

The Boston Foundation

Stories FROM THE City

COVER STORY

A Passion for Youth Peace

ALSO:

**Revering a Historic Gem
Warriors on the Homefront
For the Whole Child**

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LETTER FROM THE CHAIR

Challenging times like those we face today both test the mettle of a community's major institutions and reaffirm their importance. Since the early part of the 20th century, the Boston Foundation, as Greater Boston's community foundation, has been a reliable source of support for our community's nonprofit institutions and a steady force for good. Its work has been shaped by the needs of the people and the neighborhoods it was created to serve—and always will be.

The Foundation's track record of steadiness and experience will serve this community well in the coming days. And its unique ability to bring people together to tackle our area's most serious problems—and help shape the best ways to solve them—will only strengthen its capacity to serve.

I am pleased to report that the Boston Foundation enters 2009 on the heels of a very strong year of record-breaking support. During 2008, the Foundation raised more than \$113 million—with our current family of donors alone giving \$60 million—more than ever before. In addition, the Foundation leveraged some \$30 million from other sources, including other foundations and government, for programs that benefit our community—like SkillWorks, a successful workforce development program, and a special loan fund designed to stabilize neighborhoods devastated by foreclosures.

This year we also completed a campaign to build a permanent Boston Foundation Arts Fund, raising \$28 million (\$8 million beyond the goal). And more than \$1 million was raised from our donors and others for the Foundation's Civic Leadership Fund, which provides the crucial resources needed to make progress in meeting the toughest challenges our community faces.

You will learn more about the Foundation's remarkable year as you read through the moving stories in this report. The first story, called "A Passion for Youth Peace," is an inspiring tale about a group of young people who came together to promote peace among their peers. It is reminiscent of a time that came to be called the "Boston Miracle," but it was no a miracle. Rather it was the result of a great deal of hard work and cooperation—and it proved that when determined people come together around a common goal, even the most serious problems can be solved.

As we enter a new year, the last year that I will serve as Chair, the Boston Foundation is renewing its dedication to promoting safety on the streets of Boston for our young people. We also are renewing our commitment to do everything in our power to help our community tackle the other serious problems and challenges we face. We make these commitments with the belief that when good people come together around a common sense of purpose—and when a community's resources are marshaled in support of that purpose—anything is possible.

Reverend Ray A. Hammond
Chair

REPORT FROM THE PRESIDENT

As Greater Boston's community foundation for more than 90 years, the Boston Foundation's goal has been to place our city's neighborhoods and residents at the heart of everything we do. We have been privileged to witness and work with talented and courageous people of all ages and backgrounds as they face sometimes daunting challenges and experience small and large victories—often with tremendous wisdom and grace.

In this year's annual report, we are taking the opportunity to tell just a few of the stories that have touched us this year—stories that reflect our grantmaking and civic leadership, our relationships with our donors and our grantees, and all of the other work we are doing on behalf of this diverse and wonderful community that we call home.

More than anything, this report tells the stories of some remarkable individuals. Courageous young people who are determined to pursue youth peace in the midst of tragedy and violence. A dedicated attorney who has chosen the pursuit of justice over society's immediate rewards. A mother who has maintained a sense of optimism in the midst of trying circumstances because she wants her children to grow up with hope. A cadre of fresh leaders determined to prevent chronic disease and promote health in creative ways. A longtime activist and sage mentor. Two young donors who are helping to shape the philanthropy of the future.

As you read through this publication, remember that for every story about individual commitment and institutional determination, there are hundreds of other stories we could have told. And while each story focuses on just a few nonprofit organizations or individuals, within each you will find new and innovative strategies that can have a positive impact on scores of other organizations and thousands of people.

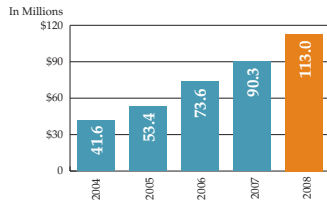
The story about the revitalization of the Paul Revere House represents dozens of other cultural institutions that are benefiting from increased support for our state's cultural facilities. The story titled "Life is Back on Carson Beach" represents similar efforts on 13 other beaches that enhance the geographical edges of our metropolitan area. A tale of one young immigrant's journey to fulfill her dreams represents thousands of others. And the story about how two nonprofits successfully merged can serve as a roadmap for other organizations that need to improve their chances of surviving in hard economic times.

Together, these stories will give you a sense of the whole life of our city—and of the full reach of Greater Boston's community foundation today. We are proud of the work that we do, both through the grants that we and our donors make and the progress that we see as the result of our civic leadership. But we are most proud of the people and organizations that we are privileged to know and work with every day. In these pages, you will meet just a few of them.

Paul S. Grogan
President and CEO

2008 AT THE BOSTON FOUNDATION

In addition to another record year in gifts received, strategic grantmaking and the completion of a campaign for a permanent fund for the arts, the Foundation's role as a civic leader—provider of fresh information, major convener and supporter of enlightened public policy—was front and center in 2008. Here are a few highlights:



Another Record Year Sees More than \$113 million in New Gifts

From July 1, 2007 to June 30, 2008, gifts totaling more than \$113 million were received by the Boston Foundation, with 45 new funds established, exceeding all other fiscal year totals. Gifts from current donors to the Foundation totaled \$60 million, 48.5 percent higher than last fiscal year.

Understanding Boston Takes on Critical Issues

From a high-profile dialogue about Pilot Schools to *Passion & Purpose*, a groundbreaking and provocative study of the state's nonprofit sector, to *Lots of Health Care, Not Enough Health*, a critical and sweeping report on Boston's health status, this series of reports, task forces and action agendas has a banner year.

The Civic Leadership Fund Raises More than \$1 Million

The Civic Leadership Fund supports the *Understanding Boston* series and the Foundation's work helping to shape public policy. The Fund also offers support for the internationally acclaimed *Boston Indicators Project*, an initiative of Greater Boston's civic community that provides access to information, fosters public discourse, shapes a series of shared civic goals—and releases a biennial report that tracks progress in 10 sectors, from Civic Vitality to the Economy and Housing.

New Websites are Launched

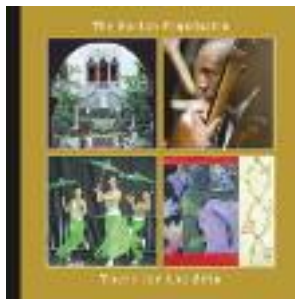
The address remains the same—www.tbf.org—but everything else is new, with dropdown menus for easy access, enhanced information for grantees and donors and a brand new *Understanding Boston* section. The Foundation also launches an enhanced and innovative *Boston Indicators Project* website—www.bostonindicators.org—illuminating our entire region with data, maps, charts and links.





Call to Revolution on NECN

A top-notch series of eight public affairs television programs on NECN explores the crises and opportunities outlined in the latest *Boston Indicators Report*, and features public officials and other experts discussing everything from education and workforce development to the environment.



Surpassing a Goal for a Permanent Arts Fund

The Boston Foundation meets and surpasses its goal of raising \$20 million for a permanent fund to support the arts in Greater Boston. A gift from the estate of Brother Thomas Bezanson, a world-renowned ceramic artist, brings the total to \$28 million. The achievement is celebrated through a special publication and celebration.



SkillWorks Celebrates Five Years and Launches Phase II

The Foundation continues to invest in this public/private workforce partnership, which already has trained more than 3,000 workers and served as a model for the \$50 million National Fund for Workforce Solutions.

\$750,000 for Youth Summer Youth Programs

The Foundation, the City and the Commonwealth also come together with other funders to provide financial support to more than 70 organizations that offer summer programs for Boston youth, allowing them to expand their hours and help to keep teens safe.



Landmark Policy Gains

The Foundation's presence at the State House and strong relationships with the Patrick Administration and Legislators has a powerful impact on new laws and budget recommendations—from education reform to revamping the CORI system, to funding cultural facilities and improving the area's beaches.

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Board members not in group photo:



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UNDERSTANDING

THE BOSTON FOUNDATION

A flexible giving vehicle for donors
A major funder of nonprofit organizations
A civic leader and convener

Established in 1915, the Boston Foundation is Greater Boston's community foundation.

Mission

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

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

INNOVATION

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

INFORMATION

Through its *Understanding Boston* series, the Boston Foundation commissions fresh research—adding to a growing body of knowledge about the most important issues facing Greater Boston and the region. The Foundation shares this information through a series of popular forums that are attended by thousands of people every year. The Foundation also sponsors the *Boston Indicators Project*, which provides a comprehensive, constantly-updated body of information about every aspect of life in Greater Boston through an award-winning state-of-the-art website at www.bostonindicators.org.

IMPACT

In its unique role as a grantmaker, developer of special initiatives and civic leader, the Foundation focuses on tangible, measurable results through its funding and special initiatives, while leveraging millions of dollars in investments from other foundations, donors, and government. It also establishes cross-sector task forces to tackle the toughest community challenges.

INVOLVEMENT

With some 900 separate funds established either for the general benefit of the community or for special purposes, the Foundation works closely with its donors to achieve their philanthropic goals. Some donors give unrestricted funds to the Permanent Fund for Boston, others earmark

gifts for special purposes, and a number work closely with Foundation staff to focus their dollars on the areas of community life they care about most.

Governance and Staff

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

Grantmaking

The Boston Foundation and its donors make millions of dollars in grants to hundreds of nonprofit organizations in Boston and across the country. Discretionary grantmaking has a strategic focus on three areas of community life that are deemed crucial to the future competitiveness of Greater Boston and the region: Housing and Community Development; Education; and Workforce Development. Grants also are made in other important areas: Arts & Culture; Civic Engagement; Community Safety; Health and Human Services; and the Urban Environment. Special grantmaking initiatives are designed by the Boston Foundation's staff to address the most pressing issues affecting contemporary community life in Greater Boston.

Assets

The Foundation's endowment stands at more than \$900 million. Its charitable assets are invested in The Fund for the 21st Century—a pool of investment management products created specifically for the Foundation that includes nationally-renowned money managers.

MORE THAN **\$30 MILLION** IN ADDITIONAL FUNDS LEVERAGED

As Greater Boston's community foundation, the Boston Foundation is in a unique position at the center of this region's philanthropic and nonprofit sectors, which enables it to leverage millions of dollars in additional resources for the benefit of the city and region. In 2008:

Close to \$3.6 million was received by the Foundation for special initiatives, such as those in the areas of civic engagement, homelessness prevention, expanded summer programming for teens and workforce development.

\$2.3 million was raised for SkillWorks from private and public sources, with a total of close to \$15 million pledged over the five years.

Close to \$1.1 million in additional funds was managed and distributed by the Foundation, including \$450,000 for The Wallace Foundation's Excellence Awards to local arts organizations.

Some \$3.13 million was generated by collaboratives housed at the Foundation, including \$586,000 for English for New Bostonians; \$550,000 for Home Funders; \$988,000 for the Achieving the Dream higher education funders collaborative; \$462,000 for EdVestors and \$449,000 for the Boston Schoolyard Initiative.

More than \$250,000 in additional funds was distributed in collaboration with Microsoft Corporation's "Unlimited Potential" giving program.

More than \$1.5 million in co-funding came from Boston Foundation donors to strengthen the impact of the Foundation's Discretionary grantmaking in Greater Boston.

Program Related Investments (PRIs) totaled \$3.5 million, including \$2 million to Massachusetts Housing Investment Corp; \$500,000 in grant funds that the Foundation helped to raise; and an additional \$1 million in PRI loans from Living Cities as part of a \$20 million Neighborhood Stabilization Loan Fund.

More than \$14.8 million in Donor Advised Fund grants were directed to organizations supported by Discretionary Funds during 2008.

PUTTING OUR KNOWLEDGE AND PARTNERSHIPS TO WORK

*The Boston Foundation's Approach to Civic Leadership
Makes Significant Gains with a Simple Formula That Works:*

FRESH RESEARCH + FORUMS + TASK FORCES + ACTION AGENDAS = REAL CHANGE

The Boston Foundation works with hundreds of leaders and stakeholders from all sectors of community life to achieve real, measurable change in the areas that are most central to our region's competitiveness in the global economy.



Fresh Research Fuels Ideas

This year's reports included two massive and illuminating studies of major sectors of community life in the Commonwealth. In the spring, the most comprehensive study ever conducted on the state's nonprofit sector was released. Titled *Passion & Purpose: Raising the Fiscal Fitness Bar for Massachusetts Nonprofits*, the report was also a "call to action" in the form of recommendations designed to address significant weaknesses in the sector. Following close on its heels was the release of *Staying Power: The Future of Manufacturing in Massachusetts*, which debunked theories that manufacturing has seen its day, and re-established the sector as a potent factor in the regional economy.



Forums Bring People Together in Dialogue

Representatives of Governor Deval Patrick's administration and hundreds of others came to the Boston Foundation this year to discuss the results of studies and engage in stimulating dialogues. Overflow crowds attended forums on the continuing crisis in housing, strong results by Pilot High Schools, the vitality of the state's arts and cultural sector and the strengths and weaknesses of the nonprofit sector. A special dialogue on race, class and cultural participation actively involved the entire audience in a fascinating dialogue.



