independence Initiative (FII) was launched in Oakland, California by Maurice Lim Miller, who was challenged by Jerry Brown, then Mayor of Oakland, to create something new to empower low-income families to pull themselves out of poverty. After thinking about his own family and researching the histories of immigrant, migrant and indigenous communities in the U.S. who managed to move from poverty to the middle class, Maurice found a common narrative—people had turned to family and friends, pooled resources and followed the example of those who had begun to succeed.

FII was created with this model in mind and was replicated in San Francisco and Oahu, Hawaii. Within two years, FII families in those cities had increased their income and their savings by 240 percent and accumulated new assets by becoming homeowners and expanding their businesses.

In the spring of 2010, FII came to Boston and identified 35 families in East Boston, Dorchester and Roxbury to work with—focusing on those who appeared to have the potential and the initiative to change their lives. Already these families have embraced the model and are beginning to show the kind of progress that has taken place in other cities.

From left: Beatriz Alvarez, Lucy Cadavid,
Beatriz Tabares and Luz Elena Muñoz.
Other members of the group include Vilma
Garza, Maria V. Gavidia and Lidieth Ospina.



“Singing as a Catalyst for Social Change”

“Our mission is to use singing as a catalyst for social change—for cultural change,” says 15-year-old Kevin Chan, “and to transform the community’s negative influences into positive ones.” Carlos Pedrero, age 14, agrees. “I know there are a lot of people who definitely want social change, but they either won’t or can’t speak up. I think when they see us—when they see how great we get along, even though we’re very different—it helps to unite people.”

These thoughtful and articulate young men are both members of the Boston Children’s Chorus (called “BCC” by them), which is deeply committed to providing the youth of Greater Boston with the opportunity to experience the transformative power of music. The Chorus has 11 different

choirs and Kevin and Carlos are in the Young Men’s Ensemble, which is a special program to meet the unique needs of boys ages 10 to 18 with changing and changed voices. Far beyond their voices, the Chorus clearly is having a profound impact on these young men’s lives.

“BCC has really changed me,” says Carlos, who moved here from Mexico with his mother when he was eight years old. “When I first came here, it felt very different; it was a different culture. But at BCC you just share everything. You share ideas and you laugh a lot—and you’re working very hard together too. With music, you don’t have to understand the words—you feel the feelings.” Carlos begins his first year at Boston Arts Academy this year, a high school for which he had to audition. “Singing helps us feel more confident too,” he adds.

Kevin was born in Allston to Chinese immigrants. He had seen the Boston Children’s Chorus on television on July 4th and auditioned through the West End Boys and Girls Club in his neighborhood. “Ever since I joined, I realize that it’s not just about singing,” he says. “It’s about the wider definition of art and how it affects people. It’s been very important for me that the chorus stands for unity, and that it is helping people find common ground.”

The Boston Children’s Chorus was created by Hubie Jones, one of the greatest social activists and civic leaders in our city’s history. Not a musician by training, his vision for the choir was to build bridges between the people of Boston through music. Meeting Carlos and Kevin leaves no doubt that his dream has been realized—and that these young men will carry the values they are learning through the chorus with them all of their lives.



The Young Men's Ensemble rehearsing



Anna Faith Jones

Anna Faith Jones grew up in the 1930s and '40s on the campus of Howard University, where her father, Mordecai Johnson, was President. In 1939, as a little girl, Anna was there when the world-famous contralto Marian Anderson, barred from Constitution Hall, sang before thousands at the Lincoln Memorial. That may have been when she first understood the transformative power of art.

Anna came to Boston to attend Wellesley College and studied music. After college, she tried various professions, but when she began working part time at the Boston Foundation, in 1975, she found her calling. Ten years later, she became the first African-American woman to lead a community foundation. She retired after 16 years, having transformed the Foundation into the region's dominant grantmaker.

Upon her retirement in 2001, the people of Boston honored her by creating the Anna Faith Jones Arts Fund. Since then the fund has supported many arts groups, including the Boston Children's Chorus.

Today she is helping Carlos Pedrero and Kevin Chan inspire social change through their music.

Boston Children's Chorus

In 2001, longtime Boston activist and distinguished community leader, Hubie Jones, witnessed a moving and inspiring performance by the Chicago Children's Choir, and decided that Boston—the city he loves most—deserved to have its own ambassadors of harmony. The Boston Foundation was there at the beginning, providing \$30,000 in start-up funding to fulfill his vision. This year, the Foundation made a \$300,000 operating grant to the organization that will help to support its work over the next three years.

Beginning in 2003 with only 20 singers, today the Boston Children's Chorus serves more than 450 singers from diverse racial, religious, ethnic and economic backgrounds, representing some 80 urban and suburban neighborhoods in Greater Boston. Youth participate after school in 11 different choirs.

Under Artistic Director Anthony Trecek-King, the Boston Children's Chorus harnesses the power of music to unite our city's diverse communities and inspire social change. Through intensive choral training, a unique music education curriculum, and unsurpassed performing experiences locally, nationally and around the world, chorus members, ages 7 to 18 learn discipline, develop leadership skills and proudly represent Boston.

This past summer, Kevin Chan and Carlos Pedrero were among 61 members to travel to the United Kingdom, the Chorus' fourth international tour. The singers presented performances in Scotland and England, including a concert in aid of the international children's charity Save the Children. It is possible that the Boston Children's Chorus has surpassed even Hubie Jones' wildest dreams.

Kevin Chan and Carlos Pedrero



“Embracing My Future and Moving Forward”

One day, Ingrid Trench had a doctor’s appointment at The Dimock Center, which provides families in Boston’s inner-city neighborhoods with health care and much more. In fact, the Dimock is considered to be a national model for delivering comprehensive health and human services in an urban community.

During her appointment, Ingrid mentioned to her doctor that she recently had lost her job in retail. “Like so many Americans, I found myself out of a job for the first time in my life and I realized that I needed help,” she says. “I needed to tap into community resources to get my kids and myself through this.”

Unexpectedly, her doctor turned out to be an immediate link to those community resources. “My doctor said, ‘We have some students here who can help with that. Let me connect you with them!’” The “students” Ingrid’s doctor was referring her to were with Health Leads, which was founded in Boston by Rebecca Onie and Dr. Barry Zuckerman, the legendary head of pediatrics at Boston Medical Center. As a pre-law sophomore at Harvard, Rebecca had been volunteering in pediatrics and saw a direct link between ‘health’ and many of the other problems families had.

Now a national organization, Health Leads is part of a larger movement that is offering a new vision for health care in America. Its programming focuses on promoting health by connecting people to the resources they need to survive and even thrive. Through Health Leads, doctors can “prescribe” food, housing or other critical resources, just as they would medication. Patients take their prescriptions to the organization’s college volunteers, who connect them to those resources.

“The first student I worked with was named Shira,” says Ingrid, “and she helped me with a little bit of everything—connections to nutritious food, child care, summer camps for my kids. She filled that gap between me and the resources my family needed. I’m a proactive person, so between the two of us, there was never a down moment. She was patient and wonderful, and called every Friday to see if I needed anything! It was a difficult period in my life and Health Leads made it a lot easier for me.”

Ingrid was so impressed with Health Leads that she is inspired to switch careers to the human services. “To keep myself busy, I started mentoring kids through Goodwill’s ‘Good Guides’ program and I took a human services class,” she explains. “I found I really loved it. Now, my goal is to get a degree from UMass Boston and prepare to serve my community.” Today, Ingrid still uses Health Leads’ referral services, but she is taking charge of her own life. “I’m embracing my future and moving forward,” she says.



(From left): Health Leads student volunteer from Boston University Roshni Sing, Dimock Health Center program manager Nicole St. Omer Roy and Natalie Browne-Holmes, also a BU student volunteer.



Anna C. Frothingham

Born in Pittsfield, Massachusetts in 1849, as Anna Clapp, Anna C. Frothingham married Reverend Paul Revere Frothingham in 1892. They resided in New Bedford until 1900, when her husband was invited to serve as the pastor of the historic Arlington Street Church in Boston. While her husband was busy with his new role, which included assisting the poor of Boston, Anna was active in a number of organizations that were launched and run by women.

She was a member of the Women's Municipal League, a group of wealthy women who prided themselves on inviting women of all incomes to join them as equal members. She also volunteered for the Women's Educational and Industrial Union, which had been founded in 1877 to respond to the exploitation and miserable labor conditions experienced by many of Boston's women. When Anna died, in 1939 at the age of 90, she left a major bequest to the Permanent Fund for Boston.

Today she is helping Ingrid Trench build a healthy life for herself and her children.

Health Leads

Health Leads is the organization that is helping Ingrid Trench tap into community resources to keep her family vibrant and healthy during a difficult time. The Boston Foundation has been a major supporter of Health Leads for years, providing more than \$600,000 to the organization since 2005. Through its strategic grantmaking and through the Healthy People/Health Economy Coalition, the Foundation is focusing on reducing preventable chronic disease by emphasizing access to healthy food, increased physical activity and other factors that promote health and wellness.

Health Leads was launched at Boston Medical Center's Pediatric Clinic and has expanded to four other Boston clinics, including The Dimock Center and Codman Square Health Center, and five other cities. Through its approach, doctors can prescribe community resources—just as they would medication.

Patients take their prescriptions to the clinic waiting room, where college volunteers are ready to connect them to these resources. Playing this role has been a transformative experience for hundreds of volunteers from Boston area colleges, who stay with clients until their needs are met. With more than 800 volunteers nationally and 150 in Boston, Health Leads is producing a pipeline of new leaders in health who will have both the conviction and the ability to revolutionize health care.

Health Leads' ultimate goal is that one day, all doctors will be able to prescribe solutions that improve health, not just manage disease—and that the diagnosis and treatment of non-medical, but health-critical conditions will be a standard part of patient care.

Ingrid Trench and daughter Janay,
one of her three children



“Lessons You Can Use in All Parts of Your Life”

It is hard to think of a sport at which 15-year-old Alex Maghsoudi does not excel. During the summer, he has played baseball with the Senior Division of the East Boston Baseball Little League, which last year advanced all the way to the state championships. The high school he attends, St. Mary’s in Lynn, wants him to play tennis for the school and has him in training for cross-country track competition, which Alex thinks of as a good way to stay in shape for all of the other sports he plays. He also loves to play basketball, which might just be his favorite sport. Alex understands how important good nutrition is to staying healthy and active. “I stopped drinking soda,” he says, “and when I’m hungry I snack on fruit or carrot sticks.

On a warm September evening on Noyes Playground in East Boston, Alex considers joining a baseball game in progress, until his mother, Darice, reminds him that he has homework to do. Alex is the youngest of her three sons—and she describes herself as “lucky” that they have all been “good kids,” but one suspects that Darice, a dental hygienist, and her husband Gary, who is a supervisor with

the Postal Service, had a little something to do with it.

In 2009, East Boston was chosen to be a pilot site for CHAMPS Boston, a sports-based youth development initiative of the Boston Foundation that focuses on strengthening out-of-school time activities. CHAMPS stands for Coaches Helping Athletes through Mentoring and Positive Sports—and while it distributes donated sports equipment and uniforms, refurbishes fields and invests in youth programs throughout Boston, its primary goal is to train great coaches.

Jimmy Caruso, a member of the East Boston Athletic Board and a seasoned coach himself, says that he gained “tremendous insight” from the program. “East Boston was fortunate to team up with the Boston Foundation,” he explains, “and to be the first neighborhood to have all 165 of our coaches trained.”

Alex says that he thinks East Boston’s coaches, many of whom are fathers of friends, benefited from the training. “I think it teaches them to be more patient,” he says, “to take the time to show us how to do things.” When asked what he gets out of playing sports, he thinks for a moment and then says: “Great friendships with the other players, especially if you play in a championship game together, but playing sports also teaches you to be more mature and disciplined—and those are lessons you can use in all parts of your life.”

Alex hopes to go on to play sports professionally, but short of that, would like to be involved with sports in some way—possibly on the management side of things. If nothing else, he thinks he will most likely be a coach in his spare time.



(From left): Boston Celtics Captain Paul Pierce and Boston Foundation Vice President for Program Robert Lewis Jr., at the official launch of CHAMPS Boston on November 4th 2010 at TD Garden



Julienne Christie Pingree

Julienne Christie Pingree was born in Boston in 1872, the daughter of Sarah White Merrill and Moses Merrill. For 25 years, her father served as the headmaster of Boston Latin School, the oldest school in America. In 1903, Julienne married Arthur Howe Pingree, a minister who had graduated from Boston Latin School and Harvard College. Reverend Pingree became the minister of the First Congregational Church of Norwood, Massachusetts and was widely known for forming one of the first Boy Scout troops in the United States. He and Julienne, who was known for her “can do” attitude and devotion to community, were beloved by their congregation.

Just 12 years into their marriage, in the summer of 1915, Arthur Pingree died while attempting to save two girls from drowning in Gloucester, Massachusetts. Julienne lived for 42 more years. When she died, in 1957 at the age of 85, she left an unrestricted bequest to the Permanent Fund for Boston.

Today she is helping Alex Maghsoudi learn valuable life lessons from his coaches.

