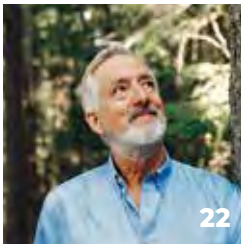


The Boston Foundation
2024
ANNUAL REPORT



**Powering a
Culture of
Philanthropy**

Contents



Welcome from the Chair of Our Board..... 2

Our Year from Our President and CEO 3

POWERING A CULTURE OF PHILANTHROPY

A Legacy for Boston's LGBTQ Community..... 6

The Pryde..... 8

Housing as a Health Care Issue..... 10

The Brigham Housing Program 12

Building Strong Sustainable Grassroots Movements..... 14

The City School 16

The Best Possible Start in Life..... 18

Strategies for Children 20

Impact Investing and Climate Justice 22

Sunwealth 24

Our Funds

About Boston Foundation Funds..... 26

Supporting the Annual Fund for Civic Leadership 28

The Annual Fund for Civic Leadership 30

The Fund for Boston's Future 34

Our Equity Funds..... 37

Our Legacy Societies 38

Supporting Donor-Driven Philanthropy

Professional Advisors Committee and Network 40

Becoming a Donor..... 41

Supporting Our Nonprofit Partners 42

2024 Financial Overview..... 43

Board of Directors 46

Boston Foundation Staff..... 47

Welcome

From the Chair of Our Board



The Boston Foundation's goal is to partner with philanthropists from all walks of Boston life to accomplish their social impact goals and make our city, and its surroundings, truly the best place to live and work. Boston has many great strengths, yet we still see so many opportunities to lift up all our residents to realize their full potential.

This year's Boston Foundation annual report tells some remarkable and moving stories about our donors and the inventive and very personal ways in which they partner with the nonprofit organizations and causes they support.

Many of our donors conduct their philanthropy through a Donor Advised Fund (DAF) at TBF, making grants to the nonprofit organizations they believe have the greatest impact. With TBF's full-time team of investment managers and change-makers deeply embedded in Boston's communities, our DAF holders can accomplish their philanthropic goals without the challenges of managing a private foundation. Some take advantage of our impact investing opportunities to stretch their philanthropic resources and achieve very specific outcome goals.

Others choose to leave a bequest to TBF's endowment, the Fund for Boston's Future, knowing their contribution will benefit the Greater Boston community in perpetuity. And hundreds of individuals, families and companies contribute to our Annual Fund for Civic Leadership, which supports TBF's important research, convenings and policy work.

Our donors engage with us in all of these ways and more. We are honored by their trust and their highly valued partnership. And, while this report celebrates the work of the past year, we are excited by new partner initiatives and opportunities for growth in the coming year. We thank you for making the decision to partner with us on your goals at the Boston Foundation!

A handwritten signature in blue ink, which appears to read "Dwight Poler". The signature is fluid and cursive, with a long horizontal stroke at the end.

Dwight Poler
Chair, Board of Directors

Our Year

From Our President and CEO



At the Boston Foundation, we believe that when we advance equity and close the gaps of our city's disparities, we not only improve lives, we strengthen entire communities. Simply put, when we move equity, we move Boston.

The systemic inequities at the core of these disparities cannot be dismantled without extraordinary perseverance and collaboration among a number of visionary and courageous partners. These include our donors, such as those profiled in this report, our many nonprofit partners, researchers who contributed to some of our reports, those who served as panelists for our forums, Governor Maura Healey and a number of farsighted legislators.

This was a record-breaking year for our civic leadership work, with passage of legislation informed and supported by TBF. Bills signed into law by Governor Healey included a landmark advocacy effort led by TBF to advance wage equity, breakthroughs in maternal health, and the largest housing bond bill in Massachusetts history.

This was also the first full year guided by our four pathways: Child Well-Being; Economic Opportunity; Community Leadership; and Community Wealth.

Together with our many close partners, we are helping to build a stronger, greater Boston.

A handwritten signature in blue ink that reads "M. Lee Pelton". The signature is fluid and cursive, with the first name "M. Lee" and the last name "Pelton" clearly distinguishable.

M. Lee Pelton
President and CEO



“We can make big things happen—and we have.”

— Phil Giudice

Powering a Culture of Philanthropy

A woman who believes housing is a human right helps a doctor save an entire family from joining the ranks of the homeless.

A retired wealth adviser leaves a bequest to strengthen Boston's LGBTQ community for years to come.

An expert in climate justice uses impact investing to support the transition to clean energy and greener homes, particularly in low-income communities.

These are just a few of the donors profiled in this Annual Report. Each of them followed a very personal and unique path to their philanthropy. All of them chose to partner with TBF to strengthen the impact of their giving.

We hope you find their journeys and their stories as inspiring as we do.

A Legacy for Boston's LGBTQ Community

“...while some things have improved, there's still a great deal of progress to be made.”