Task Forces and Action Agendas Lead to Real Change

A blue-ribbon Task Force on CORI Employer Guidelines, established by the Foundation and the Crime and Justice Institute, catalyzed the Governor's CORI reform executive order and bill. The Commonwealth Housing Task Force, convened by the Foundation, successfully lobbied for \$25 million in available state funds for the Smart Growth Housing Trust Fund. The Massachusetts Campaign for Cultural Facilities, co-chaired by the Foundation, reaped close to \$25 million in funds to 120 cultural organizations. And the Metropolitan Beaches Commission, funded in part by the Boston Foundation, added \$2 million in state support for the city's beaches.

Stories

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A P A S S I O N F O R

Youth Peace

*How a summer program kept young people off the street—
and reclaimed a young man's legacy*

H.Y.P.

W

hen Kendra Jones first met Jahmol Norfleet, she wasn't interested in getting to know him any better. "I knew he liked me, but I was too young and he was in a gang," she remembers. "I used to live in Grove Hall and he had family around there, so we would talk a lot, but that was it. Then he got locked up and we lost contact."

Jahmol had been arrested for possession of a firearm and was in jail for a year. While he was away, his friend Yorky was shot—and then everything seemed to change for him. "His sister told me his letters changed," explains Kendra. "He started writing about working for peace. When he got out, I went to his coming home party. I could see he'd changed—he'd matured. We talked a lot about peace. I was happy for him."

Kendra became Jahmol's girlfriend, and started realizing what she wanted to do in life. "I was taking a course in high school about criminal justice. I loved it," she says. "It was something I could relate to and connect to. Jahmol said 'You should do something with that.' We would talk about it. I started to realize that I wanted to get into the criminal justice field."

At the same time, Jahmol was creating what he called his vision for youth peace. "He said, 'All these little kids around here look up to me. I have to do something positive, because I want them to look up to me for a good reason,'" explains Kendra. "That's when he started talking about doing this video based on all the guys he knew who wanted to change their lives for the better."

But neither Jahmol's video nor his vision for youth peace were meant to be, at least during his lifetime. On the evening of November 28, 2006, he was shot and killed outside his grandmother's house on Holworthy Street in Dorchester. His sister, Teah Norfleet, told the *Boston Globe* that two hooded men had opened fire on him as she stood with her brother. She was grazed on the leg by a bullet.

"The day he was killed I can remember like yesterday," says Kendra. "We had just been talking to each other on the phone. Fifteen minutes later, a friend of his called to say he just got killed. It was hard. It was my senior year. It was the longest year ever."

Kendra Jones, Justice Sharpe and Jumaane Kendrick appear in *Jahmol's Vision for Youth Peace*.



E.

Teah Norfleet (center), Jahmol's sister, participates in the workshop on violence.

But Kendra is not one to stay down long. She became involved in a group of young people, including Jahmol's sister, Teah Norfleet, and his cousin, Charice Fuller, who were determined to finish what Jahmol had started. Working together under the auspices of a summer program run by the City Mission Society of Boston, called **H.Y.P.E.**, which stands for **Humboldt Youth Partnering for Empowerment**, the group found the right producers and finished the video, calling it *Jahmol's Vision for Youth Peace*.

In one of the video's opening scenes, Reverend Miniard Culpepper, pastor of the Pleasant Hill Baptist Church, which serves as a home for H.Y.P.E., says: "What many



adults don't realize is that these kids are scared," he says. "They are scared." Teah Norfleet adds: "We are leading a traumatic life."

One Summer Evening

This summer, on the evening of August 18th, some of the friends who worked on the video together gather at the

church for a workshop on violence. Before the session begins, they talk about their plans for the future.

Kendra's cousin, Jumaane Kendrick, is attending Bay State College and wants to be a social worker. Justice Sharpe has just come from working for the youth program Artists for Humanity. Ayendai Smith is excited about starting Year Up in the fall, a program that will train him for a career in technology.

It is a beautiful, warm evening, a tranquil scene with young people sitting on the church steps talking and kids playing basketball in the park across the street. It's hard to



Mo Barbosa facilitates the workshop on violence with neighborhood youth.

believe that the church is only a block or so away from the place where Jahmol Norfleet was killed—or that an hour later two kids, one just four years old, will be shot as they sit on a porch about six blocks away from the church.

Kendra, who worked on the staff of H.Y.P.E. this year, thinks summer programs can help to stop the violence. “It’s a really good way to get kids off the streets,” she says. “If kids don’t have anything to do, they find a way to get into something. But they come to our program and then they start looking up to good people.”

Kendra is one of the ‘good people’ the kids can look up to. She is in her second year at Salem State College, majoring in business, with a minor in criminal justice.

“I want to start a program to help people when they get out of jail,” she says. “I would help them get an apartment, if they need one, and a job. Even if they didn’t graduate from high school, they could get their GED. I want to be an advocate for people.”

When asked what motivates her, she speaks of Jahmol again. “If it wasn’t for what happened to Jahmol, I might not be as passionate. But I think even if it isn’t your family or your friend who gets killed, you should care about it anyway because it’s not hurting just them. It’s hurting the whole community.”



SUMMER SAFETY FOR AT-RISK YOUTH

The H.Y.P.E. program, a cooperative effort of City Mission Society and four churches, including Pleasant Hill Baptist Church, shepherded the creation of the video “Jahmol’s Vision for Youth Peace” last summer, and provided a safe place for youth this summer. It was just one of 70 organizations that received support to provide safe, supervised programs for city youth during the summer of 2008. A total of \$750,000 in grants was made available for summer programs.

This was the third year that funders, led by the Boston Foundation, made an investment beyond their usual support of summer programs to combat an increase in youth violence. In addition to the Foundation and its donors, support was provided by the United Way of Massachusetts Bay and Merrimack Valley, the city, state and numerous other funders.

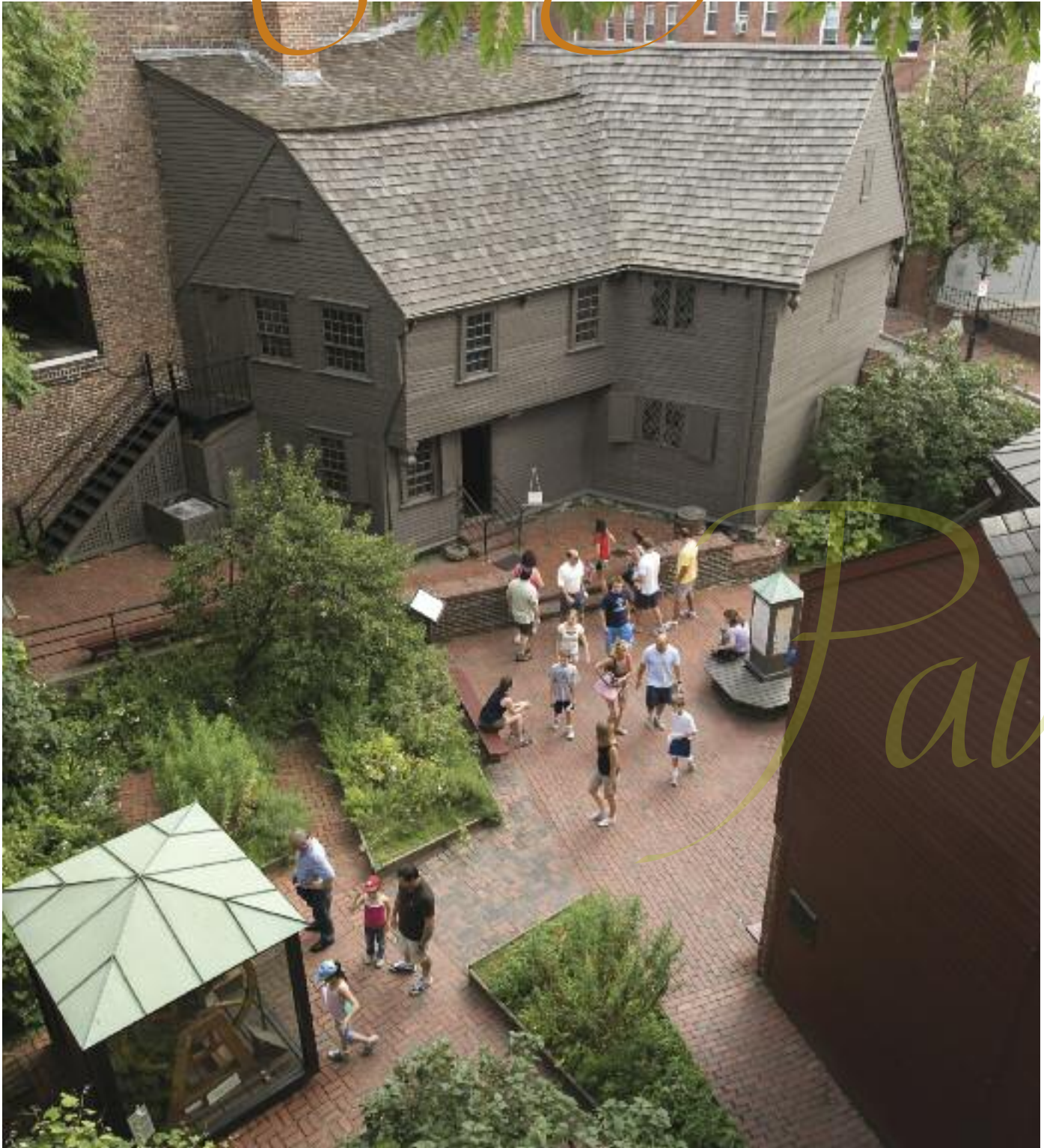
The Summer Safety program served an estimated 17,000 youth by making it possible for organizations with effective and popular programs to add days and hours to their schedules, especially on weekends, when concerns about the potential for violence is heightened.

Program funding was concentrated in neighborhoods with a history of summer violence, including the Dudley Square and Grove Hall areas of Roxbury, neighborhoods in the South End and Lower Roxbury, the Morton and Norfolk Street section of Dorchester, and the Bowdoin Street and Geneva Avenue sections of Dorchester.

Participants in the workshop on violence ranged in age from 11 to 23.

Revering a

Historic Gem



It is a glorious, sunny early morning in Boston's North End and eager visitors are lining up to gain access to the **Paul Revere House**—one of the most important historical sites in America.

A large group of French tourists is being lectured to by their guide about the importance of “Monsieur Revere” to l’histoire des Etats Unis.” Seated in a park across from the house, 30 or so children from across the country—members of the National Young Leaders Conference—are struggling with answers to the questions their teacher is asking about the nature of heroism and whether one should do “great things” even if there is no promise of recognition. She is referring, of course, to the riders who were not featured in a famous poem by Longfellow. Now the gate is open and the children eagerly flow into the grounds of the House to step back in time, and begin their tour.

The Paul Revere House, visited by some 250,000 people every year, is at once an intimate presentation of a colorful patriot’s home and an important point of reference for truly understanding the layers of American history and the



history of the North End. But the Paul Revere Memorial Association, celebrating its 100th anniversary this year, has been frustrated by the limitations of its physical plant—lacking such basic amenities as restrooms and drinking fountains. Now, thanks to the Massachusetts Cultural

THE MASSACHUSETTS CULTURAL FACILITIES FUND

The Boston Foundation has been a lead advocate of the Fund which promises to transform the Revere House. The Foundation co-chaired the Massachusetts Campaign for Cultural Facilities and sponsored seminal research on the extensive infrastructure needs of the state’s cultural institutions—which threatened to undermine the competitiveness of the state’s essential tourism industry.

To date, some 120 cultural organizations from across the Commonwealth have received grants totaling close to \$30 million to rescue their crumbling structures and mend their frayed infrastructures. Recipients run the gamut from small neighborhood-based cultural institutions to large museums and theaters. In addition to state funds, more than \$575 million has been leveraged to date—and the House, Senate and Governor have included the funds in their FY09 budgets.

Facilities Fund and a planning grant from the Boston Foundation, the Association has completed the initial phase of renovating a recently purchased building conveniently located behind the Revere House. Working from a Master Plan by Fennick McCredie Architecture, the expanded site will provide all of the needed facilities and space for educational programs.

Nina Zannieri, who has directed the Association for 20 years, is thrilled by the plans. “For the staff and for the hundreds of thousands of people who visit the House every year,” she says, “this project will be literally transformative.”

THE CIVIC CONSEQUENCES OF
CRIMINAL RECORDS



Jennifer Joseph was thrilled when her training as a phlebotomist led her to a full-time job at a major Boston hospital. Phlebotomy, the therapeutic practice of drawing blood, is one of a number of allied health professions that provide good jobs for workers and are crucial to keeping the city's health care institutions functioning. Her boss loved



CORI reports can be very hard to decipher for the untrained eye. For instance, the letters **DISM** represent the all-important information that the charges were dismissed.

REFORMING CORI

In addition to supporting the Massachusetts Law Reform Institute for its work with clients who have CORI reports, the Boston Foundation has helped to stimulate the larger debate. In January of 2008, Governor Deval Patrick issued an executive order and filed legislation on CORI that was informed by two *Understanding Boston* reports, the latter titled *CORI: Opening the Doors of Opportunity*, and a blue-ribbon task force. Both reports and the task force were joint projects of the Boston Foundation and the Crime and Justice Institute.

The executive order and bill featured many of the major recommendations from the reports, such as expanding the Criminal History Systems Board to include a workforce development component and educating the public about CORI. The Governor's FY09 budget also earmarked \$346,000 for new CORI training.