CHAMPS Boston

There are hundreds of volunteer coaches throughout the city of Boston, who spend their spare time devoting themselves to the young people of our city. Alex Maghsoudi's East Boston coaches—and numerous other coaches—have benefited from a Boston Foundation initiative called CHAMPS Boston, which provides youth development training for them, as well as funds for sports equipment, uniforms, refurbished fields and capacity building activities for youth sports leagues. The initiative reaches out to inner-city teams and organized leagues, including those participating in the sports of baseball, softball, basketball, football and soccer.

The mission of CHAMPS, which stands for Coaches Helping Athletes through Mentoring and Positive Sports, is to ensure that every child in the city has access to high quality athletic opportunities—beyond school hours—including new equipment and safe and clean fields, and that all youth coaches are of the highest quality and understand the fundamentals of youth development through sports. With the ultimate goal of making Boston a national leader in youth sports, the Boston Foundation has committed \$2 million over four years to CHAMPS.

During the CHAMPS pilot program in 2009, 600 coaches were trained and 12,000 inner-city youth experienced high quality sports offerings during after-school hours. Since then, an additional 700 coaches have been trained and 10,000 more young people have benefited. And in the summer of 2011, CHAMPS also placed portable bathroom facilities in a number of parks and funded a “healthy food and drink” concession stand in Roxbury's Jim Rice Field to replace sugary beverages and candy with healthy sports bars, water and fruit.

Alex Maghsoudi, with his mother
Darice in the background



“It’s Never Too Late”

“**A**ttending college was always a goal for me,” says Karen Furtado, “but when I found out I was pregnant at the age of 18, I had to put my goals on hold.” Karen would go on to have four children, working full-time while raising them, mostly as a single mother. While working and being a mother, she was determined to pass the GED that would some day allow her to go to college, and she accomplished that on her own, studying books at her local library. “They finally let me take the books home with me,” she said, “because I was there every day.” Now that her children are grown, her dreams are no longer on hold. She plans to be a nurse.

One day, a couple of years ago, Karen walked by a bulletin board at Children’s Hospital, where she works in the finance department, and saw a flyer for a Jewish Vocational Service (JVS) program called “Bridges to College.” She had already taken one college prep course, but it hadn’t adequately prepared her to take college entrance exams. “I thought to myself, this is just the break I needed,” she says. “I always tell my kids that if the door of opportunity opens, you should walk through it.” She immediately called JVS to take their assessment test.

Bridges to College prepares adults to bypass remedial courses and enter directly into college-level, credit-bearing coursework. In partnership with Bunker Hill Community College and area employers, including Children’s Hospital, JVS offers reading, English and math classes as well as academic coaching and test preparation. Its focus is on those who are interested in entering the health care field or advancing in a current position they hold in health care.

Karen cannot say enough good things about JVS staff members, who have offices near the complex of buildings that make up Children’s Hospital. “The training and academic coaching played a key factor not only in getting accepted to Bunker Hill,” she explains, “but allowing me to place into credit courses instead of remedial courses. I am currently in my third semester and taking the prerequisites I need for my nursing degree.” She maintains an “A” average, and gives much of the credit to the staff at JVS. “This is the best team anyone could have on her side,” she says. “They are always available for any kind of assistance whether it is finding tutors or giving positive input on homework assignments.”

Karen was nervous when she was asked by JVS to speak at a ceremony this summer for those who have graduated from its classes, but she rose to the occasion. “My children were sitting in the front row,” she says. “It was important to me that they see me moving forward and having goals. I want to lead by example and let them know that they can do anything they want with their lives. It’s never too late to open that door of opportunity and walk through it.”



Karen Furtado with JVS’s Ben Lappen and Margaret McPartland



Edward Glines

Born in 1849 in Somerville, Edward Glines was too young to serve in the Civil War, but when the Spanish-American War broke out, he volunteered and was commissioned a captain by President McKinley.

Edward went on to hold numerous positions in government—first as a Massachusetts Representative, next as a State Senator and finally as the Mayor of Somerville, from 1901 to 1904.

Besides being a public-spirited citizen, Edward was a highly successful businessman, running the Glines Company, which provided supplies to the best hotels in Boston. He also was known as a generous contributor to public and private charities and widely admired. “Few if any men in business in Boston stand higher in the estimation of their associates,” said one newspaper article of the day.

When Edward died in 1938, at the age of 89, he left a major, unrestricted bequest to the Permanent Fund for Boston.

Today he is helping Karen Furtado achieve her dream of becoming a nurse.

Jewish Vocational Service

Jewish Vocational Service (JVS), a nonsectarian nonprofit founded in 1938, is one of Greater Boston's most effective providers of adult educational and vocational services—offering nearly 20,000 people keys to the future every year. JVS' Bridges to College, which is helping people like Karen Furtado fulfill their dreams of pursuing health care careers and building better lives for themselves, received a three-year \$300,000 grant from the Boston Foundation in 2010—and several other JVS programs are supported through the Foundation's partnerships.

The Foundation is a major partner in the Boston Opportunity Agenda, and JVS is playing a key role in the Agenda's new Adult Opportunity Network. The goal of the Network is to dramatically increase the number of Boston adults who are ready for college and a career. The Boston Foundation also founded SkillWorks, a public-private partnership that brings together funders, government, community organizations and employers to address the goal of helping low-income people prepare for well-paying jobs. This year the Foundation made a two-year \$800,000 commitment to the initiative.

Through SkillWorks, JVS is the lead agency for the Healthcare Training Institute, which offers a continuum of career advancement services to prepare adults for careers in allied health and nursing with major health care employers in our area. Through all of its programming, JVS is helping thousands of adults, including many immigrants to Boston, achieve their dream of attaining well-paying, family-supporting jobs.

Karen Furtado in front of Children's Hospital

Children's Hospital

Ranked #1

US News & World Report

Main Entrance



“I Think He Saw the Hunger in Me.”

Antwann Johnson was walking down the street in Roxbury with his cousin one day when he noticed a lot of Streetworkers in the area. “I think there was some recent trouble around there, so they were out,” he says. One of the Streetworkers had been a friend of Antwann’s family for years and reached out to him. “I think he saw the hunger in me,” says Antwann. “He said he could put me in a good situation. A few days later he introduced me to Conan Harris.”

Conan Harris is a Program Coordinator for StreetSafe Boston, an initiative of the Boston Foundation that is dedicated to dramatically reducing violence in the city by deploying Streetworkers to connect with underserved youth and then connect them with programs and services. Its slogan is “A Way Out. A Way Up.” And that is exactly what StreetSafe offered Antwann.

“I was never a troublemaker,” says Antwann, “not drug dealing, never stole—but I was hustling, hanging with the wrong people. I was heading for trouble.” Antwann knew he could trust Conan and the rest of the StreetSafe staff.

“They’re from the community,” explains. “That’s the key to everything. You have to have people from the community deal with the community’s issues.”

Conan introduced Antwann to Rodney Dailey, StreetSafe’s Workforce Development Manager, and he helped him get a job at Boston’s Holiday Inn Express, where Antwann is earning the respect of the hotel’s manager, Dennis Callahan, who is so enthusiastic about StreetSafe that he has told managers of other hotels about it. Now Antwann is able to buy things for his two children, a four-year-old daughter and a two year-old son. And he’s starting to think about going to college.

“Conan is like a big brother to me,” he says. “I call him when I’m having a bad day and I call him when I’m having a great day,” he says. “He likes those calls. Some days you just wake up and you think ‘Thank God, I woke up and I’m feeling good’ and I look in the refrigerator and there’s food. A lot of brothers aren’t making it.”

Antwann is eloquent about the heavy load of sadness he carries with him. He lost his “strong, beautiful, humorous” mother to cancer a number of years ago, although he’s proud that she got to see him graduate from high school before she died. And recently he has lost other family members and friends to illness or violence.

“This is one of the toughest summers I’ve ever experienced,” he says. “Illness, tragedy, carnage on the streets. You can’t even go to the park and enjoy family time without worrying that you’ll be dodging bullets. Just walking down the street with your kids, you have to be vigilant. I don’t know when that’s going to change.” What he does know, though, is that as long as he’s got Conan Harris and StreetSafe on his side and “the power of prayer,” he’s not walking down the streets of Boston alone.



Antwann Johnson with Dennis Callahan



David R. Pokross

David R. Pokross is remembered for his work with a prominent Boston law firm and for serving on the boards of Boston's leading institutions, but these connections were not his birthright. He was born in 1906 in Fall River among people of modest means who worked in the mills. He went on to attend Harvard Law School but, in spite of his magna cum laude record, he encountered a seemingly impenetrable wall of anti-Semitism when he applied to law firms. Finally, he was hired by Peabody & Brown—now Nixon Peabody—where eventually he became a partner.

Over the years, he gave countless hours to Boston's nonprofits and served on the Boston Foundation's board for 12 years. In 1997, the Foundation announced the *David R. Pokross Fund for Children in Need*, which has been contributed to by numerous friends and admirers.

The above photo is of David Pokross and his dear wife Muriel Pokross. Muriel died just this year and we honor her memory.

Today, eight years after his death in 2003, he is helping Antwann Johnson transform his life.

StreetSafe Boston

The Streetworker who first reached out to Antwann Johnson, as well as Rodney Dailey, who helped him get a job, and Conan Harris, who continues to counsel him, are all members of the Boston Foundation's StreetSafe Boston initiative. StreetSafe is an ambitious, multi-year initiative that takes a unique, holistic approach to preventing youth violence—an approach that is garnering national, even international attention.

It focuses on the most economically disadvantaged areas of Boston, where the vast majority of shootings occur. The goal is to provide young adults with the guidance they need to move away from violence and toward positive alternatives. After a Streetworker makes contact and gains the trust of a young person, StreetSafe's Program Coordinators connect them with a vast array of services, from housing to health care to education, partnering with service providers that represent some of Boston's most highly-regarded social, health, education and employment resources.

StreetSafe's *Workforce Development Partnership* reaches out to local companies to place young adults in jobs. In the process, it provides opportunities for the business community to have a significant impact on reducing violent crime in the city—an opportunity that Dennis Callahan, Manager of Boston's Holiday Inn Express, has embraced.

For young adults, jobs mean self-respect, independence, a feeling of being valued and the knowledge that they are contributing to their family's well-being. When StreetSafe provides young adults, like Antwann, with the skills and the ability to earn a living, it also gives them a sense of hope for the future and the keys to better lives.

Antwann outside Holiday Inn Express



 Hilton
Express
ANTWANN
BOSTON

Thriving People. Vibrant Places.

The work of the Boston Foundation is guided by two overarching goals that reflect our deep commitment to strengthening the Greater Boston community through grantmaking, civic leadership and enhancing donor impact:

Greater Boston residents are successful and thriving

Greater Boston communities are vibrant, safe and affordable

As we work to meet these goals, we strive to have a profound impact on important areas of community life, including: dramatic improvements in education and health attainment; safe and vibrant neighborhoods; robust arts and cultural participation; and a local and regional economy that enables everyone to thrive.

All of the Tools in the Toolbox

We use all of the tools in our toolbox as we work toward measurable results in areas where we seek to move the needle. These tools include: working closely with our donors to increase the impact of their giving; commissioning and publishing cutting edge research; inviting the community to a series of forums and conversations; convening grassroots and civic leaders to join powerful and diverse task forces and coalitions; informing and working with the media; engaging in deep public policy work; and investing our grantmaking resources in programs and initiatives that are aligned with the results we seek.

Support for all of these activities comes from the Permanent Fund for Boston, which has been built over the years through gifts and bequests from hundreds of generous donors.

On the following pages you will read about just some of our work during 2011—including a brief summary of the strategies we are pursuing, some of the outcomes we hope to see, and highlights of the progress we made this year in partnership with our donors and numerous nonprofit, philanthropic, business and civic organizations.

Goal: Greater Boston residents are successful and thriving

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

Strategy: Accelerate structural reform and promote autonomies in public schools in Boston

Through this strategy, we seek to double the number of seats in autonomous schools, such as new charter, pilot and innovation schools, in Boston by 2015—and improve student performance along the entire education pipeline. Here are some highlights from 2011:

- The Boston Foundation convened a diverse coalition, called **Put Students First**, that is working for change in Boston's schools and calling for a new Boston teachers' contract to better serve our city's children.
- We also continued work with the **Race to the Top Coalition**, which played a key role in passing education reform—and now is monitoring the implementation of reforms, such as a longer school day.
- Among our strategic grants are \$100,000 to **Unlocking Potential**, to open the UP Academy, a Horace Mann, in-district charter school, and \$1 million over five years to the **NewSchools Venture Fund**, to support the replication of high performing charter schools. We have also made major investments in **Mass 2020** and its leadership of the Extended Learning Time schools network, and in the efforts of **Teach Plus** to engage teachers in education reform.
- Three significant reports were released at forums, including *The Real Cost of the Contract: An Analysis of Salary and Benefits of Boston Public Schools Teachers*, and *School Funding Reality: A Bargain Not Kept*, about the soaring costs of school employee health care in the state that are eating up all other funds for public schools. We also released the Boston Indicators Project's second annual *Education Report Card* online.



Strategy: Increase the 2- and 4-year college graduation rate for low-income students of color and first-generation college students from Boston's public schools

Striving to increase from 35% to 70% the college completion rate for Boston Public Schools graduates by 2017, the Foundation and its partners made real progress in 2011.