—Charlie Walsh

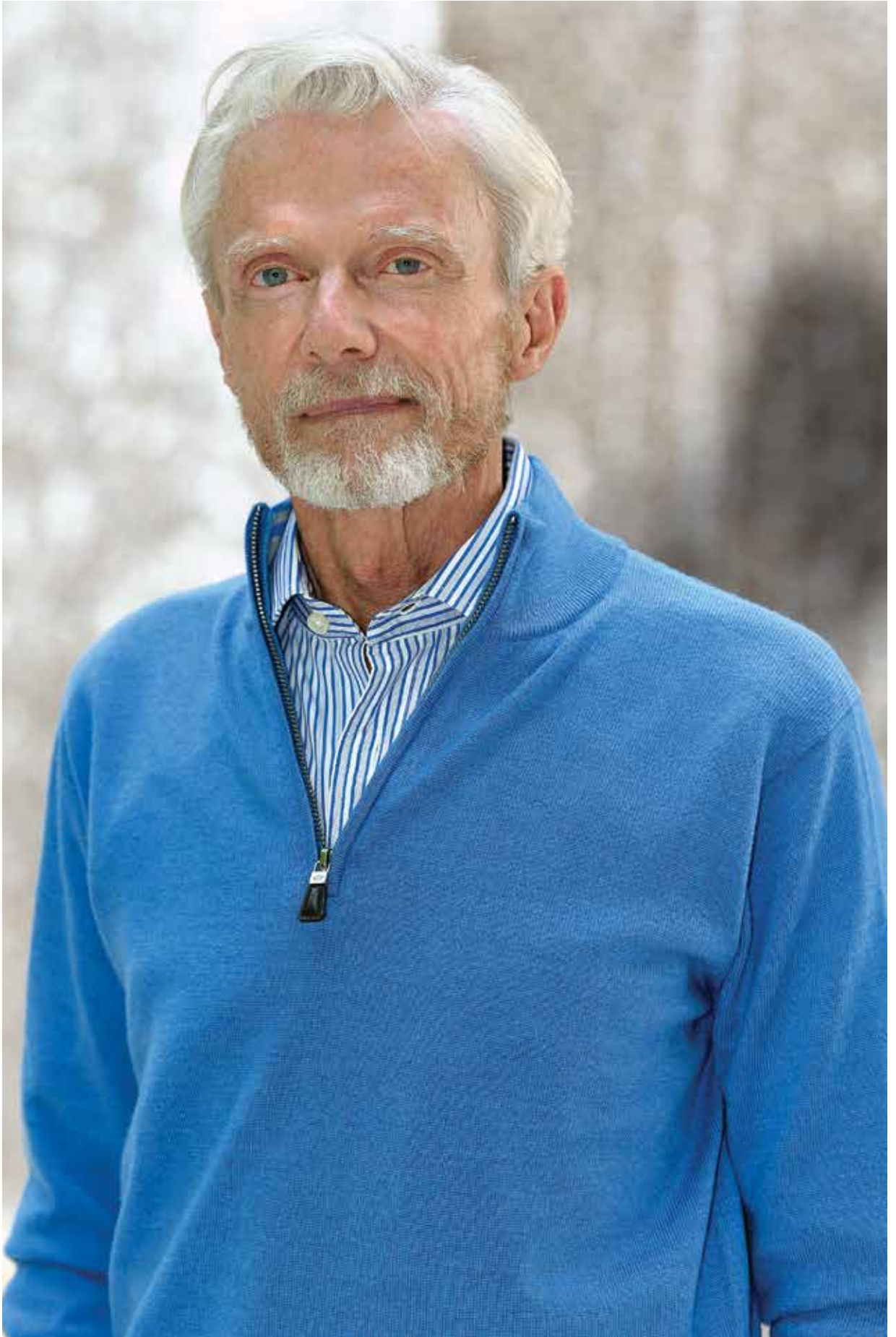
CHARLIE WALSH should write a book about his life. He has traveled and worked around the world—recently returning from a humanitarian trip to Ukraine. And he has been a wealth advisor to a diverse and remarkable roster of families and individuals, including some well-known athletes.

His first involvement with the Boston Foundation was as a member of our Professional Advisors Committee, which advocates for the importance of charitable planning. In 2014, he was asked to serve on the Advisory Committee of the Equality Fund at TBF. The Equality Fund was founded in 2012 to make grants to the most innovative nonprofits serving the diverse members of the LGBTQ community. It is also building a permanent endowment to benefit that community forever.

“Today, the world is more accepting of the LGBTQ community than it was when I was young,” says Charlie, who is leaving a legacy to the Equality Fund. “That was a time when you had to live two different lives. But, while some things have improved, there's still a great deal of progress to be made. The trans community is facing such serious obstacles that some younger members feel the only way forward is to end their life.”

He is also concerned about the quality of life for LGBTQ seniors—and particularly inspired by Boston's first LGBTQ-friendly senior housing complex called The Pryde, which received a recent grant from the Equality Fund.

Legacy donor Charlie Walsh is leaving a bequest to the Equality Fund's endowment.







THE PRYDE, which opened this summer, exemplifies the power and the potential of true community-based development. A project of LGBTQ Senior Housing, Inc., it's a masterful restoration of the massive Rogers Middle School in Hyde Park, offering 74 apartments, a large community center, a performance space, a library and a landscaped garden—as well as amenities all seniors need. And there is art from local Hyde Park artists lining its common spaces.

Gretchen Van Ness, Executive Director of LGBTQ Senior Housing, points out that many LGBTQ seniors yearn to find a home where they can be themselves without facing discrimination or harassment.

“This is the generation of Boston’s LGBTQ community members who lost friends and family to AIDS and fought for the rights and liberties we have now,” says Van Ness. “We stand on their shoulders and we owe them so much—especially basic dignity.”



Tom went from the sensory deprivation of living in a basement studio with no light to an apartment at The Pryde with a skylight and plenty of room for his popular dog, Buddy.

Opposite page: Faces of some of The Pryde’s first tenants at a Friday coffee hour

Housing as a Health Care Issue

ANNE BROMER joined the Boston Foundation's community of donors five years ago when she opened a Donor Advised Fund. "In every way it's been a plus for me," she says, "but especially it's helped me to focus my philanthropy." With a strong background in affordable housing, today Anne supports programs that provide permanent housing. "After food, there is nothing more important than having a safe and secure place to sleep."

Her support has meant helping Boston Neighborhood Community Land Trust save two buildings for affordable housing. And, as a reflection of Anne's deep commitment to the Women's Lunch Place, helping to develop permanent housing for the homeless women served by that nonprofit.

Recently, Anne has been working with her own primary care physician, Dr. MaryCatherine Arbour, MD, MPH, at Brigham and Women's Hospital on emergency housing for patients.

It began with a conversation between the two women about the hospital's Housing Program, which works with patients to be sure they have safe housing when they leave the hospital. Anne thought it was a great idea.



Anne Bromer

With a strong background in affordable housing, Anne Bromer supports programs that provide permanent housing.



From left: Bricenia Cruz, Housing Advocate; Bridget Faison, Housing Supervisor; MaryCatherine Arbour, Medical Director of the Brigham Social Care Team; Ana Gonzalez, Housing Advocate

“Safe and secure housing is crucial to a patient’s health.”

— Anne Bromer

THE BRIGHAM HOUSING PROGRAM already had been working with a patient who was about to be evicted from her current housing. Then the patient had a serious stroke and the emergency became a matter of survival.

“The Housing Program has a partnership with Harvard Legal Services Center,” explains Dr. Arbour, “and we were able to get a lawyer to go to court and file a motion to stay the execution of eviction.”

In a letter to Anne, Dr. Arbour wrote, “Your donation prevented five people—three adults and two children—from losing the roof over their heads tomorrow. It also bought the patient time to continue recovering from her stroke and to problem-solve her housing crisis with support from our team.

“Lastly, your donation made my team feel efficacious and hopeful. I know that’s not why you do this, but it makes a world of difference to activate the program we built, then bridge the gap with this emergency fund to make this kind of difference in one day. You have my heartfelt gratitude.”

Not one to rest on her laurels, Anne says, “All hospitals should have a program like this. Safe and secure housing is crucial to a patient’s health.”

Building Strong, Sustainable Grassroots Movements

DAVE JENKINS is a young donor who has been dedicated to building community from the ground up since he volunteered for nonprofit organizations in high school and college. “Over the years, I had built relationships with people and communities experiencing injustice,” he explains. “I decided that the best contribution I could make was to partner with people directly impacted by systemic inequities and build movements for change.”