"The Boston Foundation's task force helped to bring the economic imperative of CORI reform into sharp relief," says Suzanne Bump, Secretary of the Massachusetts Office of Labor and Workforce Development. "It also helped to inform the Governor's executive order that reduces unfair biases against otherwise qualified ex-offenders and strengthens the pool of applicants for jobs in the Commonwealth."

Attorney Fran Fajana explains the confusing notations on a CORI report at the offices of Massachusetts Law Reform Institute.

her work and the job came with benefits, including the all-important health insurance that Jennifer, a single mother, needed for herself and her two children. "They called my work 'stellar,'" she says.

Two weeks later, Jennifer was stunned when her boss abruptly fired her because her "CORI" had come in. CORI stands for the state's Criminal Offender Record Information system, an important public safety tool that in recent years has come under scrutiny for its frequent use by employers and public housing landlords. Jennifer's CORI included a welfare violation and misuse of a credit card. She had made restitution for both, but the charges remained on her CORI. Jennifer found her way to Fran Fajana, an attorney who works at the nonprofit Massachusetts Law Reform Institute. Fran's primary focus is on the civil consequences of criminal records, which disproportionately impact low-income people and people of color, like Jennifer. Despite intervention by Fran, the hospital responded that it had a firm policy about hiring people with CORIs.

"My clients struggle day in and out to repair mistakes or omissions that they made," she says. "Except for being low-income or poor, some of them might not even have a CORI."

Today, Jennifer has two part-time jobs. "I thank the Lord for that, but they don't offer health insurance," she says. She admits to feeling hopeless sometimes, but will not give into it. "Once you feel hopeless," she says, "your kids can tell and it affects their ability hope."

WARRIORS ON THE HOMEFRONT

Homeowners, tenants and grassroots activists wage anxiety-ridden battles to keep their families and neighborhoods intact

In January of this year, Hildreth Brewington was about to be evicted from his home of 13 years—a modest two-family house on Wheatland Avenue in Dorchester where he'd planned to live for the rest of his life. "I had packed everything into boxes and had the furniture all ready," he says. When asked where he planned to go, he replies: "I don't know. I didn't have anywhere to go."

Hildreth, who is 68, has a genetic condition called retinitis pigmentosa that has left him legally blind. "A niece of mine took advantage of me," he explains. "She signed my name and refinanced my house behind my back for \$365,000 and took \$155,000 for herself. I don't know how she convinced the bank, but she did. My monthly mortgage payment went from \$1,000, which I could handle, to \$2,500, which I could not. The next thing I knew my house was foreclosed on and I was going to be evicted. I tried to renegotiate the mortgage, but the bank wouldn't settle for anything but a pre-approved loan of \$491,000, which was way beyond my means. Then I saw City Life on the evening news and I called them. Thank God for City Life."

He is referring to City Life/Vida Urbana, a grassroots nonprofit organization that was created in Jamaica Plain in 1973 by a group of activists dedicated to the belief that local residents, when organized, can significantly improve their own lives. Today, the group's motto is: "Building solidarity to put people before profit." And its staff is on the front lines of the foreclosure crisis.

"There is little question in my mind that the predatory lending atmosphere we've been seeing contributed to Hildreth's situation," says Steve Meacham, a tenant organizer for City Life. "All sorts of alarms should have gone off for the bank as that loan was being considered."

The staff of City Life believes that keeping people in their homes is not only good for the homeowners, but also for neighborhoods and the community as a whole, and they try everything from human blockades to savvy legal strategies to stop eviction proceedings.

Hildreth Brewington is fighting to stay in his home of 13 years.





Hendry Street in Dorchester has been devastated by the foreclosure crisis.

COLLATERAL DAMAGE

Another story from the files of City Life reflects the ‘collateral damage’ that can take place when an absentee landlord is foreclosed on and the tenants of the foreclosed building end up paying the price—which is exactly what happened to Abigail Lugay and her family.

Abigail came to the Boston area from Trinidad 21 years ago to build a life for herself and her family. A divorced mother of four and a worker in the low-paying field of day care, she has struggled to house, clothe and feed her children, especially since her last child was born through a cesarean section that left her unable to work for a while. Renting a home on the first floor of a triple-decker in Dorchester, with family members occupying the other apartments, created a support system that made life possible.

Then one day, she and her family received the first of a string of letters from a bank letting them know that their building, which is owned by an absentee landlord, was in foreclosure. After the initial panic that sets in when anyone’s home is in jeopardy, the family began to discuss the possibility of buying the building themselves. “Because the building

One of the most common and effective tactics City Life uses is to call for properties that have been foreclosed on to be appraised. In most cases, the appraised value comes in far lower than the current mortgage. Hildreth’s house was appraised for just \$209,000, which puts it back into a range that he could afford. As of the publication of this annual report, he was still trying to renegotiate a loan with another bank, although the bank wants more than he can afford, but he is optimistic that things will work out. He feels that his misfortunes are “just a part of life.” He adds, “You can’t worry all the time. You have got to have hope.”

In a remarkably civil act of civil disobedience, City Life/Vida Urbana’s Steve Meacham led a blockade in an unsuccessful attempt to keep a woman named Paula Taylor in her Roxbury home.



STABILIZING NEIGHBORHOODS

In addition to supporting nonprofit organizations that help tenants facing eviction, the Boston Foundation has taken a lead role in addressing the devastating impact of the foreclosure crisis on neighborhoods across the state through the **Neighborhood Stabilization Loan Fund**—a \$22 million public-private partnership that was announced by Governor Deval Patrick in July.

The Fund will be used to purchase foreclosed properties clustered in low-income areas in seven communities across the state, including Boston. The Foundation has contributed \$2 million to the fund in the form of a Program Related Investment. The effort was sparked by the fact that foreclosures have been concentrated in specific neighborhoods, resulting in abandoned properties that attract vandalism and drug dealers—resulting in a lowering of real estate values of nearby properties.

The Foundation also made a \$200,000 grant to Boston **Community Capital**, a community development intermediary to support its neighborhood stabilization program and is harnessing the power of the **Commonwealth Housing Task Force** to move promising solutions to the foreclosure crisis through the legislative process.

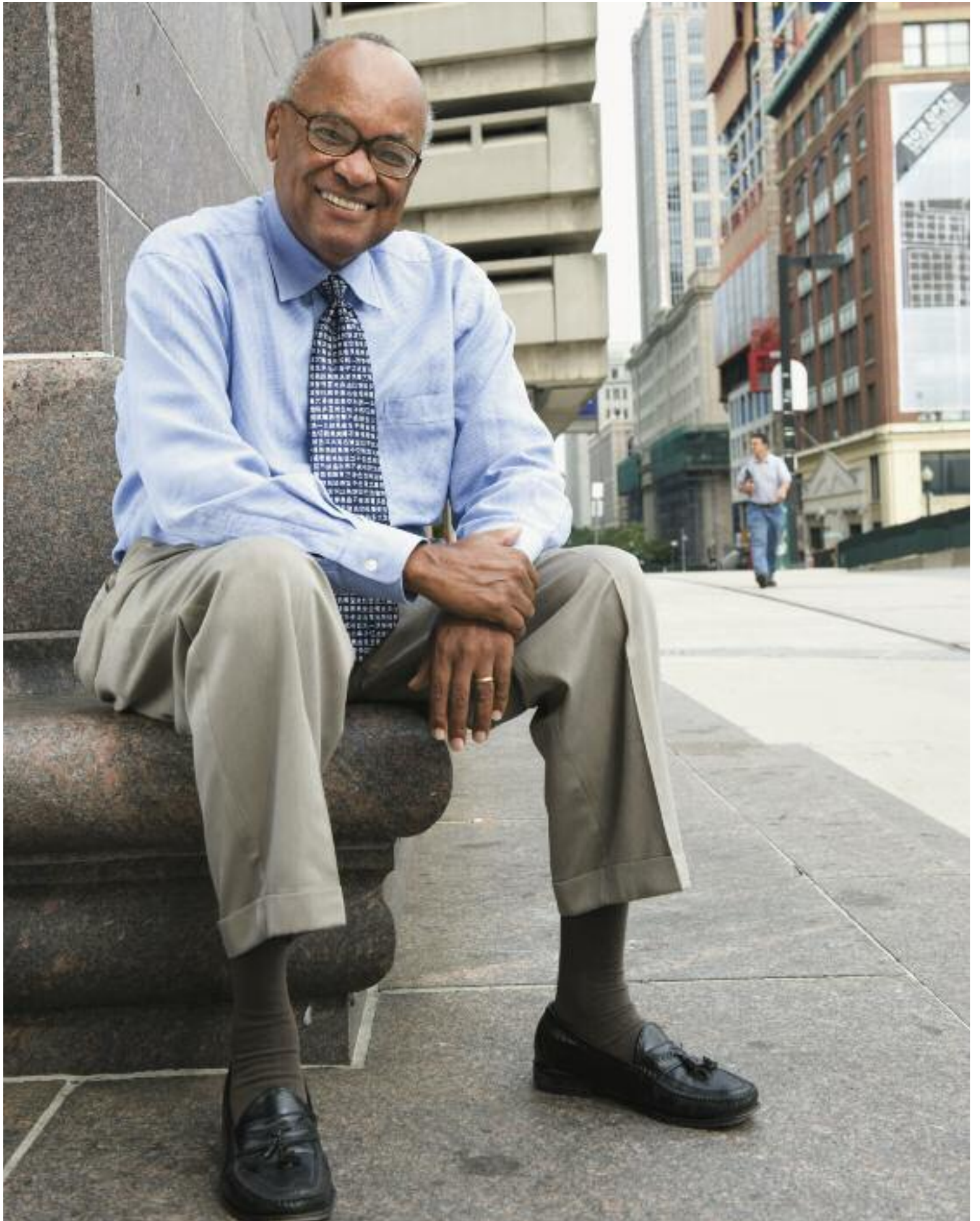
really needs a lot of work,” she explains, “we thought it just might be something we could afford. But then we found out that the bank wanted \$400,000 for it! We knew it wasn’t worth that much.”

Abigail and her family decided to find out what the building really was worth. “We were very excited when a new appraisal of the building came in at just \$176,000, but the bank wouldn’t budge,” says Abigail. Even more valuable than the appraisal was the advice the appraiser gave them. “He said ‘I know people who can help you,’” she explains, “and suggested that we go to City Life.”

City Life organized a blockade, which kept the family in the building, but life after the eviction notice was hard. “For a year and a half, we were in limbo,” says Abigail, “with a revolving cast of real estate agents and attorneys—and multiple court dates.” But this story has a happy ending. Abigail is back at work and the bank accepted her family’s offer to buy the house. In response to this favorable turn of events, Abigail echoes Hildreth’s statement—“Thank God for City Life.”

Abigail Lugay’s story has a happy ending—the bank has accepted her offer to buy the building in which she and her family are tenants.





HUBIE JONES

MENTOR AND PHILANTHROPIST

If you have a promising idea for a new initiative that will benefit Boston's children or the arts, most likely someone will tell you to go and ask Hubie Jones for advice. If you do, be ready for his first question: "Who are you collaborating with?"

"I know from experience that you can go farther and faster than you could possibly go on your own," he says. That knowledge stems from decades of experience in the early stages of numerous nonprofit efforts—most recently, his beloved Boston's Children's Chorus, which he launched in 2004—and from mentoring literally dozens of social entrepreneurs.

"Passing on whatever wisdom I have to the next generation is probably the most important work I do right now," says Hubie from the sleek year-old building on Columbus Avenue that serves as the headquarters for City Year. He has an office in the building because one person who sought his advice many years ago—back when Hubie was Dean of the School of Social Work at Boston University—was Alan Khazei, a co-founder of City Year.

"Alan had graduated from Harvard Law School, and he and Neil Silverstein came to me to ask my advice about an idea they had to start an urban youth corps," explains Hubie. "I'm thinking 'I'll give them about 15 minutes.' Well, two hours later, we wound up our conversation about what this idea could be."

Although he refused to join the board of City Year—saying "I'm already on too many boards"—he said he'd be happy to talk with Alan



THE HUBIE JONES FUND

Through the Hubie Jones Fund at the Boston Foundation, which was established after a testimonial dinner held for him by Massachusetts Advocates for Children in 2004, Hubie has funded some 25 Boston-area nonprofits. "That fund was an extraordinary gift to me," he says, "because it has given me the opportunity to help fund nonprofits I care deeply about." The first and largest grant went to the Boston Children's Chorus.

regularly. Since that the first meeting, he has seen City Year go from a great idea to a \$50 million organization with branches in 19 locations, including South Africa. He was, in fact, the one to encourage City Year to "go national," but only when he thought it was ready. "I knew that Clinton was going to win the Presidency and that he would launch a national youth service corps if they didn't," he

says. Ten days after he made the suggestion, Alan and company returned to Hubie and said, "You're right. We're going national and here's our plan. Now will you join our board?" He finally agreed.



Hubie Jones advised the founders of City Year—and, when the time was right, suggested that it go national. Today, City Year is in 19 cities, including South Africa.

*Life is Back on
Carson
Beach*





It is low tide on Carson Beach in South Boston on the first day of August in the early evening. A man and woman, holding hands, meander lazily along the expansive water’s edge. In the distance, a plane noses down over Dorchester Bay, beginning its approach to Logan Airport.