- Our major investment is in the **Success Boston College Completion Initiative**, a partnership of the City of Boston, the Boston Public Schools, the Boston Foundation, the Boston Private Industry Council, colleges and nonprofits including ACCESS, Freedom House and Hyde Square Task Force. Success Boston graduated its first class of college students this year. The Foundation has committed \$1 million annually for this initiative.

- Some 38 area universities and colleges came together to support Success Boston this year, and their commitments to the initiative were outlined in the report, *Getting Through: Higher Education's Plan to Increase the College Completion Rates of Boston Public Schools Graduates*.
- Another report, published by the Foundation, was titled *How Students Are Making It: Perspectives on Getting Through College from Recent Graduates of the Boston Public Schools*.

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

By 2015, our aim is to contribute to a 50% increase in adult students who are achieving their goals for advancement through Adult Basic Education (ABE) and classes in English for Speakers of Other Languages (ESOL)—as well as a 9% increase in the number of Boston families earning livable wages.

- This year the Foundation published two major reports: *Breaking the Language Barrier: A Report on English Language Services in Greater Boston*, researched by the Commonwealth Corporation, was the first detailed study of ESOL services offered to immigrants in our community; and *When Untapped Talent Meets Unmet Need* evaluated the Foundation's successful **Allied Health Initiative**.
- **SkillWorks**, a public/private partnership co-founded by the Boston Foundation in 2003, received \$800,000 over two years from the Foundation to continue its work training thousands of people to participate in Greater Boston's economy. SkillWorks has invested more than \$15 million to help some 3,000 people receive training.
- Strategic grants awarded included \$450,000 over three years to **English for New Bostonians** to support ESOL providers in the city, and \$225,000 to the **Boston Earned Income Tax Credit Action Coalition** over three years for an expansion of its Disability Initiative.



The Boston Opportunity Agenda

Spanning All of Our Objectives and Strategies in Education

The Boston Foundation is a co-founder and major funder of the historic Boston Opportunity Agenda, a partnership of the City of Boston, the Boston Public Schools, all of Boston's major charities and many of its foundations. The agenda is a "cradle to career" effort with ambitious goals across the entire education pipeline. This year the Agenda hired Kristin McSwain as its first Executive Director, launched a new Adult Learning Network and expanded a Summer Learning Project. The Agenda also released its First Annual Report Card this September, showing progress across the entire education pipeline and drawing attention to areas that are not progressing, such as 3rd Grade Reading Proficiency.

Objective: Increase the health and wellness of Greater Boston residents

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

Through this strategy, the Foundation focuses on reducing the number of Boston children who are either overweight or obese from today's 44% to 35% in 2015, and to measure over time a number of important benchmarks, such as greater availability of fresh foods and increased physical activity for children. The Foundation also seeks to strengthen the level of state public health expenditures from the current \$527 million to \$625 million by 2015.

- The **Healthy People/Healthy Economy Coalition** was launched by the Foundation and NEHI at a press conference at the State House in November of 2010, with the goal of making Massachusetts the preeminent state in America for health and wellness. The Coalition was created in response to the epidemic of preventable chronic disease that threatens to crowd out investments in all of the other areas.
- The Healthy People/Healthy Economy Coalition released its *First Annual Report Card*, which grades 14 different health indicators in four areas: physical activity; access to healthy foods; investments in health and wellness; and citizen education and engagement.
- Another coalition convened by the Foundation filed legislation on Beacon Hill to remove the favored tax status for sugar-sweetened beverages and candy, require physical activity in schools and encourage healthy food businesses in underserved areas.
- Through its Understanding Boston series, the Foundation also held several forums on health, including *Soda, Snacks and the Obesity Epidemic* and *Active Bodies, Active Minds: The Need for Physical Activity in School*.
- The Foundation supports NEHI's research and work on the Healthy People/Healthy Economy Coalition



with a grant of \$375,000 over three years. Multi-year investments were also made to organizations that focus on providing young people with physical activities. They included \$400,000 to **Playworks**, a national



organization that is providing physical activities to 32 schools throughout Greater Boston, in the process accelerating learning and health for hundreds of children; and \$300,000 to **Sportsmen's Tennis & Enrichment Center**, which is providing physical activity to students from many Boston schools. Grants also supported organizations providing healthy food to Boston's neighborhoods, including \$270,000 over three years to **Bowdoin Street Health Center** for its Farmers Market.

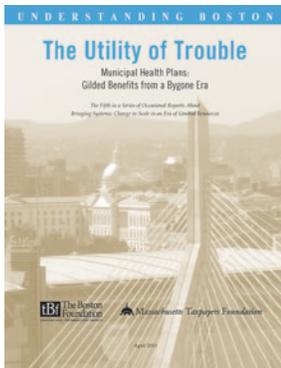
Goal: Greater Boston neighborhoods and communities are vibrant, safe and affordable

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

Strategy: Invest in strategies that create, retain and attract workers and jobs in high-growth sectors, in inner-city neighborhoods and in the region as a whole

By 2013, the Foundation wants to increase the number of municipalities participating in the state's Group Insurance Commission (GIC) health insurance plan or gaining authority over their own health plan design, generating \$50 million to \$100 million in savings statewide. By 2015, the Foundation seeks to increase community college degrees in key industries by 5% and increase sales and employment in inner-city business districts.

- This year, the Foundation published, with the Massachusetts Taxpayers Foundation, a report titled



Municipal Health Plans: Gilded Benefits from a Bygone Era, which compared health insurance plans of cities and towns with state GIC and other plans, finding that health plans for city and town employees are far more expensive than others, resulting in cuts in most other municipal services.

- Through this and numerous other reports—and by contributing to the dialogue and mobilizing a coalition of business and civic leaders in support of health care reform—the Foundation played a key role in the passage of **groundbreaking health care reform legislation**—signed into law by Governor Deval Patrick on July 12th, 2011. The legislation gives cities and towns the potential for at least \$100 million in savings and is expected to save jobs and keep public facilities open.

- With \$1 million in total funding over five years, the Boston Foundation has been a major partner in **Achieving the Dream**, a national community college reform initiative.



- The Foundation also commissioned research to support efforts to bring greater alignment between community colleges and employer needs in Massachusetts and released it at a major forum at the Federal Reserve Bank of Boston.
- Grants included \$150,000 over two years to the **Massachusetts Biotechnology Education Foundation** to strengthen that field and \$180,000 over three years to **Interise** to help small business owners.
- This year's **John LaWare Leadership Forum**, which convenes business and civic leaders to discuss challenges and opportunities for our region, focused on the economy and jobs in Massachusetts, with special sessions on the cost of doing business in the Commonwealth and the right economic mix for the state's future.

Objective: Increase the livability, affordability and safety of Boston neighborhoods

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

The Boston Foundation's efforts in this area focus on its **StreetSafe Boston** initiative, which reaches out to proven-risk youth through a Streetworker program and then works to connect them to the mainstream through education, jobs, housing and other services. StreetSafe's goals are to decrease gang-involved shootings by 60% in the five neighborhoods where most shootings take place and decrease youth homicides by 30% in those neighborhoods.

- Working closely with the Boston Police Department's gang unit, the Massachusetts Parole Board, the Department of Youth Services and the courts, this year StreetSafe identified 20 of the city's most violent gangs and the 300 impact players within these gangs, who drive most of the violence.
- StreetSafe is becoming a national, even international, model for violence prevention. After the riots by youth in Greater Britain, Prime Minister David Cameron looked to American cities, specifically Boston, for solutions—resulting in an Associated Press story about StreetSafe that was shown by media outlets around the world.
- In August of 2011, StreetSafe, in partnership with the Boston Police Department, hosted a **Boston by Night** tour



at the request of representatives of the U.S. Department of Justice, Labor and Housing and Urban Development, along with officials from the City of Boston and Boston Public Health Commission.

- The Boston Foundation also has invested \$500,000 over four years in **Boston Medical Center** for its *Violence Intervention Program*, a collaboration with the Boston Public Health Commission, to provide services to victims of violence and their families. **The Martha Eliot Health Center** also received \$60,000 for its *Jamaica Plain Violence Intervention and Prevention Collaborative*, which increases intervention services for victims of violence and their families.



My Summer in the City 2011

The Boston Foundation announced \$710,000 in funding this summer for youth programs. Some \$250,000 went to *My Summer in the City*, which kept parks and playgrounds open after hours with organized activities for youth. Grants to 12 community organizations working with low-income Boston youth offered high quality, extended-hour programs in some 15 neighborhoods and parks, with indoor and outdoor activities ranging from neighborhood block parties to organized sports activities to programs focused on healthy lifestyles.

Objective: Increase the livability, affordability and safety of Boston neighborhoods

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

The Foundation seeks to increase the number of units of housing by 16,800, which represents 30 percent of the shortage of units projected for 2020. In addition, the Foundation seeks to preserve 85 percent of “expiring use” affordable units and 50 percent of “40 year” affordable housing mortgages that were established in the 1960s.

- The Boston Foundation has made an investment of \$1 million over five years to the **Fairmount/Indigo Line CDC Collaborative**, a group of neighborhood based organizations that are creating dynamic, diverse neighborhood centers in Dorchester, Mattapan and Hyde

Park near stations on the Fairmount/Indigo Line, which is being transformed into a rapid-transit like service to link these neighborhoods to the rest of the city.

- This year’s **Greater Boston Housing Report Card** focused on the strong link between housing and the economic crisis while warning that Massachusetts is not immune from the economic stresses affecting other parts of the country.
- The **Commonwealth Housing Task Force**, convened by the Boston Foundation, also continues to monitor the growth of Smart Growth Housing districts, which are supported by state funding that the Task Force helped to secure.
- Major initiatives to strengthen low-income families include the **Family Independence Initiative**, which received a grant of \$450,000 over three years, and the **Metropolitan Boston Housing Partnership**, which was awarded \$500,000 over five years for the Family Self Sufficiency program.
- The Foundation has invested \$700,000 over three years in **Local Initiatives Support Corporation (LISC)** including \$25,000 to develop comprehensive community plans for three neighborhoods under the **Resilient Communities/Resilient Families** initiative.
- Other grants included \$300,000 over three years to the **Massachusetts Association of Community Development Corporations** and \$110,000 over two years to the **Massachusetts Union of Public Housing Tenants**.
- In April of 2011, the Boston Foundation co-hosted a **Healthy Communities Conference** in partnership with the Federal Reserve Bank of Boston focused on the intersections between health and community development. Experts from across Boston participated in panels reflecting both perspectives.



Objective: Enhance civic and cultural vibrancy in Greater Boston

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

The Boston Foundation is dedicated to increasing participation in the arts among Greater Boston's residents and elevating the region's rich and diverse cultures while strengthening the entire arts and cultural sector.



- Through a grant of \$600,000 over six years to Edvestors, the Foundation is a major partner in the **Arts Expansion Initiative**, which seeks to increase the number of Boston Public Schools students receiving once-weekly arts instruction from the 2009 baseline of 67% to 100%.
- In its second year of partnership with the YMCA, the Boston Foundation's **Neighborhood Arts Summer Initiative** engaged youth and families from Egleston Square and Chinatown, using arts and culture to build community.
- Some \$7 million has been approved in the Massachusetts capital budget for the **Cultural Facilities Fund**, which the Boston Foundation played a major role in creating by publishing research about the key role cultural facilities play in the state's economy and by creating a coalition to push for its passage.

- The Foundation has made significant investments in institutions that have regional reach and impact, including the **Boston Ballet**, the **Institute of Contemporary Art**, **Zoo New England**, **Boston's Children Chorus**, **OriginaTions** and the **Theater Offensive**, all of which are making deliberate efforts to reach under-represented audiences.
- Large-scale cultural events that broadly engage residents in the creative life of our community have been important to the Foundation, including grants to **First Night** and **Boston Landmarks Orchestra** for its efforts to reach Greater Boston audiences with free classical music.

Random Acts of Culture

On June 2, 2011, the Boston Foundation held an event to welcome F. Javier Torres as our new Senior Program Officer for Culture and Arts. The guest speaker for the festivities was Dennis Scholl, Vice President for Arts at the Miami-based Knight Foundation. Dennis is known for a program called "Random Acts of Culture," made up of artistic "flash mobs" in public places throughout America with spontaneous performances of classical music, dance, theater or opera. The Boston Foundation surprised him with its own "flash mob" upon his arrival in the lobby of the Foundation's office building in the Back Bay. Participating groups included Rainbow Tribe, Inc., Status Quo Dance Group, Berklee Singers, Genki Spark drummers and singers from the Handel and Haydn Society.





Applying for a Grant

A Focus on People and on Place

The Boston Foundation is two years into implementing its strategic framework—*Thriving People/Vibrant Places*. This strategic framework has focused the Foundation's grantmaking, research, convening, public policy work and special initiatives on eight core strategies that seek to have a profound impact on major issues facing Greater Boston's people and places.

All of the resources for our grantmaking in Greater Boston are from the Permanent Fund for Boston, which has been built over the years through gifts and bequests from Boston area donors who care deeply about our community.