Today he is Executive Director of the Resource Organizing Project (ROP). “I got to know community groups throughout New England and I began to see that the common challenge is finding the resources to sustain their work.” That issue became paramount to him and led to the founding of ROP.

“We launched in 2021 after a decade of collaboration with small justice and liberation organizations,” he explains. “We partner with movement groups that are organizing to shift power and win gains for racial, economic, climate and gender justice. Our goal is building strong, sustainable grassroots movements led by and for those who traditionally have been excluded from power.”

Today, ROP has partnered with more than 80 organizations, which it supports through fundraising learning cohorts and events, such as the annual Celebration of Grassroots Organizing in Boston.



The Resource Organizing Project’s staff at this summer’s Grassroots Celebration (from left): Ashley Blount, Dave Jenkins, Liza Behrendt and Katherine Asuncion.

“Our goal is building strong, sustainable grassroots movements led by and for those who traditionally have been excluded from power.”

— Dave Jenkins





“The summer program teaches these amazing youth about community organizing.”

— Collique Williams

THE CITY SCHOOL, a partner organization of the Resource Organizing Project, is dedicated to developing and strengthening youth and young adults from Boston and surrounding communities. The School's goal is to help them gain the leadership development and community organizing skills they need to build collective power.

For instance, City School's Summer Leadership Program, which celebrated its 30-year anniversary this summer, provides young people ages 14-19 with a life-changing summer of community building, political education and leadership development. High-school-age students from Boston's diverse neighborhoods, surrounding communities, and outlying suburbs participate in a retreat that explores identity, power and privilege. “The summer program teaches these amazing youth about community organizing,” says Executive Director Collique Williams, “and it's great practice for the kind of networking they'll need to do in the future.”

Above: Collique Williams, Executive Director, The City School



Some of this year's participants in The City School's Summer Learning Project on the evening of their graduation.



Melora Balson and Lydia Icke

The Best Possible Start in Life

“The pandemic threw a sector that already had been in crisis into a greater crisis that opened everyone’s eyes.”

— Lydia Icke

LYDIA ICKE AND MELORA BALSON knew two things when they launched the Commonwealth Children’s Fund in 2018. First, they wanted to focus on the systemic issues related to early childhood in Massachusetts. Second, they did not want the burden of establishing their own private foundation. And so, they opened a Donor Advised Fund at the Boston Foundation.

“We had zero interest in the best way to manage the assets or deal with taxes and paperwork,” says Melora. “The Boston Foundation handles all of that so that we can do the work itself.”

The work itself is a laser sharp focus on ensuring the best possible start in life for the state’s youngest residents, ages 0-5, by investing in the advocacy, policy research and public policy development that impact young children.

“The pandemic threw a sector that already had been in crisis into a greater crisis that opened everyone’s eyes,” says Lydia. “Without the child-care workforce, the economy simply doesn’t function. It was COVID’s silver lining.” Melora adds, “COVID was a major moment of realization that child care is infrastructure, like roads and bridges.”

One of the ways Melora, Lydia and others concerned about early childhood stayed in touch during COVID was a daily ‘9:30 Call,’ through which they could report on their own work and share ideas. Melora adds, “The ‘9:30 Call’ continues today and has changed the field more than anything.”

STRATEGIES FOR CHILDREN launched the powerful '9:30 Call' in the beginning of the pandemic and continues to coordinate it. Today, it's in English and Spanish and has more than 100 participants,

including invited guests, such as legislators. "It turned out to be one of the most effective tools available to those with a passion for early childhood issues," says the group's Executive Director Amy O'Leary.

Strategies for Children also has a multi-pronged Early Childhood Agenda that has taken the shape of large working groups and powerful coalitions. The Agenda speaks to all of the components that have an influence on early childhood, such as health, food security and tax policies.

"We emphasize getting input from

the people who are doing the work every day to better inform policy," explains Amy.

"The Commonwealth Children's Fund has always supported advocacy," she adds, "but now other funders are realizing that we need good policy to have good programs. That's been a big shift. The landscape has changed. Funders have stepped up. And the exciting thing is that it's not just happening here in Massachusetts. It's becoming a national movement."



Ellis Early Learning offers Boston's working families high-quality early education.

“COVID was a major moment of realization that child care is infrastructure, like roads and bridges.”

— Melora Balson



VietAID has the only Vietnamese bilingual preschool program in Massachusetts.

Impact Investing and Climate Justice

PHIL GIUDICE has worked in the energy industry for five decades—as a geologist, consultant, entrepreneur and executive. He also has been a federal and state energy official—serving as Special Assistant to the President for Climate Policy in the early days of the Biden-Harris administration and Mass. Energy Undersecretary and Commissioner in the Patrick Administration.

Counter to the daily drumbeat of bad news about our climate crisis, Phil sees reasons for optimism. “We can make big things happen—and we have,” he explains. “In the U.S., we’ve gone from using coal to generate almost two thirds of our electricity a few decades ago to less than one fifth today, and the cost of solar has dropped by 90 percent to become the least-cost generating technology.”