Quiet as it is along the shoreline, life is teeming near the beach’s recently restored McCormack Boathouse, as more than a hundred families gather for Early Books Night, a literacy-based program of South Boston Neighborhood House. Tonight’s main attraction is a highly participatory reading of *Winnie the Pooh*—copies of which are handed out after the program.

“The South Boston program is one of my favorites,” says Bruce Berman of Save the Harbor/Save the Bay, which received a grant of \$100,000 from the Boston Foundation to implement the recommendations of the Metropolitan Beaches Commission (see sidebar). Among other efforts, the funding supports creative programming on the city’s beaches.

Carson Beach is just one of a string of 14 beaches in nine Boston

Senator Jack Hart with three of his four daughters at Early Books Night on Carson Beach. (Behind him, from left, are Emily and Kathleen; in front is Mary Kate.) “Some of my fondest childhood memories are of the times I spent on this beach,” he says. “The public beaches from Nantasket to Nahant were our Cape Cod.”



area communities spanning 15 miles. These remarkable public resources have the power to attract and connect

more than one million people who live within a half hour of the shoreline.

The popular reading program on Carson Beach is just a glimmer of the potential that all of these beaches have—not only to serve as recreational and educational resources, but to reinvigorate a powerful sense of place—and of community.

(Above) *Winnie the Pooh* was the featured book during Early Books Night on August 1st.

METROPOLITAN BEACHES COMMISSION

The transformation of Boston Harbor and Massachusetts Bay from one of the filthiest bodies of urban water to one of the cleanest is a great environmental success story—but the quality of the area’s 14 beaches has not kept pace. That is all changing with the recommendations and advocacy of the Metropolitan Beaches Commission, funded in part by a \$50,000 grant from the Boston Foundation to Save the Harbor/Save the Bay. Boston Foundation President and CEO Paul S. Grogan serves on the Commission, which is led by Senators Jack Hart and Anthony Petrucci and Rep. Kathi-Anne Reinstein. The group held public hearings in beach communities from Lynn to Hull—all with the goal of helping the beaches reach their full potential as sources of beauty and of pride. Thanks to its efforts, \$2 million was included in the state’s 2008 budget for the beaches.

A B L U E P R I N T F O R

World Class Health

Armed with data and a blueprint for action, seasoned and new leaders are choosing 'health' over 'health care'

In 1996, Rebecca Onie was a pre-law sophomore at Harvard when she called the legendary head of pediatrics at Boston

Medical Center, Dr. Barry Zuckerman, and proposed launching something that eventually would be called Project HEALTH. She had been volunteering as an intern at Greater Boston Legal Services and was frustrated by the limitations of the work.

"I was trying to help people who were getting evicted because they had to choose between their HIV meds and their rent," she explains. "And I saw kids who had asthma because of the cockroaches, mold and mildew in homes that their families couldn't afford to leave." Basically, she was seeing the link between health and many of the other problems families had.

She asked Dr. Zuckerman if there might be a role for young people in addressing the frustrations doctors were experiencing when treating children who had so many



problems, medical and otherwise, that it was hard to know where to start.

Together they started Project HEALTH,

which uses college undergraduates as volunteers to staff a Family Help Desk, strategically located in medical clinics treating families and children. The idea is to help families head off poor health and chronic diseases, by accessing the community resources they need to be healthy. The Program, which has received close to \$400,000 in Boston Foundation funding over the last five years, is so attractive to pre-med

(Above) A new generation of leadership in health promotion is represented by Rebecca Onie, co-founder of Project HEALTH (left), with Porsha Eden, a Wellesley undergrad, who volunteers for the Project. Porsha's future goal is to promote health in the Dorchester community where she grew up. (Opposite page) Project HEALTH refers kids to a program called Brandy4Kids, run by Brandy Cruthird (left), an All-American basketball star who won a scholarship to college, and eventually returned to Roxbury, where she grew up, to open a fitness center.



Rishi Shukla, who once considered becoming a doctor, is attending Harvard Business School with the goal of strengthening his capacity to impact major public health challenges.

and other college students that today it can accept only 15 percent of those who apply to volunteer.

One of those volunteers, Rishi Shukla, had planned to go to medical school, but was so inspired by his work with Project HEALTH—and his subsequent work with Dr. Zuckerman at Boston Medical Center—that he has become a champion of preventive health for children.

“I realized that I couldn’t have the social and public health impact I wanted to have as a doctor,” he says. Rishi teamed up with another young man, Jason Langheier, and became a founding member of Fitness Forward, which has received \$80,000 in Boston Foundation funding over the last few years. The organization uses health education, web tracking technologies,



social marketing and incentives to motivate kids to lead healthier lifestyles, rewarding them with items like Red Sox memorabilia for achieving health behaviors.

“In every kind of social change movement, you have to have very strong leadership,” says

EMC’s Delia Vetter with two EMC employees (from left, Amir Sharif and Scott Cote), who monitor their blood pressure through the SmartBeat program.



Wendy Everett, President of the New England Healthcare Institute (NEHI), and a major health leader in her own right. Last year NEHI published a landmark Boston Foundation study on health in Boston called *The Boston Paradox: Lots of Health Care, Not Enough Health*, which shocked many people with the news that Boston, arguably a global leader in health care, has a population that is not much healthier than other American cities, with high obesity rates and bad habits that are leading to a myriad of chronic health problems.

Now NEHI is working with the Boston Foundation to develop a Health Leadership Task Force as part of a statewide Blueprint for Action called *Healthy People, Healthy Economy*—based on the premise that if preventive health doesn’t take front and center, and soon, our economy will be overwhelmed with the growing cost of health care. “It’s not enough to expand access to health care and try to control costs,” says NEHI’s Tom Hubbard, who co-authored the Blueprint as well as *The Boston Paradox*. “We have to reverse trends that are making us unhealthy.”

A major section of the Blueprint focuses on the employer community, which has a big stake in the health of their employees, in part because of a rapidly aging workforce.

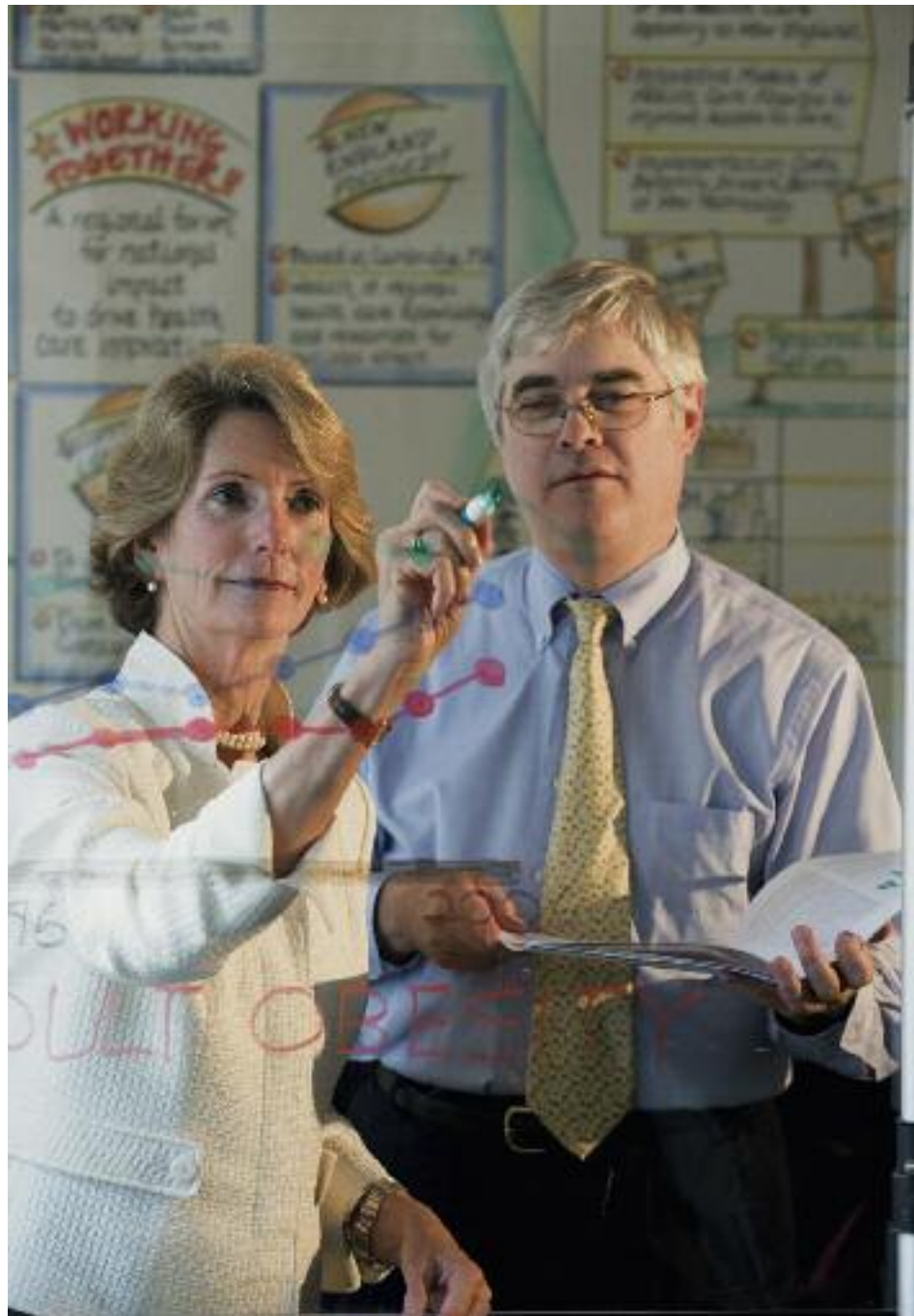
NEHI's Wendy Everett and Tom Hubbard are working closely with the Boston Foundation to change health policy and provide people with the knowledge, information and evidence they need to improve health status.

One model program NEHI points to is EMC Corporation, the world's leading developer and provider of information infrastructure technologies and services, with U.S. headquarters in Massachusetts.

"There is a phenomenal captive audience in businesses," says Wendy Everett. "The goal is to structure the worksite so that people have opportunities to get up and move around, are offered different food choices and access to health screenings. EMC is a great model."

One EMC program, called SmartBeat, a collaboration with the Center for Connected Health, which is a division of Partners HealthCare, evaluates how employees with hypertension or pre-hypertension can better manage their health through proactive monitoring and education. The unique web-based program designed by the Center uses a wireless blood pressure cuff and an Internet-based feedback system to aid EMC employees.

"This program is a natural extension of our strategy to promote a healthy workplace and drive innovation through new health technologies," says Delia Vetter, Senior Director of Benefits at EMC. "Ultimately, all of our efforts, including providing a gym on site, are meant to help employees



connect the dots between healthy habits and health."

Wendy Everett wants more companies to follow their lead. "In Massachusetts, we think of ourselves as a national leader, with world-class health care," she explains. "Let's create more programs like Project HEALTH and SmartBeat so that, eventually, we can begin to think of ourselves as the national leader with world-class health."

FROM KOSOVO TO BOSTON

Dafina's Journey TO HER Future



THE ALLIED HEALTH WORKFORCE INITIATIVE

The Organizational Development & Training program at Boston Medical Center is supported in part by the Boston Foundation's Allied Health Workforce Initiative. Launched in 2007 as a three-year \$1.5 million initiative, the Foundation is partnering with Boston hospitals to invest in the development of current workers—and to address the critical shortage of allied health professionals in the state.

The Foundation's approach is to build on investments hospitals already are making in workforce development to create a 'pre-allied health educational pipeline' that helps people advance into careers that have a promising future.

Dafina Kozmaqi has wanted to be a pediatrician since she was a little girl living in the Kosovo. The story of her journey toward that dreamed-of future begins in 1999 when she and her family—along with thousands of other ethnic Albanians who were being brutally attacked by Serbian forces—fled to Macedonia. Just 10 years old at the time, Dafina remembers her family leaving with little more than the clothes on their backs—and then being offered the choice of moving to Australia or America.

"We picked America," says Dafina. "My parents, my sister, two brothers and I came to Lynn, Massachusetts. We lived there for about a year and then we moved to Roslindale." Dafina attended the R.G. Shaw Middle School and then West Roxbury High School for two years, but decided to transfer to an innovative small high school called PATH (Parkway Academy of Technology and Health), because it prepares its students for careers in the health sciences and biotechnology.

Through PATH Dafina had an internship at Boston Medical Center (BMC) in the OB/GYN Department. She served as a Medical Assistant, learning to take vital signs, interacting a little with patients, and experiencing, in her words, "what it would really feel like to be a physician."

She graduated from high school in 2007 and, after a stint at the Boston Health Commission, returned to BMC to work in Patient Registration, where, as an entry-level employee, she has access to some of the most extensive learning resources offered by any hospital in the area.

Dafina Kozmaqi with instructor Steve Yanovsky, who provides skill-based career training for employees of BMC. "My goal is to help my students succeed in a college setting," he says. "I instill some basic knowledge, but more importantly, I stimulate them to have faith in their own ability to learn."