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that are significantly aligned with the two major goals and five objectives below:

Goal: Greater Boston residents are successful and thriving

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

Increase the health and wellness of Greater Boston residents

Goal: Greater Boston communities are vibrant, safe and affordable

Objectives: Increase job growth and economic equity and competitiveness in Greater Boston

Increase the livability, affordability and safety of Boston neighborhoods

Enhance civic and cultural vibrancy in Greater Boston

Types of Support

There are four principal types of support available from the Foundation's discretionary grant making resources:

Competitive Grants: At any point in time, there are 150 to 175 organizations in the Foundation's competitive grants portfolio. Most of these partners are doing work that is highly aligned with the approaches and end-state results to which the Foundation seeks to contribute across its eight core areas of work. A limited sub-set of those partners are doing important work outside of those areas. Over the past two years, the Foundation has made a shift toward making larger, multi-year, operating support grants to core partners, as well as program and project grants where appropriate. Applying for a competitive grant starts with a simple on-line Letter of Inquiry (LOI). Please speak with a member of the Foundation's Program staff before submitting an LOI.

Vision Fund: These are grants of up to \$7,500, awarded to organizations for smaller capacity-building projects, including board development, strategic planning, exploring or piloting a new program area, planning for collaboration with other organizations. Priority is given to organizations that are not likely to be competitive for larger grants. Applying for a Vision Fund grant starts with an on-line application accessed from our website.

Initiative Grants: A significant amount of the Foundation's grant funds are distributed through special initiatives. Often, these funds are not open to broad application—for example StreetSafe Boston, Success Boston, CHAMPS and others. At times—as with SkillWorks—there are periodic Requests for Proposals (RFPs) for organizations that are defined as eligible by the specific initiative. Information about RFPs is available on the Foundation's website.

We invite you to visit our website for detailed information about how to reach us and how apply for a grant. Please go to www.tbf.org

Becoming a Donor

Customizing Charitable Solutions One Donor at a Time

It all begins with you. Your vision joined with our experience means that together we can design a philanthropic plan that meets your goals. We will marry your aspirations and passion for giving with our deep understanding of the important issues facing our communities to achieve results that matter.

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

Expertise and Service That Can Maximize Your Giving

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

Meeting Your Goals Through a Donor Advised Fund

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

Incorporating Charitable Giving Into Your Estate Planning

We also offer many ways to incorporate charitable giving into your estate planning—and will help you decide which type of gift is right for you. You can make a planned gift by will or trust; gifts of retirement plan assets and life insurance; and gifts that pay you income and preserve assets for your heirs. Your gift can benefit any type of named fund or combination of funds (Donor Advised, Designated, Field of Interest or the Permanent Fund for Boston).

Having an Impact Through the Civic Leadership Fund

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

For more information about becoming a donor or making a planned or legacy gift to the Boston Foundation, call the Development Office at 617-338-1700 or visit the Foundation's website at www.tbf.org and choose Giving.

Choosing the Contribution That's Right for You

We accept gifts of cash, stocks and bonds, complex assets, including closely held or restricted stock, gifts of real estate and LLC or partnership interests.

Whether you make a charitable gift during your lifetime or through your estate, we can accommodate your giving plans.

What Will You Be Doing in 100 Years?

Help Us Build the Permanent Fund for Boston

In 1917, a Boston businessman named James Longley left a large bequest to the Permanent Fund for Boston. It was so large that it made Greater Boston's community foundation the first in the country to make grants.

Today, he is helping Boston Public Schools graduate Elisio Depina fulfill his dream of a college education through an initiative called Success Boston, which receives major support through the Foundation's Permanent Fund for Boston.

To mark our 100th Anniversary in 2015, the Boston Foundation is reaching out to our donors and others to establish named funds within the Permanent Fund for Boston and thereby strengthen this critical fund, which supports all of our grantmaking in Greater Boston and gives us the flexible resources needed to respond to the most urgent needs of the day.

We Invite You to Join Us

The Boston Foundation has many ways to incorporate planned and legacy giving into your estate plan to benefit the Permanent Fund for Boston. We can help you decide which type of gift is right for you. You can create a named fund through a flexible, unrestricted gift or direct your gift to an issue or population or cause you care about deeply.

Investing in the Future

Make a permanent gift to Boston's primary endowment with confidence that it will always be used to meet the most urgent needs facing Greater Boston.

For more information about helping us build the Permanent Fund for Boston, call the Development Office at 617-338-1700 or visit the Foundation's website at www.tbf.org and choose Giving.

Ted and Grace Fey have included a bequest to the Permanent Fund for Boston in their estate planning.



2011 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 these objectives.

Fund for the 21st Century

The Boston Foundation offers three separate investment pools within the Fund for the 21st Century. These three 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 three pools. 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 assets of the Balanced Plus Pool include not only traditional stock and bond investments, but participation in private equity, venture capital, real assets (real estate, timber and energy) and flexible capital strategies. Diversification among multiple asset classes helps to reduce the volatility of the Foundation’s endowment and should moderate market risk.

Investment Performance: *as of June 30, 2011*

	1 Year	3 Years	5 Years	10 Years
<i>Fund for 21st Century Investment Options:</i>				
Balanced Plus Pool	17.2%	1.4%	4.4%	5.4%
Balanced Pool (established 2/1/11)	-	-	-	-
Short-Term Pool (established 1/1/10)	0.15%	-	-	-
<i>Indices:</i>				
S & P 500 Stock Index	30.7%	3.3%	2.9%	2.7%
MSCI All Country World Stock Index	30.1%	0.9%	3.1%	4.8%
65% S & P 500 Index/35% BC Aggregate Index	20.9%	4.9%	4.6%	4.1%
Three Month Treasury Bills	0.1%	0.3%	1.9%	2.0%

Notes: Performance is shown net of investment manager fees. Past performance is no indication of future results.

The Spending Policy

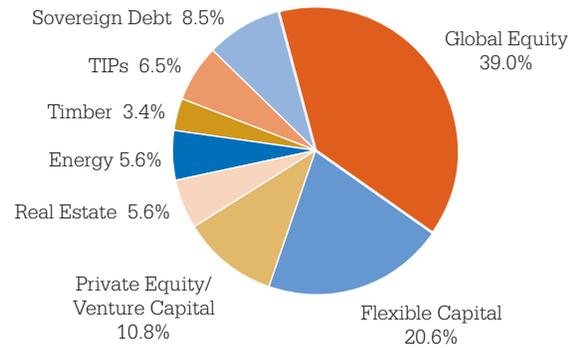
By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2011 spending rate was 6% for its permanently restricted discretionary funds. For Fiscal Year 2012, the Board approved a spending rate of 6.4%. 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 6% spending rate applied to the current market value.

Audited Financial Statements

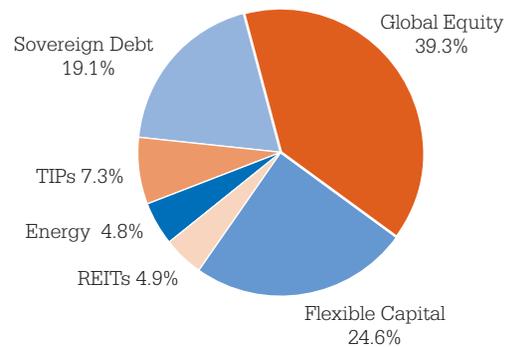
The Foundation's financial statements are prepared under policies and procedures overseen by the Foundation's independent Audit Committee and the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown here. The audited statements are available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

Asset Allocation

Balanced Plus Pool

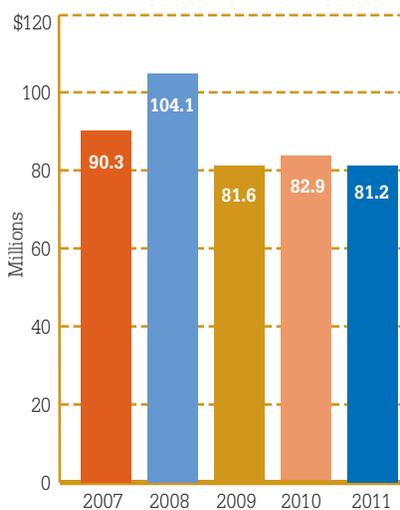


Balanced Pool

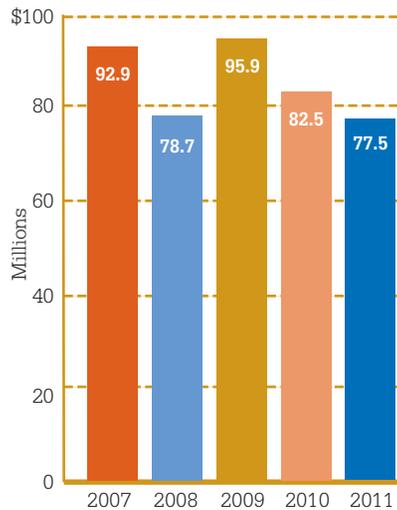


Activity from 2007 through 2011

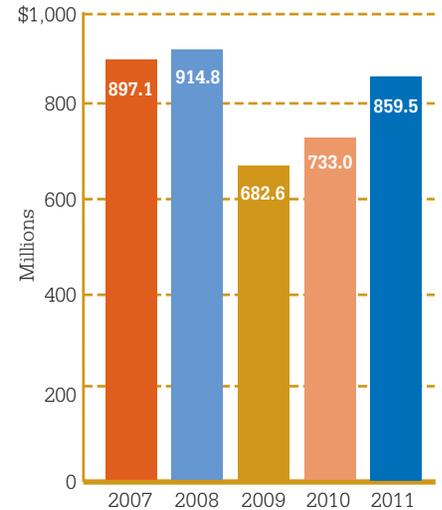
Gifts Received



Grants Paid



Total Assets



2011 Summary Financial Statements

(in thousands)

Assets:

Investments	\$	825,096
Receivables & Other		9,361
Cash Equivalents		<u>25,053</u>
Total Assets	\$	<u>859,510</u>

Liabilities & Net Assets:

Accounts Payable and Other Liabilities	\$	7,290
Grants Payable		2,602
Net Assets		<u>849,618</u>
Total Liabilities & Net Assets	\$	<u>859,510</u>

Revenues:

Contributions	\$	81,215
Net Investment Return		<u>138,854</u>
Total Revenues		220,069

Grants & Expenses:

Grants		77,521
Change in Split Interest Trusts		211
Program Support		4,617
Operating Expenses		<u>11,233</u>
Total Grants & Expenses		<u>93,582</u>

Change in Net Assets		126,487
Net Assets Beginning of Year		<u>723,131</u>
Net Assets End of Year	\$	<u>849,618</u>

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

Boston Foundation Funds

Since the early part of the 20th century, hundreds of individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing and contributing to funds at the Boston Foundation. The Foundation works closely with donors to strengthen their giving—and helps an ever expanding number of individuals and families take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list all of the funds that are held by the Foundation and the many donors who have contributed to them. Each fund has its own name, purpose and history, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston’s community foundation for today and the future.

New Donors to the Permanent Fund for Boston

The Permanent Fund for Boston provides the vital resources the Boston Foundation needs for its grantmaking in Greater Boston. We thank these donors who contributed to this important fund this year.

Anonymous Fund at the Boston Foundation
Mrs. Geraldine Ballotti
Mr. Bobby Buonopane
Ms. Wendy Chen
Mr. Shane Dunn
Mr. Jason Fisherman
Elizabeth D. Goldsmith 2005 Charitable Remainder Trust
Estate of Anne C. Gray
Frances C. Huvos 1983 Trust
Mr. David Kalan

Ms. Barbara and Mr. Barney Keezell
Mason Charitable Remainder Annuity Trust
Mr. Michael Massey
Ms. Julia Morgan
Ms. Amelie L. Ratliff
Ms. Ellen M. Reardon
Dr. Jordan S. Ruboy, M.D.
Reynolds R. and Pamela M. Smith Foundation
Ms. Hungwah Yu and Mr. David J. Elliott

35 New Funds were Established in 2011

The Boston Foundation gratefully acknowledges the generous and community-minded people who established new funds at the Boston Foundation during 2011.

Discretionary Funds

Elizabeth D. Goldsmith Fund for Families

Designated Funds

Cutler Family Education and Animal Welfare Fund
Inez Washabaugh Ward, PNP, Scholarship Fund

Donor Advised Funds

Annie Mae Lewis Fund
Anonymous (2)
Belinda Fund
Best Doctors Charitable Foundation
Buckman Fund

Carol Fazio Charitable Fund
Charlestown Poor’s Fund
Civic Engagement Fund
Clark Family Fund
David Frisbie Family Charitable Fund
Diversity Training Fund
Fay Slover Fund
Free for All Concert Fund
Ginsberg/Kaplan Fund
Green Fund
Gregory and Deborah Laham Family Charitable Fund
Japanese Disaster Relief Fund
John Thomas Kittredge and Charles R. Morehead Fund

Jon Shevell Cancer Fund
Jon Shevell Children’s Fund
Jon Shevell Education Fund
Lindsey A. Rosen Fund
Lisa and Bill Vanderweil Charitable Fund
Mann Family Fund
Ruth and Henry Walter Fund I
Ruth and Henry Walter Fund II
Ruth and Henry Walter Fund III
Ruth and Henry Walter Fund IV
Schwinn Family Charitable Foundation
Sixty-Nine Roses Charitable Foundation
Walsh Brothers Foundation

Planned and Legacy Gifts Received

Many Boston Foundation donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad and diverse group of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, and gifts of retirement plan assets and life insurance. Many of these gifts will support the Permanent Fund for Boston, which allows the Foundation to conduct its grantmaking in the Greater Boston community.