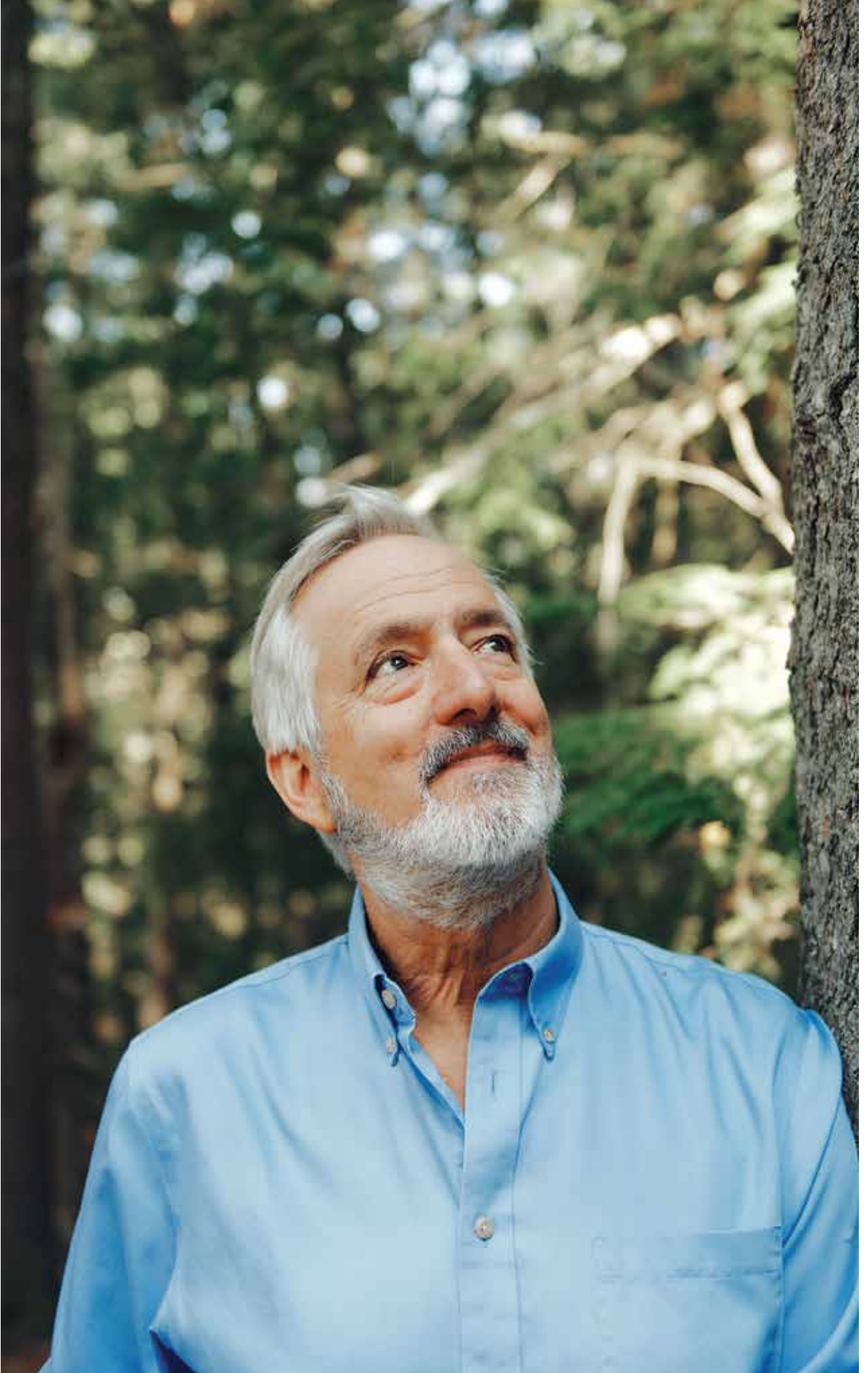
In addition to his work in the energy field, Phil has helped to launch and sustain several nonprofits, including the Center for Effective Philanthropy, City Year Boston and Boston Cares.

He and his wife, Marcia Giudice, have had a Donor Advised Fund (DAF) at the Boston Foundation for 20 years. Recently, they participated in TBF’s first ever impact investing program open to DAFs. It offered investments in various portfolios, including Climate Justice.

TBF has been engaged in impact investing since 2005, when it allocated \$15 million from its endowment for Impact First Investments as a way of complementing its grantmaking. In 2018, it launched the Business Equity Fund to provide financing for qualified Black- and Latino-owned businesses. And in 2020, TBF introduced the Impact Pool, a market-rate investment pool that has since grown to \$139 million.

“We can make big things happen—and we have.”

— Phil Giudice





CLIMATE JUSTICE was one of of four portfolios in TBF's impact investing program for Donor Advised Funds. A total of \$1.7 million was invested in three organizations, including the Capital Good Fund, Massachusetts Housing Partnership and Sunwealth.

TBF's investment in Sunwealth alone helped the organization to construct five community-based solar projects atop affordable housing properties in Dorchester and East Boston. Ultimately, the projects will deliver more than \$500,000 in energy cost savings and 11,769 metric tons of carbon reduction over the lifetime of their operation. Sunwealth's nonprofit partners were the Neighborhood of Affordable Housing (NOAH), and the Planning Office for Urban Affairs (POUA).

"In the first year alone, our annual electricity savings from solar range from \$6,500 to \$30,000 to be reinvested into our residents," says POAH President Bill Grogan." Affordable housing is all about partnership, and our partnership with Sunwealth allowed for a minimal capital investment upfront . . . and built an invaluable foundation of trust and support."

**Boston
Foundation
Funds**

About Boston Foundation Funds

THE ANNUAL FUND FOR CIVIC LEADERSHIP

Moving Equity, Moving Boston

We believe that civic leadership and civic engagement are the most powerful ways to advance economic justice and equity in Greater Boston. TBF serves as a hub of partnerships and networks that work with—and answer to—the communities we serve. Through our civic leadership, we are resolved to power progress, improve lives and strengthen communities. See *a full list of last fiscal year's donors on page 30.*

THE FUND FOR BOSTON'S FUTURE

Building Our Endowment

This all-important fund is the most flexible held by the Boston Foundation. As a result, it gives our staff the resources to align our quarterly grantmaking with our goal of moving equity forward. This endowment has been built by hundreds of generous families, individuals and businesses since 1917, when TBF received its first large bequest. Some of the funds are totally unrestricted. Others were established to support a general field of interest, such as the health of women and girls. All of these funds are permanent and will continue to grow through new bequests and expert investments with an eye not only to the present, but to the future. See *a list of some of the major donors to the Fund for Boston's Future on page 34.*



DONOR ADVISED FUNDS

Giving Through the Boston Foundation

The Boston Foundation supports the philanthropy of hundreds of individuals, families and businesses through Donor Advised Funds. These funds are established by active philanthropists, many of whom give to some of the same organizations and causes supported by our endowment. Others give to nonprofits in other parts of the country or around the world. Donors often choose to establish Donor Advised Funds as an alternative to opening a private foundation in order to avoid the administrative, legal, tax or regulatory burdens.



DESIGNATED FUNDS

Annual Support for Boston Nonprofits

These important funds provide annual support to specific nonprofit organizations, such as the Boston Ballet and the New England Aquarium. Many of them were established to pay tribute to a former director or major donor. Others honor a relative or friend who was especially dedicated to—or helped by—a particular institution.

ADDITIONAL FUNDS

The Boston Foundation also has **SCHOLARSHIP FUNDS** to increase access to education for diverse and outstanding students, and **SUPPORTING ORGANIZATIONS** that maintain their public charity status while their founders remain involved in decisions about grants.



Supporting the Annual Fund for Civic Leadership

A Commitment to TBF's Vision and Mission

AIXA BEAUCHAMP and **THOMAS MELÉNDEZ** come from what Thomas calls “humble beginnings.” “We both had immigrant parents who came to the United States with very little education and an inability to speak the language. We had to figure out a lot of things on our own.”

The two not only figured things out; they excelled in their professions and flourished as influential members of the Greater Boston community. Thomas went on to become a seasoned senior investment manager for more than 30 years in developed and developing nations globally. Aixa began her career as a program officer at the New York Community Trust and eventually founded the Beauchamp & Associates consultancy. In 2013 she co-founded the Latino Equity Fund (LEF), a unique partnership between the Boston Foundation and the Latino community.