"Dafina understands that becoming a pediatrician is a long-term goal," says Kate Hurd, who works with hospital employees to design an educational plan that meets their needs. "We decided together that she should take the prerequisites she'll need to pursue a career in Allied Health as the first step in her educational journey." Among the educational resources offered by BMC are Adult Basic Education, English as a Second Language, and Health Care Career courses.

By taking advantage of these resources, Dafina has built a foundation of health care knowledge that will help her prepare for the next phase of her education. Early in 2009, she will start taking classes in Ultrasound Technology at Bunker Hill Community College. The first time this energetic and intelligent young woman sees a baby on the screen of an ultrasound machine, she will know that she is one step closer to her dream.



A GREEN LIGHT FOR SOCIAL INNOVATION

Education, youth development, health care. These and other issues that have a profound impact on Boston's families and children are at the heart of the philanthropy of Boston Foundation donors John and Susan Simon. They are also the issues that inspired John to co-found the GreenLight Fund in 2003, an ingenious organization that locates high-impact nonprofits in other cities and replicates them in Boston. The group's other founder, Margaret Hall, serves as its hardworking executive director. From its earliest days, GreenLight has partnered with the Boston Foundation in almost every way possible.

"First, we rely on the Boston Foundation to help us identify local needs," says John. "The Boston Indicators Project, with its wealth of knowledge, is invaluable in that process. Then, the Foundation connects us with community foundations in other cities to search for great nonprofit organizations that we can replicate here. Finally, the Foundation is the perfect place to start networking when we're searching for an executive director who can take a great idea and build a local organization around it."

For its part, the Foundation has been so impressed with the GreenLight Fund's work that in 2005, it made a grant of \$400,000 to help the organization meet a challenge



from the Tudor Foundation, giving it a key component of the resources it needs to support the organizations it replicates for their first three years.

Of the four new nonprofits already launched by GreenLight, Susan Simon has gotten directly involved in one in particular. Called "Friends of Children—Boston," it replicates a concept launched in Portland, Oregon that

matches vulnerable Boston school children with adults who will stick with them for their entire educational experience. Susan and her family are "Family Friends" with a little girl named Angelica.

"Angelica is going into the fifth grade now," says Susan, "and she's a delight. She helps our kids learn a little Spanish and I hope we're exciting her interest in new things." Friends of the Children has had remarkable success in other cities across the country, with close to all of participating children staying in school and staying out of trouble.

(Above) John Simon also co-founded The Steppingstone Foundation, a nonprofit organization that provides educational opportunities to inner-city students. (Opposite) John and Susan Simon have a Donor Advised Fund at the Boston Foundation. "We love being part of the Boston Foundation community," says John.





F O R T H E

Whole Child

Allston's Gardner Academy has 15 community partners, offering children and families everything from exercise and arts enrichment to health and dental services



The Gardner Pilot Academy, an elementary Pilot School serving one of the most culturally and ethnically diverse communities in Boston, is far more than an educational institution to the Barrios family—it is a community that has embraced all of the children and even the parents. Since the mother, Sandra Barrios, came to the United States from Guatemala eight years ago—two years after her husband, Deni Barrios, Sr., arrived here—all of their children have attended the Gardner. Daughters Marian, Debbie and Jennifer graduated from the school and now attend the Boston Community Leadership Academy, a Pilot High School. The two younger children, Sheila and Deni, Jr., are in the second and third grades at the Gardner.

The father, Deni Sr., who works in an aluminum factory, has taken English classes at the school during the evening hours; the mother, who is a house worker, has taken advantage of cooking classes; and the children have participated in a host of extracurricular activities from after-school

programming to summer camp. All seven family members stroll the Gardner's wide corridors as if the school is a second home—and are quick to praise the changes they have noticed since it became a Pilot School a little over one year ago.

"The classes are smaller and more attention goes to the children," says Sandra. Deni, Sr. adds, "The teachers collaborate with the parents. It feels like a real community here. This school has given us so much—we cannot say enough good things about the Gardner."

The Gardner's principal, Erica Herman, is quick to praise them in return. "Every time we ask for parental participation in anything regarding their children or the school, Mr. and Mrs. Barrios respond immediately and enthusiastically," she says. "They're wonderful parents and their children are a reflection of them."

The challenges the Barrios family have, as immigrants to the Boston area, reflect those that many of the Gardner's students and families face. More than 70 percent of the school's 340 students live in homes in which the primary

Principal Erica Herman surrounded by some of the school's children.



The Barrios family at the Gardner one recent Friday afternoon. From left: Deni, Sr., Sheila, Jennifer, Deni, Jr., Debbie, Marian and Sandra. All five children have attended the Gardner. Sheila and Deni, Jr. are in the second the third grades, respectively. The three older girls graduated from the Gardner and now attend Boston Community Leadership Academy (BCLA). They chose BCLA because it is also a Pilot School.

with what Erica calls “tremendous support” from the Boston Foundation, it opened as a Pilot in 2007.

“The Gardner also transformed itself from a traditional school to a ‘full service’ school,” says Erica. “This means that we pay close attention to each individual child and we proactively address the challenges they face, in school and in life. We meet our students where they are—and we are passionately dedicated to taking them to the next level.”

PILOT SCHOOLS

The Boston Foundation has been a leader in the Pilot School movement, funding a number of schools to explore the Pilot model and then supporting those schools that vote to become Pilot Schools for their initial year. In 2008 alone, the Foundation made grants ranging from \$18,000 to \$20,000 to 19 different schools.

Pilot Schools were created in 1994 through a collective bargaining agreement between the Boston Public Schools and the Boston Teachers Union (BTU). Pilots remain part of the district—and staff members retain BTU membership—but the schools are exempt from most central office and union requirements, and are free to make their own rules at the school level. As a result, Pilots have greater control over budget, staffing, curriculum, assessment, governance and schedule than do traditional district schools.

language spoken is not English. For the Barrios family’s older children, starting school in a new country was a frightening prospect, although it was easier for them to become fluent in English than it has been for their parents.

Principal of the Gardner for four years, Erica Herman was determined to convert the Gardner to a Pilot School, an innovative educational model which allows for more autonomy than other Boston public schools have—offering flexibility in class size, school hours and the curriculum. But the school fell victim to a moratorium placed on the opening of new Pilot Schools and spent three years in limbo. Finally,



Deni Barrios interacts with a Gardner teacher.

Tufts Dental School to offer a full range of health services.

“It’s just common sense that offering ‘wraparound’ services for children and their families is the best way to address the needs of the ‘whole child’,” says Erica, who locks the fingers of both of her hands to represent the seamless array of services offered by the school. “We can see how this approach is working with our kids and their families, and we’re even improving academically. Our MCAS results went up in English Language Arts last year and our classroom assessment data in fluency and reading comprehension have improved dramatically.” She adds: “We know that, with the challenges our kids face, our journey to excellence won’t happen overnight, but it will happen. We’re a school on the move.”

With the conviction that “schools alone are not enough,” the Gardner has accepted and sought numerous partnerships with other community institutions. It has taken advantage of Boston Connects, which supports strong relationships between parents, schools, community agencies, universities and businesses in the education of Boston’s children. And the school has particularly close partnerships with Boston College, Boston University, the Central YMCA, Harvard University, Harvard Business School, and the Sports4Kids program.

The school approached Young Audiences to add artistic instruction and experiences to its curriculum—and, as a result, every Friday morning is devoted to the arts, with creative people working in all media, from dance and music to the visual arts, visiting the school and working with the children.

The Gardner is even home to a branch of the Joseph Smith Community Health Center, so that children and families can receive health care on site, and has a partnership with the Brighton-Allston Mental Health Association and



Sheila Barrios wants to become a teacher when she grows up.

All Together Now

When two respected nonprofit organizations merge, the whole becomes more than the sum of its parts

It began with an idea—the idea that coming together could make two nonprofit organizations stronger and even more effective than they could possibly be on their own.

The two organizations, Dorchester CARES and the Family Nurturing Center of Massachusetts, were founded by the same visionary woman. Sharon Shay Workman

launched the Dorchester CARES coalition in 1989 in response to research showing that child abuse and neglect was more prevalent in communities with high levels of economic stress and few social supports. Her innovative solution to the problem was to bring together community residents, parents and human service organizations to develop a powerful network of supports for families—a “Circle of Caring,” as she called it.

This Circle of Caring connects families to each other



and to the wider web of community resources. It operates through a lengthy menu of strength-based programming, like “Welcome Baby,” which reaches out to families with newborns, and “Nurturing Programs,” based on a proven model for parenting support and education.

Family Nurturing Center of Massachusetts (FNC) was launched six years later, with

the intention of taking the successful model of family support that Sharon had developed through the Dorchester CARES coalition—and spreading it to other communities.

(Above) The Welcome Baby program identifies expectant families and begins a relationship with them by delivering a basket full of helpful items, including a blanket or quilt made by a community member and a list of neighborhood resources. (Opposite) Families participate in an FNC nurturing program in Allston that connects them with the supports they need to thrive.





With a common mission, FNC and Dorchester CARES quickly formed a strategic relationship, developing programs together, engaging in joint fundraising campaigns—even sharing the same building at 200 Bowdoin Street in Dorchester.

One element, however, distinguished the two groups: FNC had established itself as a nonprofit organization with its own 501(c)(3); while the Dorchester CARES Coalition operated through a fiscal agent. In rocky economic times like these, when the fiscal health of nonprofit organizations is being tested, that difference would prove key to the survival of the two organizations.

As government funds for the reimbursement of services were tightening over the last few years, the staff of Dorchester CARES was finding it difficult to raise the unrestricted funds they needed for the overall health of their organization. They decided to apply for their own nonprofit status, and created a strong board of directors, but found themselves struggling

through a series of unanticipated leadership and administrative changes.

“I received a phone call from their board chair, Jo-Anne Ochalla, exploring a possible merger,” says Phyllis Menken, FNC board chair. While there had been previous conversations over the years about merging, the timing had never been right and there was concern about taking on the fiscal challenges of the Dorchester CARES coalition. But after numerous meetings and a meticulous planning process, supported by a \$5,000 Vision Fund grant from the Boston Foundation, the merger went through on July 1st of 2008.

“Their staff had been trained in the same nurturing philosophy as ours,” adds Phyllis, “and they had created so much wonderful ‘community capital’. It was clearly the smart thing, and the right thing, to do.”

(Above) Family Nurturing Center of Massachusetts makes home visits to families.

With the merger accomplished, the newly-combined staff and board of both organizations came together for a barbeque in Phyllis's backyard this summer. The founder of both organizations, Sharon Shay Workman, who had moved back to the Midwest where she was raised, flew to Boston to join them. Together, they all celebrated the merger and reaffirmed their invaluable life's work—welcoming babies into communities and connecting families to the resources and support they need to thrive.

Matt LiPuma, the Executive Director of Family Nurturing Center of Massachusetts, helped to guide the merger process.



FISCAL FITNESS FOR NONPROFITS

Merging is just one of the strategies suggested for struggling nonprofits in a landmark study released by the Boston Foundation in June of 2008. *Passion & Purpose: Raising the Fiscal Fitness Bar for Massachusetts Nonprofits* celebrates the crucial role the sector plays in the state and contains a vast amount of detailed information—but also issues a ‘call to action’ designed to address financial and organizational weaknesses.

It makes the point that in recent years, the number of public charities in Massachusetts has virtually doubled, despite almost no growth in the population or, even more critical, funding sources—with some 40 percent of the state's nonprofits losing money every year. Underfunded, overstretched and vulnerable to cuts by a state government that faces increasing financial constraints itself, the nonprofit sector is in peril today. Organizations that rely heavily on government reimbursements for services provided are in particular jeopardy.

The report does far more than addressing the fiscal chal-

lenges facing the nonprofit sector. It also underscores the vital civic, economic and social role of Massachusetts's 36,000 nonprofits, which generate \$87 billion in revenues annually, represent \$207 billion in assets, and employ close to 450,000 workers.

It divides nonprofits into three broad categories. The first is “Grassroots,” representing small groups with budgets of \$250,000 or less and missions that encourage civil society through action and volunteerism. The second category is “Safety Nets,” or organizations with budgets between \$250,000 and \$50 million that provide crucial services to the state's residents. The third is “Economic Engines,” or large institutions with more than \$50 million in annual expenses that contribute to the overall economic health of the entire region. Family Nurturing Center of Massachusetts falls into the Safety Net category, which describes a group of organizations that are crucial to the well-being of the state's families and neighborhoods. For the full report, go to www.tbf.org, and choose *Understanding Boston*, then *Passion & Purpose*.

SELECTED GRANTS FROM 2008

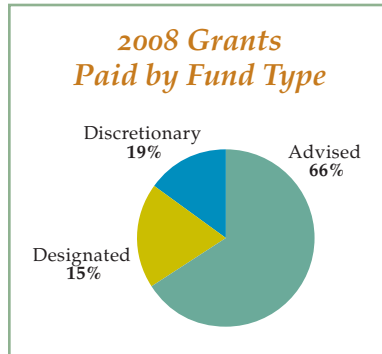
In 2008, the Boston Foundation and its donors made some \$78.7 million in grants to nonprofit organizations in the Greater Boston community and across the country. To convey the full breadth of this grantmaking, a representative group of selected grants from all funds—

Discretionary, Designated and Advised—are presented in the following pages, organized by broad categories. The Foundation’s Board of Directors authorizes all grants.