The following planned and legacy gifts were received in 2011 and are very gratefully acknowledged.

Frances H. Anderson Trust - 1994	Ruth S. Holmberg 2003 Charitable Lead Annuity Trust	Harold Whitworth Pierce Charitable Trust
Jessie B. Cox Charitable Lead Trust	Frances C. Huvos 1983 Trust	Estate of Helene K. Sargeant
John W. and Ruth D. Cuming Charitable Remainder Trust	Estate of Sylvia G. Kaplan	Daniel J. Schwinn Charitable Remainder Trust
Estate of Americo Francisco	Mason Charitable Remainder Annuity Trust	Jon Shevell 2003 Irrevocable Trust
Elizabeth D. Goldsmith 2005 Charitable Remainder Trust	Richard W. May Charitable Remainder Trust	Binkley C. & Paula F. Shorts Charitable Lead Annuity Trust
Estate of Anne C. Gray	Joseph and Katherine O'Donnell Charitable Trust	Lawrence Sykes Charitable Lead Annuity Trust
John P. Herrick Residuary Trust		

Rogerson Legacy Society

Named for founders of the Boston Foundation, the Rogerson Legacy Society recognizes those donors who have included the Boston Foundation in their planned and estate gifts to benefit a variety of charitable funds. Through their thoughtful generosity and foresight, these donors have created an enduring legacy to ensure the future strength and vitality of our community. The names that are in bold type include those who plan to leave flexible gifts to the Permanent Fund for Boston or Field of Interest Gifts, which give the Foundation the flexibility to meet the most critical needs of the day.

Mary Lee T. and Peter C. Aldrich	Beryl H. Bunker	Lucy S. Dillon
G. Thomas and Allison Aley	George E. Burden	Ralph J. Donofrio
Howard and Carol Anderson	Nonnie S. Burnes and Richard M. Burnes, Jr.	Joy G. Dryfoos
Diane DeSerras Arenella	Margaret A. Bush	Malcolm Dunkley
David Arnold, Jr. and Dorothy Arnold	Frank and Ruth Butler	Catherine Axon and Thomas M. Elder
Mrs. John Atkinson	Robert B. Canterbury	Anita Maria Elliott
Geoffrey D. Austrian	Helen T. W. Chen and Keith R. Ohmart	Amy Zell Ellsworth
Theodore S. Bacon, Jr.	Edward A. and Penny Cherubino	Marjorie B. Esselen
Sherwood E. Bain	Arthur D. Clarke and Susan P. Sloan	Grace and Edward Fey
Mary Barber	Margaret J. Clowes	June M. Ficker
Rich Becker	Frances F. Connelly	Joe Fiorello
Laurie A. Bencal, CPA	Lewis and Constance Counts	Walter Eugene Geier*
Doreen B. Biebusch	Barry B. Corden and Ian F. Lane*	Robert J. Glaser, M.D.
Thomas W. Bird	Elizabeth D. Cox	Sandra and Philip Gordon
Beryl H. Black	Diane Currie	Kate and Thierry Guedj
David Blot	Elizabeth T. Damon	Dr. G. Anne Guenzel
Janine Bouchard	Marilyn Darling	Thomas Hale
Kenneth S. Brock	David S. and Mrs. Shirley G. Dayton	Charlotte I. Hall
Jacob F. and Barbara C. Brown		Mrs. Chester Hamilton

Marilyn L. Harris
Barbara Hauter Woodward
Ann S. Higgins
Petie Hilsinger
Kenneth D. and Cynthia L. Holberger
Chuck and Gayle Holland
Helen R. Homans
Marjorie Howard-Jones
Muriel Hurovitz
Brian Hyde
Jane Wegscheider Hyman
Stephen G. and Rosemarie Torres Johnson
Helen M. Jones
Karen A. Joyce and John Fitzgerald
Ms. Ruth G. Kahn
Mr. Andrew M. Kamarck
Christian F. Kearney
Gary P. Kearney, M.D. and
Susan Kearney
Michael C. Kearney, M.D.
Shanon C. Kearney
Alison Kearney North
Jonathan M. and Judith B. Keyes
Vera Kilstein
Alan J. Greenfield and G.P. Paul Kowal
Barbara N. Kravitz
Peter and Stephanie Kurzina
Frances J. Lee-Vandell
Carol F. Levin
John H. Livens
Donald J. and Susan Kelley MacDonald
Myron* and Barbara Markell
Robert and Poppy Mastrovita
Stephen J. McCarthy
Alice McGrath*
Edward J. and Jane S. Michon
Robert Minnocci
Timothy and Deborah Moore
Charles Fessenden Morse
Donald M. Morse
Katharine S. Nash
Frederick W. Neinas, MD

Mary Greene Nelson
**F. William Nigreen and
Kathleen McDermott**
Carl H. Novotny and
Rev. Judith Swahnberg
Mark A. and Judith A. Osborne
Jennifer Jossie Owens
Douglas D. and Geraldine Payne
Nancy E. Peace
Drs. Robert A. and Veronica S. Petersen
Agatha W. Poor
Nathaniel Pulsifer
Glendora M. Putnam
Irving W. Rabb
Warren Radtke and
Judith Lockhart Radtke
Chris Remmes
Richard L. Robbins
Gary and Natalie Robinson
Sumner and Helen Rodman
Eleanor L. Ross
Edith M. Routier
Jordan S. Ruboy, M.D.
John A. Russell
Beverly H. Ryburn
Anthony Mitchell Sammarco
Wendy Sanford
Margaret Schmidt and Kenneth Danila
Ruth Gessner Schocken
Charles R. Schroeder
Norman J. and Maryellen
Sullivan Shachoy
Annabelle W. Shepherd
Binkley and Paula Shorts
Ellen L. Simons
Cheryl H. Smith
William F. Spang
Scott E. Squillace and Shawn M. Hartman
David F. Squire
Thomas W. Stephenson
Arthur L. Stevenson
Ellen Stillman
Anne B. Stone

Elihu and Bonnie Stone
Congressman Gerry E. Studds* and
Dean T. Hara
Anne Thompson
Libby and Sidney Topol
Alan and Pamela Trefler
David F. Tuttle, Jr.
Jean-Paul and Rebecca Valette
Joy E. Van Buskirk
Peter S. and Pamela L. Voss
**Robert R. Wadsworth and
Catherine E. Moritz**
J. H. Walton, Jr. and Carolyn Walton
Gordon Weil, Jr.
Elizabeth A. Wheeler
Constance V. R. White
Eric S. and Linda H. White
Jeffrey and Theresa Whitehead
Inge J. Wetzstein
Michael N. and Mary M. Wood
Eleanor D. Young

Anonymous Society Members = 82

* Deceased

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

Donors to the Civic Leadership Fund

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

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 Emily & Bernard H. Mehlman Fund
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 Mellows Fund
 Robert T. P. Metcalf
 Jack and Beth Meyer
 Mill River Foundation Fund
 Scot A. and Lorraine L. Miller
 Gabrielle J. Miller Donor Advised Fund
 David and Mary Ellen Moir
 Michael E. Mooney
 Ruben and Evelyn Moreno
 Herbert E. Morse
 Morton and Dinan Danseyar
 Family Foundation
 Frances S. Moyer
 Muddy Pond Trust Fund
 David G. Mugar Fund
 Sherif and Mary Nada
 NAIOP Massachusetts
 Tami Nason and Kent Lage
 National Development Associates of
 New England, LP
 National Grid
 Max Nibert
 F. William Nigreen
 Northern Trust Bank
 Novack Family Foundation
 Novotny/Swahnberg Fund
 Mark E. Nunnelly and Denise M. Dupre
 Judith H. Obermayer
 Joe O'Donnell
 Thomas L. P. O'Donnell
 Tamaki Ogata
 Ronald P. O'Hanley
 Pauline O'Leary and Mr. John Malarkey
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 Elizabeth Pauley
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 Jeffrey Poulos
 Margaret Mack and John Powell
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 Red & Blue Foundation
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 Marita Rivero
 Mitchell Roberts
 Gary and Natalie Robinson
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 Alfred F. Van Ranst, Jr.
 Wilderness Point Foundation
 William J. and Linda M. Walczak
 Charles A. Walsh
 Orlando C. Watkins
 Robert W. and Joan S. Weinstein
 Charles Wibiralske and Katherine Lapine
 Benaree P. and Fletcher H. Wiley
 George and Judy Wilson
 Winn Development Company
 Lovett-Woodsum Family Fund
 Hungwah Yu and David J. Elliott
 Zabin Charitable Fund
 Peter and Ellen Zane
 Zug Family Fund

Discretionary Funds

Many donors have established funds that are totally unrestricted or have quite 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 crucial resources they need to respond to the most critical issues facing contemporary Greater Boston. The Foundation is dedicated to building this important fund that supports crucial activities in education, health, housing, workforce development, arts and culture—and all areas that have an impact on Greater Boston. The following includes donors who have made gifts totaling more than \$5,000 to this fund, with the year of their first contribution noted in parentheses.

Individuals, Corporations and Foundations

Anonymous (2004)
Mr. and Mrs. Pelealter Brooke (1994)
The Boston Company (1991)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
Catherine and Paul Buttenwieser
Foundation (2003)
William Putnam Cabot (1970)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation,
Inc. (2007)
Michael F. Cronin (2004)
Lawrence and Susan Daniels Family
Foundation (2003)
Wm. Arthur Dupee Memorial Fund
(1984)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
First National Bank of Chicago (1988)
Martha M. Fosdick Fund (1978)
John Lowell Gardner Fund (1987)
Grand Bostonians Dinner (1984)
Anne C. Gray (2010)
Mrs. Jean Hanlon (1991)
Haymarket People's Fund (1994)
HBB Foundation (1995)
Katherine B. Hood (2000)
Donald J. Hurley Memorial Fund (1978)
Jane W. Hyman (2002)
Institute for Affirmative Action (2007)
Mr. Stephen P. Jonas (2007)
John S. and James L. Knight Foundation
(2009)

Dr. & Mrs. Arthur R. Kravitz (1987)
Mr. and Mrs. Gael Mahony (1982)
The Overbrook Foundation (1991)
Francis Ward Paine Foundation, Inc.
(1982)
Harry & Minnie Rodwin Memorial Fund
(1975)
Pamela M. Smith (2006)
Reynolds R. and Pamela M. Smith
Foundation (2008)
Dr. W. Davies Sohler, Jr. (1990)
Mrs. Helen Spaulding (1992)
Matthew J. & Gilda F. Strazzula
Foundation (2000)
Gertrude T. Taft (1956)
Tech/Ops, Inc. (1982)
United Asset Management Corporation
(1994)
Ms. Hungway Yu and Mr. David J. Elliott
(2002)
Albert and Judith Zabin (2008)

Estates

Alice A. Abbott (1967)
Matilda S. Alley (1964)
Miriam S. Alley (1965)
Margaret Sears Atwood (1970)
Margaret E. Babcock (1973)
Annie O. Baldwin (1953)
Wilbert S. Bartlett (1969)
Reginald Bunting (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. Claffin (1992)
William H. Claffin (1983)
Winifred I. Clapp (1990)
Horace W. Cole (1992)
Anastasia Conte (1988)
Arthur S. Cummings (1943)
Charlotte E. H. Curtis (1940)
Maria Corinne Dana (1963)
Luisita L. Denghausen (1990)
Kenneth S. Domett (1960)
Mary Frances Drown (1929)
George H. Eastman (1971)
Benjamin Fisher (1996)
Edith R. Fottler (1948)
Alma L. Frost (1948)
Anna C. Frothingham (1941)
Forrest C. Gates (1970)
Mary M. Geist (1982)
Pauline S. Germeshausen (2006)
Anne C. Gray (2010)
Donald Gregg (1963)
Patricia Grisham (1964)
Joseph Guild (1964)
John Hagopian (2002)
Ellen Page Hall (1931)
Dorothy C. Harris (1967)
Elizabeth M. Hay (1972)
Fred R. Hayward (1969)
Elizabeth D. Herteli Trust (2005)
Vladimir H. Herteli Trust (2005)
Anna P. Hills (1969)
Agnes G. Homes (1961)
Adeline D. Hooper (1973)

Mary Frothingham Hooper (1961)
 Elizabeth B. Hough (2002)
 Elizabeth B. Hurley (2000)
 Frances A. Jordan (1978)
 Paul Kimball (1964)
 James G. Knowles (1982)
 Ida Fales Lamb (1967)
 James Longley (1918)
 Clara N. Marshall (1943)
 Ann G. McFarlane (2000)
 Arthur W. Moors (1950)
 John Wells Morss (1940)
 John Adams Paine (1967)
 Winthrop D. Parker (1967)
 Annie S. Penfield (1979)
 Blanche E. Philbrick (Merchant E. Philbrick Fund) (1965)
 Mary N. Phillips (1974)
 J. Christie Pingree (1957)
 Carrietta W. Proverbs (1984)
 Bertha J. Richardson (1975)
 Frank L. Richardson (1975)
 Mabel Louise Riley in memory of Charles Edward (1972)
 Riley and Agnes Winslow Riley (1972)
 Helen S. Sharp (1966)
 Frank R. Shepard (1954)
 Anne G. Shewell (1984)
 Alice Wilder Smith in memory of Frank Langdon Smith (1968)
 Eleanor Smith (1986)
 Pamela M. Smith (2008)
 Francis M. Stanwood (1961)