“The Foundation’s ability to bring together leaders across sectors and guide crucial conversations around social equity and economic mobility made it the perfect partner for the LEF,” says Aixa.

Beyond bringing together what she calls, “the players and the speakers and the experts,” she points out that TBF also works to change policies. “It’s not only publishing reports and convening people. It’s also doing the hard work to bring policies to fruition,” she explains. “TBF’s leadership in getting the wage equity legislation passed this year was a major win for all women and people of color.”



When asked about the most important issue connecting all communities of color in Greater Boston, Thomas replies, “ACCESS in all capital letters. How do you provide access to capital for small businesses and leadership development? How do you create pathways to home ownership? These are all critical issues that impact communities of color.”

The couple’s yearly contributions to the Annual Fund for Civic Leadership reflect their deep belief in TBF’s role in the community. “When you look at it from the point of view of addressing racial and economic disparities, TBF has been front and center on the wide-ranging issues that affect all communities of color,” Thomas explains. “That’s why Aixa and I have a Donor Advised Fund at TBF and why we contribute to the Annual Fund for Civic Leadership. We have a commitment to TBF and its vision and mission.”

Above: Governor Healey signing the 2024 Wage Equity bill.

“TBF’s leadership in getting the wage equity legislation passed this year was a major win for all women and people of color.”

—Aixa Beauchamp



MOVING EQUITY. MOVING BOSTON.

The Annual Fund for Civic Leadership

We believe that civic leadership and civic engagement are the most powerful ways to advance economic justice and equity in Greater Boston. We serve as a hub of partnerships and networks that work with—and answer to—the communities we serve. Through our civic leadership we are resolved to power progress, improve lives, and strengthen communities.

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

\$100,000+

Anonymous (2)
Karen and Rob Hale
Dwight and Kirsten Poler
Jennifer and Robert Waldron

\$50,000-\$99,999

Anonymous
Bancel Philanthropies
Josh and Anita Bekenstein
Jane Brock-Wilson
Sandra and Paul Edgerley
Chris and Mary Beth Gordon
Jeff Gore
Barbara and Amos Hostetter
Jampart Charitable Trust
The Klarman Family Foundation
Robin G. MacIlroy and
William C. Spears
Linda Mason and Roger Brown
Randy Peeler
Richard K. Lubin Family Foundation

\$25,000-\$49,999

Anonymous (2)
Amy and David Abrams
Thomas and Lisa Blumenthal
Catherine and Paul Buttenwieser
Kevin and Julie Callaghan
John and Stephanie Connaughton
Brian and Karen Conway
Cummings Foundation
James and Audrey Foster
Four Lucky Dogs
John Hancock
Liberty Mutual Foundation
Phil and Ellie Loughlin
Ronald O'Hanley
Stephanie and Brian Spector
Arthur M. Winn and Family

\$10,000-\$24,999

Anonymous (6)
Noamit Armony Erel and Izhar Armony
Bank of America Charitable
Foundation
Raja and Priyanka Bobbili
The Boston Globe
Anne C. Bromer
Michael and Lisa Bronner
Rick Burnes
Constance Counts
Davis Family Charitable Foundation
Laura Davis and Tyler Jacks
Eastern Bank
Gayané and Tom Ebling
Michael and Barbara Eisenson
Eos Foundation
David and Nina Fialkow
Fabian and Suzanne Fondriest
Katherine Gross and Peter Thorne
The Hamilton Company Charitable
Foundation
Robert and Diane Hildreth
Alan and Christine Huber
David Humphrey
Charles and Charlene Hyle
Edmund and Margaret Ingalls
Elizabeth and Woody Ives
Stephen and Jill Karp
Robert C. Ketterson
Debra Krupp
LARS Charitable Fund
Jeannie and Jonathan Lavine
Bradley and Kristen Lewis
Anne R. Lovett and
Stephen G. Woodsum
Martin and Tristin Mannion
Kristin and Paul Marcus
Carl J. Martignetti
Mass General Brigham
William and Ann Marie McCarron
Christopher McKown and
Abigail Johnson

Stephen and Jane McSweeney
Paul Merrill and Gail Carroll
Cathy E. Minehan
Carl Novotny and Judith Swahnberg
Katharine and Alexandra Olmsted
Leslie and Devin O'Reilly
Tracy and Leon Palandjian
Saul Pannell and Sally Currier
Lee Pelton
Plimpton Shattuck Fund
Prime, Buchholz & Associates
Richard and Susan Smith Family
Foundation
Mark and Etta Rosen
Daniel Ross
Samuels & Associates
David Scudder
Robert Small and Christine Olsen
Robert Sprague
Jill and Michael Stansky
Donald and Margaret Steiner
James M. and Cathleen D. Stone
C. David Swindell and
Gail F. Goodman
Kate and Ben Taylor
Wagner Foundation
Lori and E.J. Whelan
The Zug Family Fund

\$5,000-\$9,999

Anonymous (5)
The 1156 Foundation
Pam and Bob Adams
Barbara Jane Anderson
Karen and Jim Ansara
Antonio and Sabine Pietri
Foundation
Arba Lifnot Boker Fund
Arnott Family
Andrew and Melora Balson
Aixa Beauchamp and
Thomas Melendez
Kendalle Burlin O'Connell

Margaret W. Casey
Katherine Chapman Stemberg
Elyse D. Cherry
Ciccolo Family Foundation
Todd Cronan
Carol Deane
Richard and Marcia DeWolfe
Digger and Susan Donahue
The Drew Company
Steven and Nancy Fischman
Paul and Betty Francisco
Paul and Patricia Gannon
Gardiner Howland Shaw Foundation
Robert and Linda Glassman
Marjorie and Nick Greville
Linda and Jay Hooley
John Hancock Investments
Joseph G. Prone Foundation
Martha Juelich
Michael and Martha Keating
John Kimpel
Debbie and Abram Klein
Pamela Kohlberg and Curt Greer
Shari and Robert Levitan
MassMutual Foundation
Lynn and Patricia Mormann
Rosabeth Moss Kanter
OneUnited Bank
Glenn and Faith Parker
Robert A. Petersen
Point32Health & Foundation
Elizabeth and Robert Pozen
Elizabeth and Fidel Ramos
Ellen Remmer and Chris Fox
Rohda Family Charitable Foundation
Margaret Schmidt and
Kenneth Danila
Mark and Marie Schwartz
State Street Corporation
Jon Steffensen and Elizabeth Frantz
Jane Steinmetz
Howard and Fredericka Stevenson
The Trefler Foundation

\$2,500-\$4,999

Anonymous
Jennifer W. Aronson
Robert Bechek and
Elizabeth Freeman Bechek
Bilezikian Family Foundation
Blue Cross Blue Shield of
Massachusetts
Margaret A. Bush
Jim Canales and Jim McCann
Citizens
Meredith and Eugene Clapp
John H. Deknatel and Carol M. Taylor
Timothy and Maureen Dibble