Selected Grants from Discretionary Funds

Discretionary Funds are the primary funds for which nonprofit organizations may apply. They include: the Permanent Fund for Boston, which is the largest unrestricted fund and has been built by hundreds of civic-minded Bostonians over the

years; Named Funds—often established to honor a notable person or organization; and Field of Interest Funds, created by donors who care deeply about a specific area of community life. Many grants are made from a combination of these different kinds of funds. In the following lists, we briefly describe the purpose of each grant.



The largest proportion of grant dollars from Discretionary Funds benefit the City of Boston (43%), or target Greater Boston as a whole (25%). Of Boston’s neighborhoods, the largest percentage of funds go to Roxbury, North Dorchester and Allston Brighton.

Another 12% goes to projects that benefit the entire state.

Selected Grants from Designated Funds

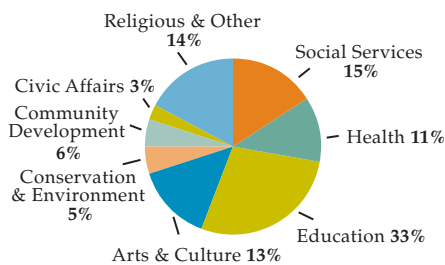
Grants from Designated Funds go to specific nonprofit organizations in keeping with the terms established by donors over the years. These grants provide annual support for many of the community’s most important institutions. There are no purposes listed for these grants because they are generally for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

Selected Grants from Donor Advised Funds

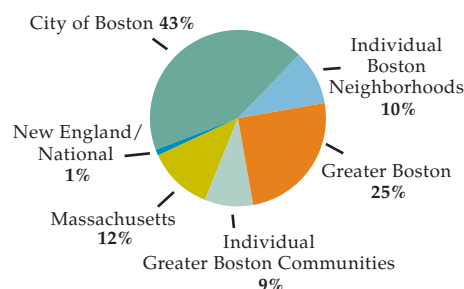
Donor Advised Funds are established by people who want to be actively involved in the grantmaking process. Many of these donors have a commitment to strengthening the Greater Boston community, and take advantage of the knowledge the Boston Foundation has about the issues that

are most pressing and the nonprofit organizations that are most effective. There are no purposes listed for these grants because they are generally for broad organizational support.

2008 Grants Paid by Program Area from All Fund Types



Geographic Distribution of Discretionary Grants



SOCIAL SERVICES

A total of **\$12,756,415** in grants was made in the area of Social Services.
Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

CRADLES TO CRAYONS, \$25,000

From the Permanent Fund for Boston

To strengthen and expand its civic engagement activities and strengthen partnerships with Massachusetts schools and youth-serving organizations

ELLIS MEMORIAL & ELDREDGE HOUSE, INC., \$50,000

\$32,000 from the Louis Agassiz Fund and \$18,000 from the Permanent Fund for Boston

For its Organizational Capacity Building Initiative designed to build development capacity in individual giving, board leadership and fundraising

MYSTIC VALLEY ELDER SERVICES, \$40,000

\$25,000 from the Frederika Home Fund and \$15,000 from the Helen & Marion Storr Fund

For a collaborative planning effort to improve access to transportation for elders and people with disabilities

WOMEN'S LUNCH PLACE, INC., \$25,000

From the Harcourt Family Fund

For organizational development efforts, including program evaluation and strategic planning

Grants from Designated Funds

AMERICAN RED CROSS OF MASSACHUSETTS BAY, \$7,569

Dana P. & Maude E. Simpson Memorial Fund

CRITTENTON HASTINGS HOUSE, \$10,959

Hastings-Plummer Fund

INQUILINOS BORICUAS EN ACCIÓN, INC., \$21,778

Jorge N. Hernandez Fund

MASSACHUSETTS SOCIETY FOR THE PREVENTION OF CRUELTY TO CHILDREN, \$11,155

Frank B. Thayer Fund

WEST END HOUSE BOYS & GIRLS CLUB, \$2,390

John & Ethel Goldberg Fund I

Grants from Donor Advised Funds

BAY COVE HUMAN SERVICES, INC., \$25,000

Baupost Group Charitable Fund

BOSTON URBAN YOUTH FOUNDATION, \$30,000

Cabot Family Charitable Trust Fund

GREATER BOSTON FOOD BANK, \$5,000

Walter and Alice Abrams Family Fund

HILL HOUSE, INC., \$10,000

Rogina L. & Stephen B. Jeffries Charitable Fund

UNITED WAY OF MASSACHUSETTS BAY AND MERRIMACK VALLEY, INC., \$15,000

Eisenson Family Fund



SELECTED GRANTS

HEALTH

A total of **\$9,493,336** in grants was made in the area of Health.
Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

AIDS ACTION COMMITTEE OF MASSACHUSETTS, INC., \$40,000

From the Permanent Fund for Boston

For the BE SAFE program, which seeks to build the capacity of existing out-of-school time programs to address the interconnected issues of sexual health, substance abuse and interpersonal violence

BOSTON MEDICAL CENTER CORPORATION, \$50,000

From the Permanent Fund for Boston

For the Violence Intervention Advocate Program, with the City of Boston, in response to rising rates of violence in the inner city

GREATER BOSTON INTERFAITH ORGANIZATION, \$40,000

From the Permanent Fund for Boston

For the Healthcare Reform Implementation Campaign, which seeks to ensure full and fair implementation of the Commonwealth's health care law



PERKINS SCHOOL FOR THE BLIND, \$40,000

\$35,500 from the Edith M. Ashley Fund and \$4,500 from the Maude A. MacNaught Fund

For the School's outreach program to benefit Boston children with visual impairments

Grants from Designated Funds

MASSACHUSETTS GENERAL HOSPITAL, \$76,283

Donaldson F. Jones Fund

MASSACHUSETTS HOSPITAL SCHOOL, \$2,184

Demetra Kenneth-Brown Fund

NORTHEAST HEALTH FOUNDATION, INC., \$4,936

Alice V. Kidder Fund

TUFTS-NEW ENGLAND MEDICAL CENTER, INC., \$71,068

Gerald V. Levreault & Claire H. Levreault Fund

VISITING NURSE ASSOCIATION OF MIDDLESEX-EAST, \$9,539

Reading Visiting Nurse Association Fund

Grants from Donor Advised Funds

BOSTON MEDICAL CENTER CORPORATION, \$10,000

Ronni Sachs Kotler Family Fund

CHILDREN'S HOSPITAL CORPORATION, \$10,000

Cynthia & Andrew Janower Charitable Fund

CURE ALZHEIMER'S FUND, \$10,000

Peter A. Brooke Fund

HEALTH CARE FOR ALL, INC., \$10,000

Villers Fund

SOUTH END COMMUNITY HEALTH CENTER, \$7,500

James M. and Cathleen D. Stone Foundation

EDUCATION

A total of **\$22,022,366** in grants was made in the area of Education.
Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

EFFICACY INSTITUTE INCORPORATED, \$60,000

\$45,000 from the Permanent Fund for Boston and \$15,000 from the Solomon Agoos Fund

For the Boston Campaign for Proficiency, an effort to create a “culture of achievement” by mobilizing adult leadership to promote proficiency for all Boston youth

FAMILY NURTURING CENTER OF MASSACHUSETTS, INC., \$125,000

From the Theodore C. Hollander Trust Fund

For its “Smart from the Start” program, which supports early learning for at-risk children by linking various services designed to promote health and education

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY, \$80,000

From the Charles Hapgood Fund

To support the Boston Public Schools Partnership Coordinator for a program that seeks to prepare at-risk students for the college experience

WRITEBOSTON, \$50,000

\$44,000 from the Permanent Fund for Boston and \$6,000 from the Sophia Snow Fund

For its “Write to Graduate” program, which seeks to raise retention and graduation rates in Boston alternative schools through the development of a new writing curriculum

Grants from Designated Funds

ACCESS, \$326,024

ACCESS Education Fund

AMERICAN ASSOCIATION OF COMMUNITY COLLEGES, \$70,700

Achieving the Dream Initiative Fund



BOSTON ADULT LITERACY FUND, \$481,924

English for New Bostonians Fund

JUNIOR ACHIEVEMENT OF NORTHERN NEW ENGLAND, \$2,302

Paul R. & Jacqueline D. Fehrenbach Family Fund

ST. COLETTA AND CARDINAL CUSHING SCHOOL OF MASSACHUSETTS INC., \$244,680

John S. McCann Fund

Grants from Donor Advised Funds

BOSTON ARTS ACADEMY, \$50,000

Gordon Educational Fund

FACING HISTORY AND OURSELVES NATIONAL FOUNDATION, INC., \$5,000

Kidder Smith Fund

GERMAINE LAWRENCE, INC., \$2,500

Quid Nunc Fund

SCHOOL OF THE MUSEUM OF FINE ARTS, \$12,500

Mill River Foundation Fund

SHADY HILL SCHOOL, \$23,500

Chertavian Family Fund

SELECTED GRANTS

CULTURAL INSTITUTIONS, ARTS AND HUMANITIES

A total of **\$10,724,367** in grants was made in the area of Cultural Institutions, Arts and Humanities.

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



PHOTO: DON WEST

ZUMIX, \$50,000

\$29,000 from the Anna Faith Jones Arts Fund, \$14,000 from the Permanent Fund for Boston, \$5,000 from the Katherine E. Dooley Fund and \$2,000 from the Irene Bancroft Fund
To support its "Foundation for Growth" organizational capacity building program

Grants from Designated Funds

ARTISTS FOUNDATION, INC., \$7,996

Artists Foundation Endowment Fund

BOSTON SYMPHONY ORCHESTRA, INC., \$28,677

Charlotte F. & Irving W. Rabb Family Fund

JOHN F. KENNEDY LIBRARY FOUNDATION, INC., \$97,056

John F. Kennedy Library Foundation Endowment Fund

MUSEUM OF FINE ARTS, \$3,539

Elizabeth Grant Fund

MUSEUM OF SCIENCE, \$58,649

Bradford Washburn Fund

Grants from Donor Advised Funds

ACTORS' SHAKESPEARE PROJECT, \$2,000

Atlantic Fund

CAMBRIDGE ART ASSOCIATION, \$10,000

Margaret M. Schmidt and Kenneth J. Danila Fund

HUNTINGTON THEATRE COMPANY, INC., \$3,000

Robert Strange Family Fund

INSTITUTE OF CONTEMPORARY ART, \$2,500

Plimpton – Shattuck Fund

WGBH EDUCATIONAL FOUNDATION, \$100,000

Reno Family Charitable Foundation

Grants from Discretionary Funds

ARTSBOSTON, \$50,000

From the Boston Foundation Arts Fund

To develop and launch a comprehensive performing arts calendar and information website

BOSTON CHILDREN'S MUSEUM, \$100,000

\$90,000 from the Anna Faith Jones Arts Fund, \$10,000 from the Edward Glines Fund

To develop a Learning and Teaching Museum at the Boston Children's Museum

OPERA BOSTON, \$40,000

\$26,500 from the Permanent Fund for Boston and \$13,500 from the Brookes White, Jr. Memorial Fund

For Opera Boston's Audience Stewardship Program

CONSERVATION/ENVIRONMENT

A total of **\$3,493,954** in grants was made in the area of Conservation/Environment.

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

Grants from Discretionary Funds

BOSTON NATURAL AREAS NETWORK, INC., \$50,000

\$37,000 from the Wildlife General Fund, \$5,450 from the Herbert Farnsworth Fund, \$4550 from the Hollis D. Leverett Fund and \$3,000 from the Permanent Fund for Boston
To support the expansion of its education, training and community engagement programs for youth and adults

CHARLES RIVER CONSERVANCY, \$50,000

From the Permanent Fund for Boston
For support of its "Swimmable Charles Initiative," which seeks to return swimming to the Charles River

NEIGHBORHOOD OF AFFORDABLE HOUSING, INC., \$50,000

From the Permanent Fund for Boston
For support of its Chelsea Creek Restoration Partnership, which seeks to transform the Creek into an environmental, educational, economic and recreational resource for East Boston, Chelsea and Revere

NEW ENGLAND AQUARIUM, \$90,000

From the Permanent Fund for Boston
To support the implementation of a communications plan, including the redesign of the Aquarium's website

Grants from Designated Funds

CAPEN HILL NATURE SANCTUARY, \$14,177

Gaywest Farm Fund

CHARLES RIVER CONSERVANCY, \$663

Charles River Parklands Stewardship Fund

ESSEX COUNTY GREENBELT ASSOCIATION, INC., \$16,866

Allyn Cox Fund for Essex County Greenbelt

NATURAL RESOURCES TRUST OF EASTON, INC., \$45,970

Sheep Pasture Fund

NEW ENGLAND FORESTRY FOUNDATION, INC., \$9,219

New England Forestry Foundation Fund

Grants from Donor Advised Funds

EARTHWATCH INSTITUTE, \$10,000

Butler's Hole Fund

ENVIRONMENTAL DEFENSE, INC., \$10,000

Lucius T. Hill III and Wendy Y. Hill Fund

LEAGUE OF CONSERVATION VOTERS EDUCATION FUND, \$5,000

Barbara Lee Family Foundation Fund

MASSACHUSETTS AUDUBON SOCIETY, INC., \$30,000

GC & JW Lodge Fund

ROSE FITZGERALD KENNEDY GREENWAY CONSERVANCY, INC., \$1,500

Larry DiCara Fund



SELECTED GRANTS

HOUSING AND COMMUNITY DEVELOPMENT

A total of **\$4,140,332** in grants was made in the area of Housing and Community Development.