Albert J. Stone, Jr. (1960)
 Mary P. Stone (1948)
 Lenna R. Townsend (1952)
 Willis S. Vincent (1940)
 Clarice M. Wagner (1993)
 John M. Ward (1927)
 Madeline Cobb Webber (1973)
 Louise M. Weeks (1944)
 Arthur W. Wheelwright (1963)
 Estate of Stetson Whitcher (2008)
 Joseph A. White (1979)
 Edward E. Williams (1950)
 Lizzie A. Williams (1951)

Trusts

Margaret Shaw Allen Trust (1982)
 James R. Bancroft Trust (1983)
 Helen C. Barker Trust (1990)
 Nancy Beals Trust U/W (1984)
 Reginald Benting Charitable Remainder Unitrust (2009)
 Richard A. Berenson Family Trust 1972 (2000)
 Nelson Bigelow Trust (1990)
 Mabel M. Brown Trust (1991)
 Ellen E. Carroll Trust U/W (1979)
 Robert M. Christison Trust U/A (1984)
 Ford H. Cooper Trust (1982)
 Anne H. Davis Trust U/Ind (1964)
 Gladys Dean Trust U/Dec (Laurence Guild Dean Fund) (1977)
 Paul Elliott Trust U/Agreement (1991)
 Ruth S. Frake Trust Bequest (1981)

Carrie A. Hartley Trust U/Ind (1963)
 Helen P. Hennessey Trust (1984)
 Ada H. and Clara Hersey Trust U/Ind (1955)
 Elizabeth D. Herteli Trust (2003)
 Vladimir N. Herteli Trust (2003)
 George L. Hill Trust (2002)
 Mark Hyman, Jr. Insurance Trust (1999)
 Cyril H. Jones Trust U/Ind (1974)
 Pauline Kleven 1988 Trust (1990)
 Aimee Lamb Trust U/Ind in memory of Winthrop and Aimee Sargent (1980)
 Barbara Estabrook Livermore Trust (1982)
 Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund) (1973)
 Adalaide Sargent Mason Trust (1982)
 Phyllis McGillicuddy Trust (1993)
 Ethel Fay McGuire Trust U/Ind (1973)
 David D. Moir Revocable Trust (1992)
 Gertrude Morrison Trust U/Ind (1965)
 Hetty R. Phillips 1974 Trust (1980)
 Robert O. Preyer Charitable Lead Unitrust (1992)
 Esther Frances Quinn Trust (1995)
 Harriet Rogers Unitrust (1990)
 Florence M. Scott Trust U/W (1971)
 George F. Shadwell Trust (1990)
 J. de Vere Simmons Trust (1985)
 Edson B. Smith Trust U/A (1984)
 Irene C. Smith Trust U/A (1975)
 Florence Snelling Trust (2006)
 Spaulding-Potter Charitable Trusts (1972)
 Margaret Castle Tozzer Trust U/Ind (1978)

NAMED FUNDS AND FIELD OF INTEREST FUNDS

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

Many of these funds were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them. The year the fund was established is listed in parentheses.

Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics
 Emily Tuckerman Allen Fund (2006)
 Anonymous Fund (1987) unrestricted
 Edith M. Ashley Fund (1960) primarily for the aid of blind and crippled persons
 Geno A. Ballotti Fund (1984) unrestricted
 Irene W. Bancroft Fund (1997) unrestricted
 Harriett M. Bartlett Fund (1987) unrestricted

Diane Heath Beever Memorial Fund (2008) to support programs that address substance abuse and/or mental illness, with a primary focus on prevention
 J. E. Adrien Blais Fund I (1967) unrestricted except that “not more than fifty percent” of the income is to be paid to two named agencies and for research and care for the elderly
 J. E. Adrien Blais Fund II (1967) for the relief, support or assistance of poor or needy Massachusetts residents
 J. E. Adrien Blais Fund III (1967) for the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease

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

- Charles W. Hapgood Trust Fund (1986) 40% of income received for educational purposes at the Massachusetts Institute of Technology or some similar institution, or for the promotion of health and the alleviation of suffering at Massachusetts General Hospital or some similar institution
- Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the homeless
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- Grace L. Holland Fund (2007) To assist in the rehabilitation of handicapped children
- Theodore C. Hollander Trust Fund (1929) income to be used "in part" for hospitals, education and the improvement of American citizenship
- Nathaniel Hooper Fund (1938) unrestricted
- Grace A. Jacobs Fund (1988) unrestricted
- Jacoby Club of Boston Fund (1984) to provide kindly, personal help and concern for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances
- Jamaica Plain Dispensary Fund (1962) for the benefit of poor people in or near Jamaica Plain, particularly for health related needs
- Charles Frederick Joy and Dora Marie Joy Fund (1992) income to be used for summer vacations for two worthy Protestant girls and one boy and any excess income shall be used to help in the care of sick Protestant children or Protestant girls or women
- Kevin Kelly Fund for the Performing Arts (1994) for the Boston Foundation's Arts Initiative
- Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2006) unrestricted
- Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis
- Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye
- Azad & Doris Maranjian Charitable Trust Fund (2009) to be used for organizations committed to maintaining the physical health of the general population as well as targeted populations of the disabled; for cultural and educational enrichment; for those dedicated to preserving and defending the Constitution; and the Azad and Doris Maranjian Humanitarian Award given to any outstanding individual who has demonstrated an ability to further ennoble the human species and the human spirit
- Massachusetts Civic League Fund (1983) to promote sound government
- Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes
- Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women
- Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1954) for aid to needy gentlewomen
- Out of the Blue Grants Fund (2002) for unsolicited and unrestricted Boston Foundation grants made to nonprofits that have outstanding leadership and engage in truly exceptional work
- Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) to be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care
- Norman Everett Pearl Fund (1996) for recognized charities in the Boston area
- Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, nonprofit radio and television stations) providing musical programs
- Permanent Fund for Boston (1980) unrestricted
- Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River
- Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music
- David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Ruth M. Reiss Memorial Fund (1997) unrestricted
- Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea
- Harriet Rogers Fund (1990)
- Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind
- Walter J. & Marjorie B. Salmon Fund (1999) unrestricted
- Louis Agassiz Shaw Fund (1991) for the benefit of underprivileged children
- Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people
- Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs designed to bring about improvements in adoption procedures
- Sophia Snow Fund (1948) for care and support of destitute children of Roxbury
- Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions
- Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women

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

Robert Wadsworth Fund for the Future of Boston (2008)

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

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

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

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

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

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

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

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

SPECIAL INITIATIVE FUNDS

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

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

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

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

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

Arts Capitalization Technical Assistance Fund (2010)

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

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

Boston Opportunity Agenda (2010) for a public/private partnership to ensure that all Boston residents have the support they need to achieve upward educational and economic mobility and secure, satisfying lives

Catalyst Fund for Nonprofits (2009)

CHAMPS Boston (2009)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Success Boston (2008) to increase the college graduation rate for low-income, minority and first generation college students from public schools in Boston

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Designated Funds

Designated Funds have been established by donors to support one or more of their favorite nonprofit organizations.

Through these funds, many nonprofit institutions receive crucial annual support.

The year the fund was established is listed in parentheses.

<p>Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston</p> <p>Lucy Kasparian Aharonian Memorial Scholarship Fund (2007) for scholarship awards to the Armenian International Women's Association, Inc.</p> <p>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</p> <p>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</p> <p>Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Foundation</p> <p>Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals</p> <p>Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs</p> <p>Arts Awareness Fund (2005) to connect visual artists to opportunities to serve our community's social service agencies and other constituencies</p>	<p>Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston</p> <p>Lilian G. Bates Fund (1951) for three named agencies</p> <p>Be the Change Fund (2007)</p> <p>Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts</p> <p>Boston Ballet – E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet</p> <p>Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association</p> <p>Boston Baroque Fund (2003) for general operating support of Boston Baroque</p> <p>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</p> <p>Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.</p> <p>Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings</p> <p>Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College</p>
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- ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation
- BPE/Current Use Fund (1985) for current use project funding
- BPE/Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation
- MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation
- BPE/Public Education Fund (1985) for staff salaries of the Boston Plan for Excellence in the Public Schools
- BPE/Support for Early Educational Development Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation, Inc.
- Herbert Brandshaft Scholarship Fund (2007) to support the Herbert Brandshaft Scholarships at the MATCH School to help deserving students from low-income families pursue a college degree in the fields of mathematics, science, engineering or computer science
- Annie L. Breckenridge Trust Fund (2000) for the benefit of the Massachusetts Society for the Prevention of Cruelty to Animals and the Mary Lane Hospital Association
- Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition
- Charles T. Burke Fund for the Watertown Boys and Girls Club (1994) for the Boys and Girls Club of Watertown, Inc.
- Charles T. Burke Fund for the Watertown Free Public Library (1994) for the Watertown Free Public Library
- Agnes T. Carruth Fund (1983) To the Kind Edward VII Memorial Hospital, to be used in whatever manner the governing body of said hospital shall see fit, but preferably for the care and treatment of persons suffering from asthma
- James F. Casey Fund (1949) for seven named agencies
- Alex Castoldi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students
- Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose
- Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy
- Philip P. Chase Fund (1955) for five named agencies
- Julia Child Fund (1979) for fellowships to support professional study, research, writing and teaching related to food, wine and the culinary disciplines, with preference to those planning to study in France
- Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted
- Cutler Family Education and Animal Welfare Fund (2011) to support the Museum of Science, Cape Ann Animal Shelter and Cold Spring Harbor Laboratory
- English High School Class of 1934 Award Fund (1994) for a scholarship to a Boston English High School student with preference given to students who show marked improvement and particularly those who are succeeding in spite of adverse circumstances
- English High School – John Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School
- Ernest & Vera Clivio Charitable Memorial Fund (1981) for the benefit of two named agencies
- Elizabeth Cook ACF Student Fund (1997) to provide short-term funds to students associated with the Ad Club Foundation
- Almon B. Cook-Relief Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester
- Thomas G. Curtin – Bobby Kargula Nanae Fund (2009) to promote cultural and educational exchange programs to support the sister city relationship between Concord, Massachusetts, U.S.A. and Nanae Town, Hokkaido, Japan
- Dedham Choral Society Endowment Fund (1991) (including the Brian Jones Fund) for the Dedham Choral Society, Inc.
- Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra concert series to young people in the New England area
- Duggan Charity Fund (1998) for Canton High School
- East Boston Social Centers, Inc. Fund (1996) for the East Boston Social Centers, Inc.
- Douglas A. Eaton Memorial Fund (1962) for scholarships to members of the graduating class of Hingham High School
- Michael Eliot Fund for the Arts (1992) To provide scholarships & fellowships for students of the fine arts with preference to those studying in the field of sculpture.
- Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008) to support the Gustavus John Esselen Award for Chemistry in the Public Interest as outlined in the organizational by-laws of the Northeastern Section of the American Chemical Society, Inc.
- Philip M. Fagan Family Fund (1971) for Combined Jewish Philanthropies of Greater Boston
- Paul R. & Jacqueline D. Fehrenbach Family Fund (1999) for Junior Achievement of Eastern Massachusetts
- Benjamin M. Feinberg Fund (1962) for Hebrew College
- Arthur Fiedler Esplanade Concerts Fund (1980) for the support of free concerts on the Esplanade
- Food and Fuel Fund (2008)
- Felix Fox Memorial Fund (1974) for the Community Music Center of Boston
- Americo Francisco Fund, Estate & Realty/Charitable Trusts (1998) for the benefit of thirty named charities
- Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy
- John & Ethel Goldberg Fund I (1984) for the benefit of Brandeis University and West End House, Inc.
- John & Ethel Goldberg Fund IV (1984) for support of eye retina research and related eye research technology
- John & Ethel Goldberg Fund V (1984) for the continuing professional education of Massachusetts judges in subjects directly pertinent to the performance of their judicial and administrative duties