James A. Ellis
Kate Enroth and Dana Schmaltz
Peni A. Garber
David and Anne Gergen
The Goldberg Winter Family
Carol R. Goldberg
Deborah B. Goldberg and
Michael Winter
Joshua R. Goldberg
Evan L.G. Winter and
Meredith S.G. Winter
Caitlin and Spencer Haught
JD Nelson Charitable Trust Gift Fund
Louis and Marcia Kamentsky
Becky Kidder Smith
Sheila and Jason Lawrence
Paul W. Lee
Will and Anastasia Lyman
Maureen and James Mellowes
Robert and Joan Murray
Beatrice and Peter Nessen
Jerry Rappaport, Jr. and
Lori Rappaport
Roger and Lisa Krakoff Family Fund
Scott E. Squillace, Esq. and
Christopher J. Gayton
Craig and Lynne Standish
John and Nadine Suhrbier
Bruce and Kathleen Van Saun
Emily V. Wade
Philip N. Warburg and
Tamar R. Warburg
C.A. Webb
Bennie and Flash Wiley

\$1,000-\$2,499

Anonymous (10)
Aliad Fund
David and Sharman Altshuler
Charles Anderson
The Apgar Family
Zamawa Arenas
Marta K. Bach
Jeannie and Henry Becton
Roger and Anne Berman
Donald and Alpine Bird
Holly and Richard Bonomo
Bruce J. Anderson Foundation
Bunker Hill Community College
Gordon Burnes and Suzie Tapson
Jeffrey and Lynda Bussgang
Vanessa Calderón-Rosado, Ph.D
Stephen Carr and Louise Elving
Bithiah Carter
Gerald and Kate Chertavian
John Clark and Elizabeth Barringer
Lois and Linc Cornell
Donna Cowan and Barry Nelson
Egil D. Croff

Steve Crosby and Helen Strieder
John Dalton
André and Marilyn Danesh
Belden and Pamela Daniels
David V.N. Taylor Foundation
Laura DeBonis and Scott Nathan
The Druker Company
Ellen Epstein
Audrey Epstein Reny and Steven Reny
Judith and John Felton
Daniel Fleishman and Barbara Shapiro
M. Dozier Gardner
Jennifer Gilbert
Deborah Glotzer and David Waltz
Goughan Gaffney Charitable Fund
Joshua and Sarah Greenhill
Kate Guedj
Cynthia Guiles
David and Betsy Harris
Joanne K. Hilferty
Hub International
Jonathan Hurwitz and Debbie Bing
Income Research + Management
Ira Jackson
Holly and Bruce Johnstone
Dr. Jordan S. Ruboy Charitable Fund
Paul and Mary La Camera
Edward Ladd
Lade Family Charitable Fund
J. Dayne Lamb and Gardner N. Stratton
Barbara B. Leggat
Jo-Ann and Martin Leinwand
Joshua Levy and Rachel Rock
Linde Family Foundation
Chuck and Susie Longfield
Russell and Barbara Lurvey
Olivia Lyman
Darren and Kristen Magas
Petrina Martin Cherry
Edward and Sydel Masterman
Janice and Bill McCall
Louisa and Kevin McCall
Ted and Rachel McEnroe
Ian McIsaac and Suzanne Durrell
Myechia Minter-Jordan
J. Keith and Angela Motley
Maria Mucci
NAIOP Massachusetts, The
Commercial Real Estate
Development Association
Stephen and Cynthia O'Brien
Mary Parker
Kevin Phelan
Reverend Diana W. Phillips
Alison Poorvu Jaffe and Daniel Jaffe
Larry and Valerie Post
Daniel J. Raizen

ANNUAL FUND FOR CIVIC LEADERSHIP

Abby and Gene Record
 David and Sybil Richardson
 Sarah Rothermel
 Charles E. and Deana M. Shirley
 Kate and Raleigh Shoemaker Jr.
 Binkley and Paula Shorts
 Alan and Susan Solomont
 David F. and Patricia R. Squire
 Lisbeth Tarlow
 David Thornton and Ferit Albukrek
 Michael and Nancy Tooke
 James P. Whitters III
 Judy and George Wilson

Up to \$999

Anonymous (10)
 Rosalin Acosta
 Deja Alexis-Bell
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\$1M+

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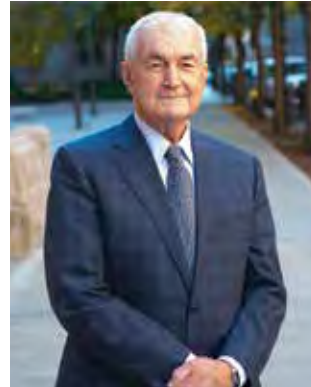
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\$10K-\$999,999

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 Estate of Alice A. Abbott (1967)
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 Estate of Miriam S. Alley (1965)
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 Estate of Frederick W. Bridge (1942)
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 Estate of Charles T. Carruth (1983)

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 Leon R. Eyges Memorial Fund (1963)
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 Grand Bostonians Dinner (1984)
 Estate of Anne C. Gray (2010)
 Donald Gregg (1963)
 Estate of Patricia Grisham (1964)
 Estate of Joseph Guild (1964)
 Estate of John H. Hagopian (2002)
 Estate of Ellen Page Hall (1931)
 Estate of Dorothy C. Harris (1967)
 Carrie A. Hartley Trust (1963)
 Estate of Elizabeth M. Hay (1972)
 Haymarket People's Fund (1994)
 Estate of Fred R. Hayward (1969)
 Helen P. Hennessey Trust (1984)
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 Vladimir N. Herteli Trust (2003)
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 Estate of Anna P. Hills (1969)
 Estate of Harry Holland (2008)
 Estate of Grace Scott Hollett (2005)
 Estate of Agnes G. Homes (1961)
 Katherine B. Hood (2001)
 Estate of Adeline D. Hooper (1973)
 Estate of Mary Frothingham Hooper (1961)
 Estate of Elizabeth B. Hough (2000)
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 Estate of Muriel Hurovitz (2019)
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 International Council Trust (2000)

FUND FOR BOSTON'S FUTURE

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 Estate of Frances A. Jordan (1978)
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 The Keane Family Foundation (1997)
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 Pauline Klevens Charitable Remainder Unitrust for Linda K. Gottlieb (2024)
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 Estate of James G. Knowles (1982)
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 Estate of Louise P. Kush (1997)
 Aimee Lamb Trust in memory of Winthrop and Aimee Sargent (1980)
 Estate of Ida Fales Lamb (1967)
 Lambert Marital Trust (2007)
 Mr. and Mrs. Herbert Lee (1999)
 Thomas Lee (1997)
 Barbara Estabrook Livermore Trust (1982)
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 Mass General Brigham (2014)
 Alice L. McDougall Fund (2022)
 Estate of Ann G. McFarlane (2000)
 Ethel Fay McGuire Trust (1973)
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 Estate of Frank L. Richardson (1975)
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The Boston Foundation's unique Equity Funds are three groups built in partnership with deeply committed community leaders. As such, they are central to our work advancing equity by amplifying the power of grassroots philanthropy to meet the needs of some of our most marginalized communities.