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

Grants from Discretionary Funds

**BOSTON AFFORDABLE HOUSING COALITION,
\$40,000**

From the Permanent Fund for Boston

For the Coalition's campaign to preserve HUD-assisted multi-family housing in Boston

**LOCAL INITIATIVES SUPPORT CORPORATION,
\$200,000**

\$159,000 from the J.E. Adrian Blais Fund I and \$41,000 from the Permanent Fund for Boston

To expand the supply of affordable housing in the Greater Boston area through financing, community development activities and capacity building initiatives

**MASSACHUSETTS SENIOR ACTION COUNCIL,
\$75,000**

\$50,000 from the Frederika Home Fund and \$25,000 from the Edith M. Ashley Fund

For the Greater Boston Senior Housing Preservation Project, an organizing and advocacy program that supports affordable housing for low- and moderate-income seniors

**METROPOLITAN BOSTON HOUSING PARTNERSHIP,
\$60,000**

From the Permanent Fund for Boston

For the "Foreclosure Prevention and Tenancy Preservation" project, which seeks to prevent foreclosures and eliminate or reduce the impact of foreclosures on affected tenants

Grants from Designated Funds

**CASTLE SQUARE TENANTS ORGANIZATION, INC.,
\$10,000**

Summer Safety/StreetSafe Boston

COMMUNITY RESOURCES FOR JUSTICE, \$31,273

Gertrude Hooper Fund

CRITTENTON WOMEN'S UNION, \$3,539

Elizabeth Grant Fund

**DUDLEY STREET NEIGHBORHOOD INITIATIVE,
INC., \$15,000**

Civic Engagement Project Fund

ROXBURY MULTI-SERVICE CENTER, INC., \$11,314

Harold Peabody Memorial Fund

Grants from Donor Advised Funds

CENTER FOR TEEN EMPOWERMENT, INC., \$20,000

Lesser Eber Fund

COOPERATIVE ECONOMICS FOR WOMEN, \$1,000

Circle Fund

GRASSROOTS INTERNATIONAL, INC., \$3,000

Rodgers Community Fund

PROJECT HOPE, \$1,000

Chasin/Gilden Fund

UNITED FOR A FAIR ECONOMY, INC., \$2,000

Abromowitz/Ruttenberg Family Fund



CIVIC AFFAIRS

A total of **\$2,590,768** in grants was made in the area of Civic Affairs.
Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

CENTRO PRESENTE, INC., \$50,000

From the Permanent Fund for Boston

To continue its immigrant rights work with Central Americans through the “Keep Our Families Together Campaign”

MASSACHUSETTS VOTER EDUCATION NETWORK, \$50,000

\$45,200 from the Permanent Fund for Boston and \$4,800 from the Katherine C. Wheeler Fund

For its “Democracy for Nonprofits” project, which seeks to work with community-based nonprofits to engage clients and members in the voting process

PUBLIC POLICY INSTITUTE, \$50,000

\$31,000 from the Permanent Fund for Boston and \$19,000 from the Grace A. Jacobs Fund

For the ONE Massachusetts Campaign, a network dedicated to rebuilding public awareness and support of the public functions of government through community outreach, skill-building and leadership development

THE PARTNERSHIP, \$65,000

From the Permanent Fund for Boston

For a program that seeks to increase diversity on nonprofit boards in Boston

Grants from Designated Funds

ANDOVER VILLAGE IMPROVEMENT SOCIETY, \$5,000

Bessie P. Goldsmith Fund

BOSTON CENTER FOR COMMUNITY AND JUSTICE INC., \$1,700

Ernesto “Tito” Whittington Scholarship Fund



BOSTON NEIGHBORHOOD NETWORK TELEVISION, \$12,000

Summer Safety/StreetSafe Boston Fund

SOCIAL LAW LIBRARY, \$86,817

Social Law Library Endowment Fund

Grants from Donor Advised Funds

AMERICAN CIVIL LIBERTIES UNION FOUNDATION OF MASSACHUSETTS, \$1,000

Mystic Harmony Fund

AMNESTY INTERNATIONAL OF USA, INC., \$5,000

Ellin Smalley Fund

CITY YEAR, INC., \$25,000

Bill and Barbara Burgess Fund

MASSINC, \$1,000

Remmer-Fox Family Fund

RESIST, INC., \$5,000

Robert and Linda Glassman Fund

SPECIAL INITIATIVES

The Boston Foundation often plays a leadership role in developing focused initiatives in key areas of civic life where intensive involvement has the potential for significant impact.

On these pages are brief descriptions of current initiatives and grants made.

Pilot School Initiative

This initiative is designed to support Boston public schools interested in exploring the Pilot School model or expanding existing Pilot Schools. Like Charter Schools, Pilot Schools have flexibility in hiring, scheduling, work rules and budgeting. In 2008, the Foundation made planning grants ranging from \$18,000 to \$20,000 to the following schools:

Boston Arts Academy
William E. Channing Elementary School
Charlestown High School
Community Academy of Science and Health
Educational Choices for Career Opportunities, Inc.
Edward Everett Elementary School
Fenway High School
Gavin Middle School
Haley Elementary School
Lucy Stone Elementary School
Mary Lyon School
Media Communications Tech High School
Office of High School Renewal
(for a school based on Fenway High)
Parkway Academy of Technology and Health
Paul A. Dever Elementary School
Social Justice Academy
TechBoston Academy
Urban Science Academy
William J. Ostiguy Recovery High School and
University High School

SkillWorks

SkillWorks is the largest public/private investment in workforce development in Boston's history. Through this investment, SkillWorks seeks to change the way employers hire and promote entry-level workers from Boston's neighborhoods by promoting employer-driven partnerships with community training organizations. Funding partners include the City of Boston, the Commonwealth of Massachusetts and other local and national funders. In June, the next five-year phase of SkillWorks was announced. These grants were made in 2008:

ACTION FOR BOSTON COMMUNITY DEVELOPMENT, \$330,000

For the Community Health Worker Initiative of Boston

ASIAN AMERICAN CIVIC ASSOCIATION, \$250,000

For the Partnership for Automotive Career Education

CRITTENTON WOMEN'S UNION, \$300,000

For the Workforce Solutions Group

INTERNATIONAL INSTITUTE OF BOSTON, \$213,889

For the Hotel Career Center

JEWISH VOCATIONAL SERVICE, \$165,000

For the Healthcare Training Institute

VOICE AND FUTURE FUND, INC., \$227,400

For the Building Services Career Path Project



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Out of the Blue Grants

This special program makes unsolicited, unrestricted grants of \$75,000 to nonprofit organizations that have strong leadership and engage in outstanding work. The goal is to advance priority work in sectors of major interest to the Boston Foundation and to provide timely support to highly effective organizations. All of these grants were from the Permanent Fund for Boston and were made in 2008. This year's recipients were:

ACCESS

ACCESS works to ensure that all young people in Boston have the financial information and resources necessary to achieve their dream of a higher education. Since its founding in 1985, ACCESS has provided financial aid advising and scholarships to thousands of Boston students, helping them realize their higher education goals and giving them a better foundation for a successful and productive future.

SELECTED GRANTS

BOYS AND GIRLS CLUBS OF DORCHESTER

Formerly known as the Colonel Daniel Marr Boys and Girls Club, the organization has transformed itself from a small program at just one site to a major institution that now operates three clubhouses. The Clubs serve more than 4,000 youth in the Field's Corner and Upham's Corner neighborhoods, offering a safe place for them to learn and grow during those important out-of-school time hours.

CITIZENS HOUSING AND PLANNING ASSOCIATION

Citizens' Housing and Planning Association (CHAPA) is the nonprofit umbrella organization for affordable housing and community development activities throughout Massachusetts. Established in 1967, CHAPA is the only statewide group that represents all interests in the housing field, including nonprofit and for-profit developers, homeowners, tenants, bankers, real estate brokers, property managers, government officials, and others.

THIRD SECTOR NEW ENGLAND

Third Sector New England provides information and services to build the knowledge, power and effectiveness of nonprofit organizations that engage people in community and public life. It also acts to promote wider recognition of community-based organizations as the primary stewards of core societal values. The ultimate intention of this organization's work is to create a more just and democratic society.

APPLYING FOR A GRANT

From the **Settlement Houses of the 1920s**
to the **community-based**
organizations of the 1960s

From the **first network of neighborhood**
health centers in America to the
first national model for youth service

From **WGBH-TV** to the
Greater Boston Food Bank

For more than 90 years, the Boston Foundation has been supporting Greater Boston's nonprofit organizations, encouraging fresh ideas and innovation—providing seed capital for dreams.

The Boston Foundation invests in nonprofit organizations that are essential partners in the task of creating a livable metropolitan area that is a center of innovation and opportunity for all of its residents.

With a special focus on supporting those areas that are central to Greater Boston's competitiveness in the global economy, the Foundation is continuing a tradition of grantmaking that has helped to make our community what it is today.

The Board of Directors of the Boston Foundation has designated three areas of community life as strategic priorities for the Foundation's grantmaking and civic leadership. They are Education (including Out-of-School Time); Housing and Community Development (including Community Safety); and Workforce Development.

In addition, the Foundation makes grants in the following areas: Arts and Culture; Civic Engagement; Economic Development; Health and Human Services; the Nonprofit Sector; and the Urban Environment.

For Greater Boston area nonprofit organizations, our primary grantmaking program is organized around Twice-Yearly Grants and Initiatives and Other Funding Opportunities.

We invite you to visit our website for detailed information about how to apply for a grant from the Boston Foundation. Please go to www.tbf.org and choose Grant Seekers.



Program Staff (seated, from left): Rebekah Cloutier, Robert Lewis Jr., Andrew McDowell. (Standing, from left): Allison Bauer, Loh-Sze Leung, Claire Dunning, Elizabeth Pauley, Marta Rivera, Krista Chappell, Andrea Martinez, Corey Davis, Jill Lacey Griffin, Marc Germain, Ann McQueen, Jeff Paquette, Richard Ward, Liz Miranda (former Diversity Fellow), and Natanja Benskin.

HOW TO BECOME A DONOR

It All Begins with You

Wherever you are in the lifecycle and focus of your giving, the Boston Foundation can make your contributions work harder and have a greater impact. We will marry your aspirations and passions to our deep understanding of the issues and the communities we serve to achieve results that matter.

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

Why Choose the Boston Foundation?

- * We have the expertise to help you design an approach to philanthropy that's right for you
- * Your passions and interests will direct your giving
- * Our experience can help increase the impact of your giving
- * We have the ability to handle complex transactions and accept non-traditional gifts
- * We make it easy and quick to open and maintain a fund
- * You will have an entire department that is dedicated to meeting your needs and answering all of your questions
- * You will join an extended family of other donors and civic leaders

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

Donor Advised Funds

A Strategic and Personalized Approach to Giving

You can open a Donor Advised Fund, which operates much like a private foundation, but without the administrative burdens. Through your fund, you can make contributions to nonprofit organizations here or anywhere in the United States—even internationally. And if you want assistance with your giving, you have access to knowledgeable and experienced people who can help you create a giving plan that meets your needs.

Planned and Legacy Giving

Have a Lasting Impact on the Areas You Care About

Planned and legacy giving through the Boston Foundation offers a way to support the causes and communities you care about—and create a lasting legacy for the future. We will help you to use your assets in creative ways so that you can give something back to the community while providing all of the necessary financial security you and your family need.

The Permanent Fund for Boston

Sustain the People and Places You Care About

You can make a gift to Greater Boston's primary endowment, the Permanent Fund for Boston, with confidence that it will always be used to meet the most urgent needs facing our community. Grants from this fund are awarded through a process that is led by professional grantmakers who have a deep understanding of our community.



Development and Philanthropic and Donor Services Staff (from left): Dana Turpie, Caitlin Rogers, Ruben Orduña, Kate Guedj, Amy Park Appleby, Diane Elenbaas, and Megan O'Toole.

Field of Interest and Designated Funds
Benefit the Issues and Groups That Are Important to You

You can direct your giving to the area of community life that has meant the most to you—or even a specific nonprofit organization that has made a difference in your life—by establishing a fund to benefit issues or institutions that are important to you.

The Civic Leadership Fund
Help Us Make Lasting Change

You can contribute to our ‘beyond grantmaking’ work—including the commissioning and publishing of fresh research on issues that are challenging Greater Boston, bringing people together to exchange information and ideas, encouraging cross-sector partnerships, and creating action plans for change in areas like housing, education and workforce development.

continued on next page

Philanthropic and Donor Services

We Are Here to Help You

We will work with you to open a fund and be there for you when you are a donor. An entire department exists to make your philanthropy as fulfilling and rewarding as possible. We can identify organizations that you can support with confidence. We keep you updated on the latest giving options and opportunities and offer the opportunity to become involved on many levels with the work of the Foundation.