- John & Ethel Goldberg Fund VI (1984) for Suffolk University Law School for the “needs of the law school with respect to scholarship and maintenance or renovations to the buildings housing the law school”
- Barbara W. & Frank B. Gopen Fund (1978) for the benefit of Massachusetts General Hospital and the Arthritis Foundation
- Walter W. Gove Fund (1972) for two named agencies
- Elizabeth Grant Fund (1980) for five named agencies
- Greatrex Scholarship Fund (1988) for scholarship awards to Foxborough Massachusetts students who are in need of financial aid to attend college, trade school or nursing hospital
- Rosario Fajardo Hagan Fund (1991) for the Life Experience School
- John H. Hagopian Fund (2005)
- Patricia Jellinek 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 (\$30,000 per year until the fund is depleted)
- James W. & Margaret A. Ingraham Charitable Fund (1992) for the benefit of five named agencies
- Ella Jackson Artists and Scholars Fund (1982) for the Truro Center for the Arts on Castle Hill
- Patrick F. Jones, Jr. Endowment Fund (1981) for the benefit of the Lena Park Community Development Project
- Donaldson F. Jones Fund (1999) for the benefit of Massachusetts General Hospital / The Claude E. Welch Surgical Research and Education Fund
- William & Sean Kelley Scholarship Fund (2010)
- John F. Kennedy Library Foundation Endowment Fund (1984) for support of the John F. Kennedy Library Foundation
- Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School
- Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA
- Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society
- Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)
- Gerald V. Levreault & Claire H. Levreault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England
- Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine
- Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation
- Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts
- John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution
- Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency. Currently the program is the “Short Stop” of Somerville, MA
- Harry D. Neary Fund (1950) for five named agencies
- Neighborhood Development Support Collaborative Fund (1987) for Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations
- New England Aquarium Education Fund (1983) (Robert G. Stone Fund, Paul F. Hellmuth Fund, Helen B. Spaulding Fund, and the William S. Brewster Fund) to support educational programs at the New England Aquarium
- New England Women’s Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women’s Club Memorial Lecture Series, devoted to the discussion and study of women’s history in Boston
- Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science’s Internship Program
- Nixon Peabody Scholarship Fund in Recognition of Retired Managing Partners (1997) for scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs
- Oak Foundation – Home Funders Fund (2007)
- Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school
- Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts
- Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library
- William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning
- Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center’s Scholarship Program
- Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post secondary vocational education
- Charles & Cornelia Pfaff Fund (1964) for four named hospitals

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Wallace Foundation Fund (2006)

Inez Washabaugh Ward, PNP, Scholarship Fund (2011) to provide grants to the Summer Fund at Associated Grantmakers (or its successor or suitable alternative agencies) for the purpose of supporting camp scholarships for boys and girls, especially patients of the South End Community Health Center where Ms. Ward was the Pediatric Nurse Practitioner for thirty-four years

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

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

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

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

Stetson Whitcher Fund (1986) to benefit eight named agencies

Ernesto "Tito" Whittington Scholarship Fund (2007)

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

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

Donor Advised Funds

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

63 Marlborough Street Fund (1984)	Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)	C & K Foundation Fund (2000)
A & E Educational Quest Fund (2004)	Balzer/Bellinger Fund (2007)	Norman L. Cahners Fund (1984)
AADS Memorial Fund (2004)	John & Judith Barber Fund (2002)	Campbell Foundation Fund (2003)
Walter and Alice Abrams Family Fund (2005)	Richard Allan Barry Fund (2002)	A. Bruce Campbell Fund (2002)
Maida & George Abrams Fund (1985)	Baudanza Family Fund (1997)	Erin K. Campbell Fund (2002)
Abromowitz/Ruttenberg Family Fund (2000)	Baupost Group Charitable Fund (2004)	C. Alec and Sarah O' H. Casey Charitable Fund (1993)
Acacia Fund (2004)	Beachcomber Fund (2008)	Margaret W. Casey Fund (1986)
Ad Club Foundation Fund (1987)	Belinda Fund (2011)	Alice F. Casey Fund (2006)
Adler Family Fund (2006)	Bellevue Fund (1999)	Ellen W. Casey Fund (1993)
Adlib Foundation (2010)	William D. & Mary E. Benjes Fund (1984)	Champa Charitable Foundation Fund (2003)
Adopt-A-Statue Endowment Fund (1988)	Jane Bernstein Fund (2006)	Charlestown Fund (2008)
Affinity Services Corporation Fund (2003)	Best Doctors Charitable Foundation (2010)	Charlestown Poor's Fund (2010)
Richard and Kimberlee Alemian Fund (1996)	Charlotte Saltonstall Bigham Memorial Fund (2004)	Chasin/Gilden Family Fund (2000)
James F. Alenson Memorial Fund (2007)	Bird Fund (1999)	Charles Ezekiel and Jane Garfield Cheever Fund I (2006)
Aley Fund (2009)	Bitpipe Legacy Fund (2004)	Charles Ezekiel and Jane Garfield Cheever Fund II (2006)
Aliad Fund (1993)	Linda Cabot Black Fund (1983)	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
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)	NICSA/William T. Blackwell Scholarship Fund (1995)	Joyce Chen and Helen Chen Foundation Fund (1995)
Rosamond W. Allen Charitable Fund (2004)	Emmanuel and Jane Blitz Fund (1992)	Chertavian Family Fund (2005)
Dwight & Stella Allison Fund (1982)	Tom and Lisa Blumenthal Family Foundation (2005)	Chevron Fund (1980)
Alper Family Fund (1995)	Joan T. Bok Fund (1997)	Christ on Earth Fund (1989)
Ames Foundation Charitable Fund (2009)	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	Michael W. Christian Memorial Fund (1986)
George and Nedda Anders Fund (1991)	Boston Foundation Employee Matching Gifts Fund (2007)	Dr. & Mrs. B.U. Chung Fund (1999)
Carol and Howard Anderson Family Fund (1997)	BPE/Bank of Boston 200th Anniversary Fund (1982)	Chung Family Fund (1999)
Barbara Jane Anderson Fund (2000)	Braverman Family Fund (1992)	Churchill Family Fund (1997)
Selma and Bayness Andrews Fund (2006)	Bronner Charitable Foundation (2006)	Circle Fund (1997) priority given to organizations which support grassroots organizing for social change
Michael & Ellen Angino Fund (1997)	Brooke Family Donor Advised Fund (2007)	Civic Engagement Fund (2010)
Anony Fund (1998)	Peter A. Brooke Fund (1998)	CJE Foundation Fund (2007)
Ansara Family Fund (2006)	Peter W. and Ruth H. Brooke Fund (2004)	Clark Family Fund (2010)
Anthropologists' Fund for Urgent Anthropological Research (1996)	Buckman Fund (2010)	Clarke Fund (1987)
Jim Apteker Fund (2006)	Dean Bullock Family Fund (1997)	Cohen/Lucas Fund (1999)
Arba Lifnot Boker Fund (1992)	Denise A. Burgess Fund (2002)	Coit Family Fund A (2001)
Armony Erel Charitable Fund (2008)	Bill and Barbara Burgess Fund (2002)	Colby Charitable Fund (1980)
Atalaya Fund (2004)	William T. Burgin Fund (2001)	Colony Road Fund (1997)
Atlantic Fund (1997)	John A. Butler Memorial Fund (1988)	Commonwealth Rinks Fund (1991)
Ausschnitt Fund (2004)	Kairos Butler Fund (1994)	Condor Street Fund (1988)
Kathryn and Charles Avison – Miriam Avison Charitable Fund (2005)	Butler's Hole Fund (1994)	
Katharine & George Baker Fund (1987)		

Joette & John Cook Fund (1986)
 Constance and Lewis Counts Fund (1990)
 Coolidge Family Fund (1982)
 Cooper Leeser Family Fund (1997)
 William & Susan Copeland Fund (1990)
 Corvelli Fund (1996)
 Demetrios G. C. & Kimberly A. Coupounas Fund (1996)
 George D. & Angelyn K. Coupounas Fund (1994)
 Jessie B. Cox CLT – Cox Family Fund (2009)
 Jessie B. Cox Charitable Trust Fund (2008)
 Cregan Charitable Fund (2005)
 Crosby Family Fund (2000)
 Kate Crozier Fund (2007)
 Tarrant and Laura Cutler Charitable Gift Fund (2008)
 Dainger Fund (1997)
 Darling Family Fund (1983)
 John Da Silva Memorial Fund (1988)
 John H. Deknatel Family Fund (2009)
 W. Deknatel Charitable Fund (2009)
 Sarah Derby and Gary MacDonald (2007)
 Marshall and Laura Derby Charitable Fund (2007)
 Rebecca Derby and Evan Morton (2007)
 DeWolfe Family Fund (2000)
 Larry DiCara Fund (2006)
 Dillon Fund (2004)
 Dintersmith-Hazard Foundation Fund (2006)
 Diversity Training Fund (2010)
 Dodson Family Charitable Fund (2007)
 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)
 Eagle Bank-Frank E. Woodward Scholarship Fund (1985) for scholarships for Everett residents
 Margaret Eagle Foundation Fund (2000)
 Echo Rock Fund (2000)
 Egozy Fund (2006)
 Eisenson Family Fund (2005)
 Ellis Family Fund (2003)
 Employment Retention Fund (2004)
 Endowment for Children in Crisis (1991)
 Gerald Entine Family Trust Fund (2008)
 EqualLogic Foundation Fund (2008)
 Ethics Trust Fund (1993)
 Evans Family Fund (1999)
 Norris & Constance Evans Charitable Fund (1999)
 Excalibur Fund (1999)
 Peter and Ellen Fallon Fund (1997)
 FARM Fund (2006)
 Carol Fazio Charitable Fund (2010)
 Robert L. Feinberg Fund (2007)
 Martin & Kathleen Feldstein Fund (1986)
 Ferdinand Fund (2000)
 First Principle Fund (2006)
 Fisher Family Fund (2000)
 Fishreys Family Philanthropic Fund (1999)
 Jack Florey Fund (2004)
 Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families
 Free for All Concert Fund (2011)
 Niki & Alan Friedberg Fund (1986)
 Orrie M. Friedman Charitable Fund (1995)
 David Frisbie Family Charitable Fund (2010)
 FUEL Accounts Fund (2009)
 Fulkerson Family Fund (1998)
 Davis R. Fulkerson Fund (1999)
 Lyle W. Fulkerson Fund (1999)
 Sarah Fulkerson and Robert Le Roy Family Fund (1999)
 Fuller Trust, Inc. Fund (2009)
 Fulton Family Fund (2006)
 Future Fund (2006)
 Gabrieli Family Fund (1997)
 Gaffney/Kames Foundation Fund (1997)
 Galilean Fund (2008)
 Ganesh Fund (2001)
 Gannon Family Charitable Fund (2003)
 Gannon Family S.U.N. Fund (2010)
 John Lowell Gardner Fund (1986)
 Dave Garroway Fund (1982)
 Garuda Fund (2007)
 Brad Gatlin Family Fund (1995)
 Gaudette Family Fund (2000)
 Gergen Family Fund (2009)
 Congressman Gerry E. Studds Fund (2006)
 Carl J. Gilbert Fund (1984)
 Gilbert Fund (2007)
 Ginsberg/Kaplan Fund (2011)
 Glassman Family Fund (1985)
 John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine
 Carol R. & Avram J. Goldberg Fund (1983)
 Golden Family Fund (2000)
 Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
 Goodworks Fund (2002)
 Gordon Educational Fund (2001)
 Sandra & Philip Gordon Family Foundation Fund (2001)
 Laurie Gould and Stephen Ansolabehere Fund (2009)
 Gravelley Springs Fund (2005)
 Green Fund (2011)
 Patricia H. Gross Fund (1999)
 Grunebaum Charitable Fund (2006)
 Gualala Fund (1991)
 Guenzel-Pieters Family Fund (2008)
 Charles & Dorothy Gullickson Fund for Social Change (1998)
 Mary Haas and Ronald Leavitt Donor Advised Fund (2001)
 Jay Habegger and Christine Nagle Fund (2004)
 Ken and Becky Hansberry Fund (2001)
 George Harrington Trust Fund (1983)
 Charlotte C. Hart Family Fund (2001)
 J. Allan Hauter Memorial Fund (2004)
 James E. Hayden Charitable Fund (2001)
 Hebb Charitable Fund (2003)
 HEIRS Fund (1996)
 Helies Family Fund (2000)
 Elizabeth D. Heller Fund (1987)
 Henderson Fund (1996)
 Fred Henning Fund (1989)
 Henry Fund (1986)
 E. Byron Hensley Jr. Charitable Fund (1993)
 John P. Herrick Fund (2009)
 William H. and Jodi A. Hess Charitable Fund (2005)
 Hewitt Family Charitable Trust Fund (1993)
 Ann S. Higgins Charitable Remainder Unitrust (Unrestricted) (2010)
 Ann S. Higgins Fund (2001)
 Lucius T. Hill III and Wendy Y. Hill Fund (2000)
 Petie Hilsinger Fund (1999)
 Marc Hirschmann Foundation Fund (2002)
 Hoffman Fund (1986)
 Robert L. Hogue Fund (1981)
 Holberger Family Fund (1993)
 Holland Family Fund (1993)

Holtzman Fund (2009)
 Gilbert H. Hood Family Fund (1980)
 Gilbert H. Hood Jr. Charitable Lead Trust Fund (1980)
 Robert Hooper Family Fund (2004)
 Hourless Fund (1997)
 Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham
 Hoyt Family Fund (2000)
 Hunt Fund for Children (2001)
 Interstitial Fund (2009)
 Investing in the Future Fund (2000)
 Iron Mountain Education Fund (2004)
 J. Jill Compassion Fund (2002)
 Mitchell & Diane Jacobs Fund (1998)
 Jade Fund (2007)
 JAHELBE Fund (2002)
 Japanese Disaster Relief Fund (2011)
 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)
 Louis and Marcia Kamensky Donor Advised Fund (2010)
 Beton M. Kaneb Fund (1983)
 Albert J. & Diane E. Kaneb Family Fund II (1997)
 Patricia A. Kaneb Fund (2003)
 Martin & Wendy Kaplan Fund (2006)
 Steven E. Karol Charitable Foundation (1999)
 Kassler Family Fund (2000)
 Elizabeth and Paul Kastner Foundation Fund (2008)
 Stephen and Caroline Kaufer Charitable Giving Fund (2004)
 Kaye Charitable Fund (2003)
 John & Anne-Marie Keane Foundation Fund (1997)
 Kearney Family Fund (1995)
 Keewaydin Fund (2001)
 Sabina F. Kelly Catholic Charitable Fund (1991)
 Kensington Capital Children's Fund (2002)
 Keogh Family Fund (2000)
 Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
 Kidder Smith Fund (2003)