These funds are committed to investing in grantmaking to nonprofit organizations that provide critical services to their communities, research, public forums and convenings, and strategic partnerships. Over more than a decade, and thanks to generous support from community-based donors and aligned institutions, some \$5.75 million in grants have been made to nonprofits meeting the needs of these communities. All three also reflect TBF's commitment to civic leadership by publishing leading-edge research and bringing stakeholders together to form strategic partnerships for change.



M. Scott Knox
Executive Director

The **EQUALITY** Fund AT THE BOSTON FOUNDATION

The **EQUALITY FUND**, established in 2012, the largest LGBTQ+-focused fund in the state, seeks to advance the equitable treatment of LGBTQ+ individuals and their families and support Greater Boston nonprofit organizations that serve and strengthen the LGBTQ+ community.



Javier Juarez
Executive Director

THE **LATINO EQUITY** FUND AT THE BOSTON FOUNDATION

The **LATINO EQUITY FUND**, founded in 2013, is the first Latinx-focused fund in the Commonwealth and uses its influence and platform to amplify diverse voices and perspectives within the Latinx community in Greater Boston and across the state, with a focus on achieving greater and more equitable access to economic prosperity and well-being.



Danielle Kim
Executive Director

THE **ASIAN COMMUNITY** FUND AT THE BOSTON FOUNDATION

The **ASIAN COMMUNITY FUND**, founded in 2020, is the first and only philanthropic fund in Massachusetts designed to galvanize and unite the diverse ethnicities within the Asian American and Pacific Islander community, incubate new partnerships, and build a stronger advocacy voice.

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

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

—Bill Nigreen and Kathleen McDermott

LEGACY SOCIETIES

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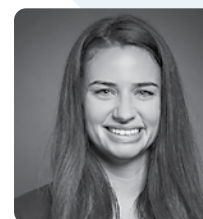
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Collaborate with us to increase the power of our grantmaking and create a more equitable Boston. No one funder can move the needle on our most pressing and intractable problems. We combine our philanthropy with deep public policy work that brings about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

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Establish a Donor Advised Fund at the Boston Foundation. This is ideal if you want the benefits of opening or maintaining a private foundation with none of the administrative, legal, tax or regulatory burdens. You can maximize your philanthropy with access to our research, expert asset management, and unparalleled experience with donors and Greater Boston's nonprofit organizations. Your giving can be local, national or international in scope.

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IMPACT INVESTING

We offer a number of opportunities for fund advisors to engage in impact investing. And as a foundation with our own impact-first investments and initiatives as well as a market rate Impact Pool we have expertise few other organizations can offer.

GIVE TO US

Our Annual Fund for Civic Leadership supports the most effective way TBF contributes to the bold ambition of achieving equity. Our work informs public policy, catalyzes conversations and advocates not only for change, but to repair and heal the historical harms of inequity.

GET STARTED

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



M. Scott Knox, Executive Director of the Equality Fund, and legacy donor Charlie Walsh

Supporting Our Nonprofit Partners



EQUITY AT THE CENTER

To advance equity and close the gaps caused by our region's greatest disparities, we tackle the individual, systems-level and root-level causes of inequity. To do this, our work with our nonprofit partners extends beyond grantmaking, allowing us to work together to tackle these complex and challenging issues most effectively.

Our work is focused on Pathways to Equity—four interconnected areas where we believe the Foundation is

best situated to support and partner with community-based organizations and leaders to advance their work.

OUR FOUR PATHWAYS TO EQUITY

Child Well-Being • Economic Opportunity • Community Wealth • Community Leadership

OUR SAFETY NET GRANTS

Our Safety Net Grants program is designed to support social service organizations that respond to essential needs for marginalized communities and vulnerable residents in Greater Boston. These grants provide general operating funds to nonprofits addressing critical, immediate and essential needs.

OUR NONPROFIT SECTOR INFRASTRUCTURE TEAM

As part of our Community Leadership Pathway, our Nonprofit Sector Infrastructure Team offers services to the nonprofit sector, including a bi-monthly newsletter, *Nonprofit Update*, which connects nonprofit leaders across the Greater Boston region and beyond with RFP and grant opportunities, important upcoming events, and other news and resources to support a thriving nonprofit sector.

FOR MORE ABOUT PARTNERING WITH US

We encourage you to visit our website at tb.org and choose “Nonprofits” to explore our four Pathways to Equity in detail. If your organization sees a potential partnership with us, we invite you to reach out to that Pathway's Team to discuss grants and other opportunities. You will also find information about how to apply to our Safety Net Grants program and other resources for nonprofits.

Staff of Dorchester's VietAID, a grantee of the Asian Community Fund at TBF

2024 Financial Overview

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 pools include the Balanced Plus Pool, the Impact Pool and the Short-Term Pool. The Balanced Plus Pool asset mix is expected to produce the highest long-term investment return.

The Balanced Plus Pool asset mix is expected to produce the highest long-term investment return.

INVESTMENT OVERSIGHT

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

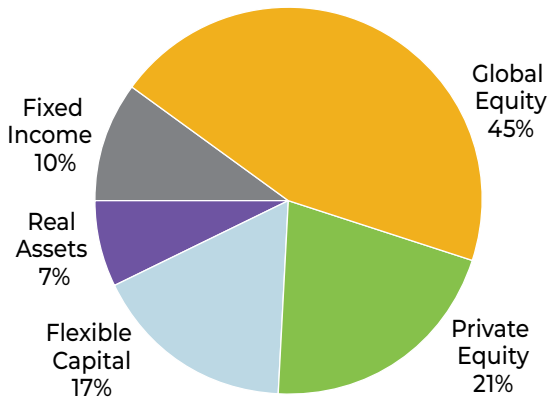
INVESTMENT PERFORMANCE

(June 30, 2024)

	1 YEAR	3 YEARS	5 YEARS	10 YEARS	15 YEARS	20 YEARS
Fund for 21st Century Investment Options:						
Balanced Plus Pool	10.2%	3.8%	8.7%	7.0%	8.2%	7.0%
Impact Pool (established 6/1/20)	13.0%	2.2%	n/a	n/a	n/a	n/a
Short-Term Pool (established 1/1/10)	5.5%	3.0%	2.2%	1.5%	n/a	n/a
Benchmarks:						
FTSE World Bond Index	-0.6%	-6.9%	-3.2%	-1.2%	0.4%	1.8%
65% MSCI A.C. World/35% FTSE World Bond Index	12.1%	1.1%	5.9%	5.2%	7.0%	6.0%
MSCI All Country World Stock Index	19.4%	5.4%	10.8%	8.4%	10.3%	7.9%
S & P 500 Stock Index	24.6%	10.0%	15.0%	12.9%	14.8%	10.3%

Notes: Average annual returns are shown for periods longer than one year. Performance is shown net of investment manager fees. Past performance is no indication of future results.