M. R. Kidder Charitable Fund (2004)
 John Thomas Kittredge and Charles R. Morehead Fund (2011)
 KJN Family Fund (1997)
 Kluchman Family Fund (1997)
 Allen and Elizabeth Kluchman Fund (1997)
 Klureza Family Fund (1997)
 Pamela Kohlberg Fund (1995)
 Stephen P. Koster Fund (1985)
 Joseph and Lisa Krivickas Family Fund (2006)
 Gregory and Deborah Laham Family Charitable Fund (2011)
 Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)
 Lawrence Family Fund (2009)
 Barbara Lee Family Foundation Fund (2004)
 Roger & Clarissa Lee Family Fund (2009)
 Thomas E. & Barbara B. Leggat Fund (1986)
 C. Martin Leinwand Fund (1986)
 Colman & Carol Levin Fund (2000)
 Levine Family Charitable Fund (2003)
 Levitt Family Fund (2000)
 Lewis Family Fund (2007)
 Annie Mae Lewis Fund (2011)
 Charlotte Ruth Lewis Fund (1998)
 Henry R. Lewis Family Fund (2007)
 Southard Lippincott Fund (1996)
 Lissy Family Fund (2008)
 John S. Llewellyn, Jr. Community Assistance Fund (1996)
 LMG Fund (1997)
 Marjorie L. and James M. Lober Fund (2010)
 LOC Fund (2009)
 Joan Locatelli Foley Memorial Fund A (1997)
 Joan Locatelli Foley Memorial Fund D (1997)
 GC & JW Lodge Fund (2000)
 Loomis Sayles Charitable Fund (2007)
 Lord-Buck Fund (1996)
 LPL Financial Charitable Fund (2009)
 Bruce Lunder Fund (1982)
 John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
 Donald J. & S. Kelley MacDonald Charitable Fund (1998)
 Magic Penny Fund (1997)
 Mann Family Fund (2010)
 Margaret Hixon Fund (2007)

William G. Markos Fund (1982)
 Evelyn A. Marran Fund (1983)
 Martin Fund (1998)
 Mason-Brown Fund (2008)
 Sydell and Edward I. Masterman Fund (1997)
 Match School Scholarship Fund (2007) for Match School scholarships
 Mayel Fund (1982)
 William and Linda McCabe Fund (1994)
 Richard & Judith McGinnis Fund (1999)
 Eleanor P. McIntyre Fund (2001)
 McNeill Family Fund (1997)
 McSweeney Family Charitable Fund (2009)
 Medical Research Fund (1992) to support medical research in the fields of endocrinology and/or nuclear medicine
 Emily & Bernard H. Mehlman Fund (2002)
 Mellowes Fund (1998)
 Leila Yassa & David Mendels Fund (2000)
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)
 Meyer Foundation (2006)
 Allan Meyers Fund for the Advancement of Careers in Disability (2000)
 Michon Family Fund (1986)
 Microsoft Unlimited Potential Fund (2005)
 Mid-Century Fund (2004)
 J. F. Middleton Family Fund (1995)
 Mill River Foundation Fund (2004)
 Gabrielle J. Miller Donor Advised Fund (2004)
 Anita L. Mishler Education Fund (1983)
 Moccasin Brook (2000)
 Molino Family Fund (2003)
 Monadnock Fund (2002)
 Moose and Squirrel Fund (2006)
 Mormann Family Fund (2006)
 Robert S. Morris Advised Fund (2000)
 Muddy Pond Trust Fund (1994)
 David G. Mugar Fund (1998)
 Munger Family Fund (2001)
 Murchison/Silvia Charitable Gift Fund (2009)
 Mystic Harmony Fund (2000)
 Paul F. Nagle Memorial Fund (2006)
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
 Tami E. Nason & Kent A. Lage Fund (2005)
 Jean F. and David G. Nathan Fund (1986)
 New Beginnings/Kidder Fund (2004)

Next Door Fund (2005)

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)

Dupre-Nunnally Charitable Gift Fund (2007)

O'Brien Family Fund (2006)

Ones Fund (2004)

Richard T. O'Rourke Fund (1988)

Orpheus Fund (2002)

Morgan Palmer Charitable Fund (1982)

John J. Pappenheimer Fund (1995)

Parker Family Fund (2000)

Field Parker Fund (1996)

Partnership Fund in honor of Anna Faith Jones (2001)

Payne's Creek Fund (2001)

Payson Family Fund (2000)

Perkins Grant Fund (1996)

Samuel Perkins and Nancy Reed Fund (1996)

Sheila and Sara Perkins Fund (1996)

Perkins Improvements Fund – William (1996)

John & Lydia Perkins Fund (1999)

Robert C. Perkins Fund (2000)

Thomas Perls Fund (2004)

Permanent Housing Fund (1989)

Roger Perry Memorial Fund (1999)

Peter Fund (2000)

Petersen Family Fund (2001)

Kevin Phelan Fund (2004)

Philancon Fund (1990)

Katherine A. & Fannie Phillips Fund (1997)

Picard Family Fund (2000)

Jamie Pierce & Rick Cresswell Fund (2002)

Plimpton – Shattuck Fund (2005)

Stephen and Sharon Plumeri Fund (1994)

Poler Family Charitable Gift Fund (2008)

Pool Family Fund (1997)

Poss-Kapor Family Fund (1996)

Pride in Scholarship Fund (1992) for scholarships to students whose academic work & individual contributions to the arts, sciences or business best serve & promote the gay & lesbian community

Fred & Ruthann Prifty Fund (2001)

Thomas & Mary Prince Family Fund (2000)

Project Shelter Pro-Am Fund (1991)

Sue and Bernie Pucker Fund (2002)

Donald and Frances Putnoi Charitable Fund (2006)

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

Quid Nunc Fund (2001)

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

Barbara & Yale Rabin Fund (2002)

Radtke Family Fund (1996)

Richard E. & Mary F. Rafferty Fund (2006)

Otto W. Ramstad Fund (1998)

Bessye Bedrick Ravelson Fund (2003)

Gene Record Fund (2002)

Sara Delano Redmond Fund (1996)

Remmer-Fox Family Fund (1995)

Reno Family Charitable Foundation (1998)

Edward S. Reynolds Memorial Fund (1984)

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

Rosen Family Fund (2008)

Lindsey A. Rosen Fund (2011)

Daniel and Brooke Roth Charitable Gift Fund (2007)

Rotman-Attardo Family Fund (2005)

Dr. Jordan S. Ruboy Charitable Fund (1998)

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

Robert Sachs & Caroline Taggart Gift Fund (1998)

Salmon Family Charitable Fund (2006)

David Salten Fund (2007)

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

Kazanjian Sargeant Fund (1996)

Schawbel Family Fund (1995)

Margaret M. Schmidt and Kenneth J. Danila Fund (2004)

Schott Fund (1999)

Schumann Family Fund (2005)

Schwinn Family Charitable Foundation (2011)

Charles S. and Zena A. Scimeca Charitable Fund (2004)

Stephen Sears and John Lavryssen Fund (2009)

September Fund (2000)

Norman and Maryellen Sullivan Shachoy Fund (1997)

Shames/Egasti Fund (1991)

Shapiro/Fleishman Fund (1999)

Douglas Boyd Sharpe Donor Advised Fund (2006)

Shawkemo Fund (2000)

K.A. and P.R. Sherbrooke Family Fund (2007)

Sherman Family Foundation Fund (2005)

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

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

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

Shields Family Fund (2006)

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

Shoe Box Foundation Fund (2004)

Jean Karpas Siegel Fund (1994)

John and Susan Simon Boston Foundation Fund (2007)

Ellen L. Simons Fund (1997)

Sixty-Nine Roses Charitable Foundation (2011)

Fay Slover Fund (2010)

Skylight Fund (2000)

Ellin Smalley Fund (1987)

Smith Family Charitable Fund (2004)

Austin & Susan Smith Fund (1999)

Timothy Smith Fund (1995)

Julian & Anita Smith Fund (1981)

J. Alper Smith Fund (1996)

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

Nancy and George Soule Family Fund (1997)

Sparky Foundation Fund (2003)
 Spector Fund (2001)
 Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund (2007)
 Scott E. Squillace & Shawn M. Hartman Donor Advised Fund (2008)
 David F. Squire Family Fund (1997)
 Staufenbiel Aley Fund (2009)
 Harvey & Shirley Stein Fund (1999)
 Stewart Fund (2006)
 Tracy Stewart Fund (2009)
 Stone Charitable Fund (1999)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 James M. and Cathleen D. Stone Foundation (1995)
 Stonehill Enrichment Fund of the Ames Free Library (1994)
 Robert Strange Family Fund (2003)
 Charles Sugnet Fund (1998)
 Joshua Sugnet Fund (1998)
 Suhrbier Family Fund (2005)
 Nancy L. Sullivan Fund (1989)
 Diane Sullivan-Villano Fund (1998)
 Sunrise Fund (1993)
 Sykes Moyer Fund (2005)
 Sylvan Fund (1985)
 Davis & John I. Taylor Trust Fund (1983)
 TechFoundation Fund (2002)
 Tempero Family Fund (2002)
 Marc C. Thompson Family Fund (2008)
 Thomsen Family Fund (2000)
 Susan and Michael Thonis Fund (2005)
 Thorvale Fund (2007)
 Scott and Jennifer Tobin Charitable Fund (2004)
 Topol Family Fund (1991)

Norman E. & Sandra Curry Toy Fund (1985)
 Trefler Fund (1997)
 Tye Charitable Fund (2006)
 Unity Foundation Fund (1995) for funding of nonprofit organizations serving the African-American community
 Lisa and Bill Vanderweil Charitable Fund (2010)
 Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter
 Nancy J. Vickers Fund (2006)
 Vizzini Fund (1997)
 M. Volpe Kluchman Fund (2005)
 Ann & Robert von der Lippe Fund (1997)
 JH & EV Wade Fund (1990)
 James and Margaret Wade Fund (1997)
 Wainwright Bank Community Fund (1998)
 S & D Walden Charitable Fund (1986)
 Walker Fund (1998)
 Walsh Brothers Foundation (2010)
 Ruth & Henry Walter Fund I (2010)
 Ruth & Henry Walter Fund II (2010)
 Ruth & Henry Walter Fund III (2010)
 Ruth & Henry Walter Fund IV (2010)
 J. H. Walton Family Fund (1986)
 Max Warburg Fund (1992)
 John William Ward Fund (1987)
 Warner Charitable Gift Fund (2000)
 Joseph D. Warren Fund (2010)
 Wasserman Fund (Terminated Fund) (1986)
 Waterfield Fund (2002)
 Mimi Chandler Watt Fund (2008)
 Weiss Charitable Fund (2004)

Wellesley Hills Congregational Church Outreach Fund (2007)
 Janet White Memorial Scholarship Fund (2004)
 Whitehead – Sayare Fund (2008)
 Whittier Family Charitable Fund (2005)
 Guy and Maggie Wickwire Fund (1989)
 Benjamin J. Williams, Jr. Fund (1986)
 Hope A. Williams Fund (1986)
 Natica R. Williams Fund (1986)
 Ralph B. & Margaret C. Williams Fund (1985)
 Ralph B. Williams, II Fund (1986)
 Winkler Family Foundation Fund (2001)
 Owen Thomas Winship Fund (1998)
 Samuel Lee Winship Fund (1998)
 Wesley L. Winship Fund (1998)
 Jesse Winship-Freyer Fund (1998)
 Winsor Foundation Fund (1989)
 Jack & Judith Wittenberg Fund (1997)
 William W. Wolbach Fund (1986)
 Howard L. Wolf Memorial Fund (1981)
 Women’s Fund (1982)
 Karin E. Wood Fund (1993)
 Michael N. Wood Fund (1996)
 Fund for World Class Schools (2007)
 Wyett Family Fund (1988)
 Zabin Charitable Fund (2001)
 Sylvia and Robert Zell Fund (1988)
 Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals
 T. Zouikin Charitable Fund (2003)
 Zug Family Fund (2008)

Support Organizations and Other Special Funds

Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the communities of Harvard, Ayer, Groton, Pepperell, Shirley and Townsend

Deshpande Foundation (2007)
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 James M. and Cathleen D. Stone Foundation (1994)

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Dedicated to the Memory of Myra Kraft

This 2011 annual report is dedicated to the memory of Myra Kraft, beloved and valued member of the Boston Foundation's Board of Directors.

Her wisdom and spirit helped to guide the Boston Foundation during her lifetime and will inspire all of its work going forward.



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