BALANCED PLUS POOL

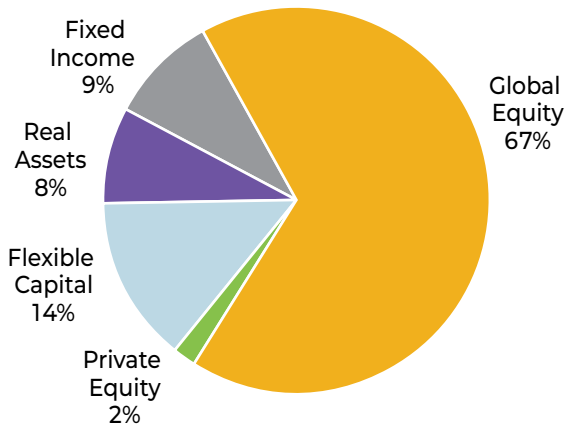


The Balanced Plus Pool assets include global stocks, investments with flexible capital managers, private equity, venture capital, real estate, and treasury securities. The Impact Pool includes investments that generate positive social global impact with an eye toward our local community. Diversification among multiple asset classes should help to reduce the volatility of the Foundation’s investment returns.

THE PHILANTHROPIC INITIATIVE

The Philanthropic Initiative (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2024, the operations of TPI added \$3.4 million of service fee income to the operations of the Foundation.

IMPACT POOL



FINANCIAL SUMMARY

Total assets of the Boston Foundation were \$1.9 billion at June 30, 2024. For the year then ended, net investment returns for the Balanced Plus Pool were 10.2% and for the Impact Pool were 13.0%. Total investment returns were \$180 million. During the same period, the Foundation received \$181 million in contributions and paid \$183 million in grants. Other expenses totaled \$31 million.

FINANCIAL STATEMENTS

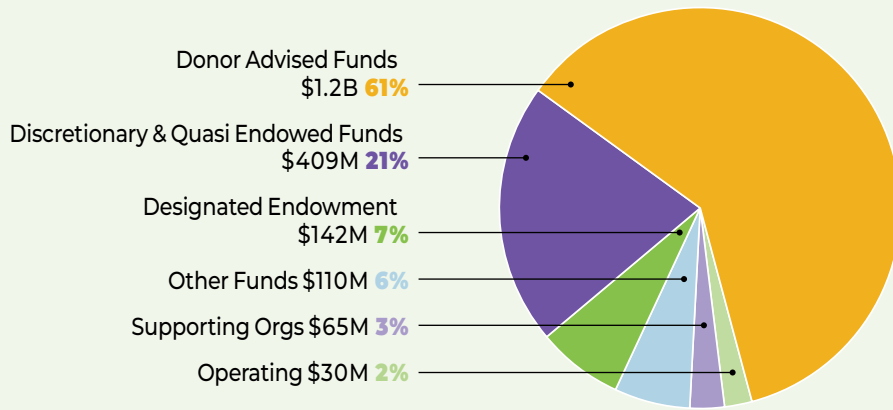
The Boston Foundation’s financial statements are prepared in accordance with policies and procedures overseen by the Foundation’s independent Audit Committee and the Board of Directors. The statements and Form 990 are available on our website at www.tbf.org.



TPI’s Philanthropy’s Critical Role in the Crisis in Ukraine helps guide funders in narrowing down how to be most useful in response to humanitarian crises.

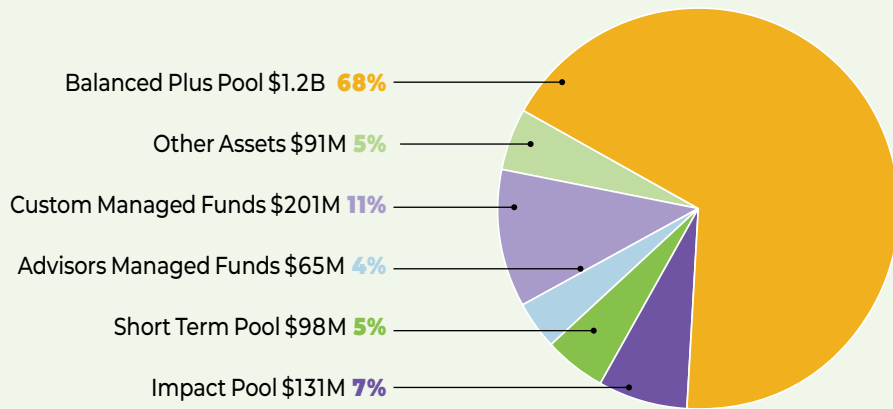
ASSETS BY FUND TYPE

as of 6/30/2024



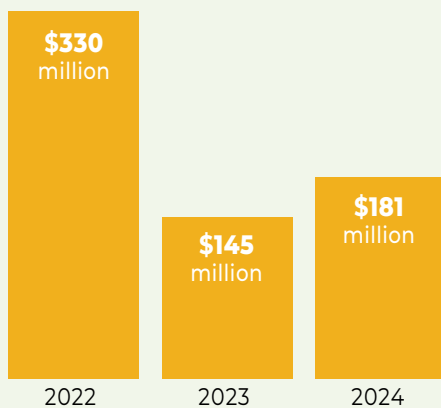
ASSETS BY INVESTMENT TYPE

as of 6/30/2024



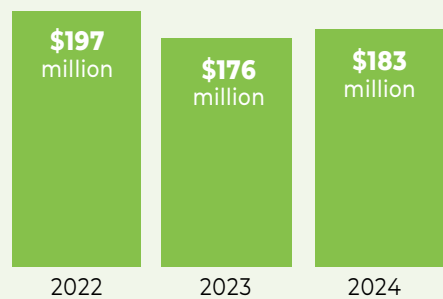
TOTAL GIFTS RECEIVED

3-Year History by Fiscal Year



TOTAL GRANTS MADE

3-Year History by Fiscal Year



Board of Directors

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

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Leigh Gaspar *Secretary*



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M. Lee Pelton
President and CEO
The Boston
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Pratima Patil, *Assistant Director of Program and Policy*



**The Boston
Foundation**