The Many Ways You Can Give

- * Cash contributions
- * Gifts of Appreciated Assets, including: stocks and bonds, mutual funds, readily marketable real estate
- * Assets from a Private Foundation
- * Planned and Legacy Giving, including gifts by will or trust, retirement plan assets and life insurance, gifts that pay an income and gifts that preserve assets for heirs



Finance and Administration Staff (from left): George Wilson, Allison Bates, Michaela June, Hope Groves, Anita Connors, Jessie Zuberek, Stacey Riddick, Glen Davis, Beth Llewellyn, Robert Banks, and Anna Gallo.

BOSTON FOUNDATION FUNDS

Hundreds of individuals, families and companies have immeasurably strengthened the Greater Boston community by establishing and contributing to funds at the Boston Foundation. The Foundation works closely with our 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

Individuals, Charitable Funds, Corporations and Foundations

Anonymous Donor
Association of the Pupils of J. Thomas Black, C.S.B.
Mekayla Beaver
Chester County Community Foundation, Inc.

Mr. Brian Hyde and Mr. Joe Fiorello
Institute for Affirmative Action
Maragaret Mack and John Powell
David and Mary Ellen Moir
NAIOP
Network for Good
Francis Ward Paine Foundation, Inc.
Ms. Pamela M. Smith

Strategy One, Inc.
Wilbert G. and Eunice Muttart Foundation
Ms. Hungwah Yu and Mr. David J. Elliott

Estates & Trusts

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

45 New Funds Were Established in 2008

The Boston Foundation gratefully acknowledges the generous and community-minded people who established funds at the Boston Foundation during 2008. The following list includes new Discretionary Funds, Designated Funds and Donor Advised Funds.

Discretionary Funds

Diane Heath Beever Memorial Fund
Brother Thomas Fund
Grace L. Holland Fund
Robert Wadsworth Fund for the Future of Boston

Designated Funds

Lucy Kasparian Aharonian Memorial Scholarship Fund
Herbert Brandshaft Scholarship Fund

Advised Funds

Brother Thomas Advised Fund
Adobe Foundation Fund
Aequalis Fund
Amigos de Oaxaca Fund
Balzer/Bellinger Fund
Barnes Family Charitable Fund
Beachcomber Fund

Brooke Family Donor Advised Fund
Callan Memorial Fund
Kate Crozier Fund
Sarah Derby and Gary MacDonald
Marshall and Laura Derby Charitable Fund
Rebecca Derby and Evan Morton
EqualLogic Foundation Fund
Marsha Feinberg Fund
Robert L. Feinberg Fund
Ferrante Charitable Fund
Galilean Fund
Garuda Fund
Gilbert Fund
Jade Fund
JP House Sale Fund
Lewis Family Fund
Henry R. Lewis Family Fund
Loomis Sayles Charitable Fund
Mason-Brown Fund

Match School Scholarship Fund
Pappas Fund
Robert Myles Pearson Memorial Fund
RMB Fund
Rosen Family Fund
Daniel and Brooke Roth Charitable Gift Fund
David Salten Fund
Gary P. and Kimberly H. Savage Charitable Fund
K.A. and P.R. Sherbrooke Family Fund
Thorvale Fund
Mimi Chandler Watt Fund
William B. and Janet McCormick White Fund
Fund for World Class Schools

Planned and Legacy Gifts Received

Many Boston Foundation donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad and diverse group of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, and gifts of retirement plan assets and life insurance. The following planned and legacy gifts were received in 2008 and are gratefully acknowledged.

The Franklin S. & Cynthia B. Browning Fund

After conducting their philanthropy through a Donor Advised Fund at the Boston Foundation for 20 years, Franklin and Cynthia Browning left a sizeable bequest to establish a named fund within the Permanent Fund for Boston this year. Both had been deeply committed to the Greater Boston nonprofit community and served on a number of boards. The Permanent Fund is an unrestricted fund that provides the Foundation with the flexibility to respond to the most pressing contemporary needs of the community.



Estate of Samuel Bayness Andrews
Diane Beever Charitable Remainder Unitrust
The Cynthia B. Browning 1992 Trust
Franklin S. Browning, Jr. 1992 Trust
Margaret A. Bush Charitable Gift Annuity
Jessie B. Cox Charitable Lead Trust
Estate of Mary C. Farr
Americo J. Francisco Charitable Trust
Francisco Realty Trust
Estate of Albert F. Gilmartin
Estate of Harry Holland
Jonathan M. Keyes Charitable Remainder Unitrust
Michael R. Kidder Charitable Lead Annuity Trust
Mason Charitable Remainder Annuity Trust
Harold Whitworth Pierce Charitable Trust
Peter S. Lynch Charitable Remainder Unitrust
Arthur L. Sherin Trust
Binkley C. Shorts Charitable Gift Annuity
Binkley C. and Paula F. Shorts Charitable Lead Annuity Trust
Estate of Stetson Whitcher
E.C. Winship '87 Trust

Rogerson Legacy Society

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

Mary Lee T. and Peter C. Aldrich

Howard and Carol Anderson

Diane DeSerras Arenella

David B. Arnold and Dorothy Q. Arnold

Mrs. John Atkinson

Geoffrey D. Austrian

Theodore S. Bacon, Jr.

Sherwood E. Bain

Mary Barber

Doreen Biebusch

Thomas W. Bird

Beryl H. Black

David Blot

Janine Bouchard

Kenneth S. Brock

Seth N. Brockway

Jacob F. and Barbara C. Brown

Beryl H. Bunker

George E. Burden

The Hon. Nonnie S. Burnes and
Richard M. Burnes, Jr.

Margaret A. Bush

Frank and Ruth Butler

Robert B. Canterbury

Helen T. W. Chen and Keith R. Ohmart

Penny and Ed Cherubino

Arthur D. Clarke

Margaret J. Clowes

Frances F. Connelly

Constance Counts

Elizabeth D. Coxe

Diane Currie

Elizabeth T. Damon

Marilyn Darling

David S. and Mrs. Shirley G. Dayton

Lucy S. Dillon

R.J. Donofrio

Joy G. Dryfoos

Malcolm Dunkley

Catherine Axon & Thomas M. Elder

Anita Maria Elliott

Marian M. Ferguson

June M. Ficker
 Edward S. Fleming
 Walter Eugene Geier
 Robert J. Glaser, M.D.
Harriet E. Glover
 Sandra and Philip Gordon
Kate and Thierry Guedj
 Thomas Hale
 Charlotte I. Hall
 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 and Joe Fiorello
Jane Wegscheider Hyman
 Donald G. Irving
 Stephen G. and Rosemarie Torres Johnson
Helen M. Jones
 Karen Joyce and John Fitzgerald
 Ms. Ruth G. Kahn
 Mr. Andrew M. Kamarck
 Gary P. Kearney, M.D. and Susan Kearney
Jonathan M. and Judith B. Keyes
Vera Kilstein
 Barbara N. Kravitz
Peter and Stephanie Kurzina
 Frances J. Lee-Vandell
Carol F. Levin
 John H. Livens
 Dunbar Lockwood, Jr.
 Donald J. & Susan Kelley MacDonald
 Mary Madden
Myron and Barbara Markell
 Robert and Poppy Mastrovita
 Alice McGrath
 Edward J. and Jane S. Michon
 Joseph M. Miller, M.D.
 Robert Minnocci
Timothy and Deborah Moore
 Charles Fessenden Morse
 Donald M. Morse
 Frederick W. Neinas, M.D.
 Mary Greene Nelson



Paula and Binkley Shorts
Rogerson Legacy Society
Members

Paula and Binkley Shorts, proud members of the Rogerson Legacy Society, set up a Donor Advised Fund at the Boston Foundation in the mid 1990s. "We felt that we had been very lucky in life," says Mr. Shorts, "and we wanted to step up our philanthropy and give something back." They are also strong proponents of planned giving and established the Boston Foundation's very first charitable gift annuity. Since that time, they have made other planned gifts, including two charitable lead trusts and a gift of life insurance policies. They also have earmarked gifts to the Permanent Fund for Boston, which serves as a virtual endowment fund for Greater Boston.

Mark A. and Judith A. Osborne
Jennifer Jossie Owens
 Douglas D. and Geraldine R. Payne
Nancy E. Peace
 Drs. Robert A. and Veronica S. Petersen
 Agatha W. Poor
Nathaniel Pulsifer
 Glendora M. Putnam
 Irving W. Rabb and Charlotte F. Rabb*
 Warren Radtke and Judith Lockhart Radtke
 Chris Remmes

Richard L. Robbins
 Sumner and Helen Rodman
 Eleanor L. Ross
 Jordan S. Ruboy, M.D.
 John A. Russell
 Beverly H. Ryburn
 Anthony Mitchell Sammarco
 Margaret M. Schmidt
 Ruth Gessner Schocken
 Charles R. Schroeder
 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
 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
Robert R. Wadsworth and
Catherine E. Moritz
 J. H. Walton, Jr. and Carolyn Walton
 Gordon Weil, Jr.
 Inge J. Wetzstein
 Elizabeth A. Wheeler
 Constance V. R. White
 Michael N. and Mary M. Wood
 Eleanor D. Young
 Anonymous Society Members = 72

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

Donors to the Civic Leadership Fund

This important fund helps to fuel the Boston Foundation's increasingly effective civic leadership activities, including commissioning fresh research on important areas of community life, publishing leading edge reports based on the research, convening groups of people from all walks of life to discuss new information and ideas, and forming task forces to create action agendas for positive change in our city and our region.

A. W. Perry, Inc.
Abt Associates
Alchemy Foundation
Aliad Fund at the Boston Foundation
Allyn Foundation, Inc.
Bruce J. Anderson Foundation Fund at the Boston Foundation
Carol and Howard Anderson Family Fund at the Boston Foundation
Anonymous donors (7)
Mrs. Mara and Mr. Keith Aspinall
Bank of America Charitable Foundation
Beacon Capital Partners
Mr. Robert L. Beal
Bechler Canyon Fund at the Boston Foundation
Dr. James and Mrs. Susan Beck
Mr. Joshua and Mrs. Anita Bekenstein
Mr. James S. Betoni
Bilezikian Family Foundation
Mr. Mark F. Blaxhill
Blue Cross Blue Shield of Massachusetts
Joan T. Bok Fund at the Boston Foundation
The Boston Company Asset Management, LLC
Mr. Brian J. and Mrs. Karen Conway
Boston Culinary Group, Inc.
Boston Digital Bridge Foundation, Inc.
Boston Globe
Boston Herald
Boston Private Bank & Trust Company
Mr. and Mrs. F. Gorham Brigham, Jr.
Peter A. Brooke Fund at the Boston Foundation
Lord-Buck Fund at the Boston Foundation
Bill and Barbara Burgess Fund at the Boston Foundation
William T. Burgin Fund at the Boston Foundation
Butler's Hole Fund at the Boston Foundation
Dr. Louis and Mrs. Julie Casagrande
Catherine and Paul Buttenwieser Foundation
Charles River Charitable Foundation
Chertavian Family Fund at the Boston Foundation
Citizens Bank Foundation
Mr. Ferdinand Colloredo-Mansfeld
Mr. John M. Connors, Jr.
Cooper Leaser Family Fund at the Boston Foundation
Constance and Lewis Counts Fund at the Boston Foundation
Corcoran Jennison Companies
Mr. Stephen Crosby and Ms. Helen Strieder
Ms. Catherine D'Amato
Dammann Boston Fund at the Boston Foundation
Mr. Andre and Mrs. Marilyn Danesh
Mr. Richard S. Davis
Davis Marcus Partners
Denterlein Worldwide
Mr. Gerry DeRoche
Deshpande Foundation at the Boston Foundation
DeWolfe Family Fund at the Boston Foundation
Dibble Family Fund at the Boston Foundation
Lawrence S. DiCara, Esq.
Joe DiGeronimo Charitable Fund at the Boston Foundation
Mr. James and Mrs. Janice DiStasio
Mr. Ralph J. Donofrio
Drew Company, Inc.
Druker Company, Ltd.
Eastern Bank Charitable Foundation
Eaton Vance Management
Mr. William S. Edgerly
Eisenson Family Fund at the Boston Foundation
David W. Ellis Revocable Trust
Ronald E. Feldman Trust
Mr. Tim and Mrs. Corinne Ferguson
Paul and Phyllis Fireman Charitable Foundation
Fish Family Foundation
Mr. Laurence B. Flood and Ms. Mary Tyler Knowles
Mr. Jeffrey L. Foust
Drs. Robert H. and Rochelle R. Friedman
Ms. Susan Y. Friedman
Fulkerson Family Fund at the Boston Foundation
Gabrieli Family Foundation
Mr. Richard C. and Mrs. Louisa Garrison
Genzyme Corporation
Mr. Robert E. Giannino-Racine
Mr. Chad and Anne Gifford
Carol R. & Avram J. Goldberg Fund at the Boston Foundation
Mrs. Sandra and Mr. Philip Gordon
Mr. Roger C. Greene
Mr. Paul S. Grogan and Ms. Karen Sunnarborg
H.N. Gorin, Inc.
Mr. Jeffrey J. and Mrs. Hope C. Groves
Mr. Paul and Mrs. Joanne Guzzi
Rev. Ray Hammond and Dr. Gloria Hammond
Harvard Pilgrim Health Care
Petie Hilsinger Fund at the Boston Foundation
Margaret Hixon Fund at the Boston Foundation
Mr. Thomas and Mrs. Diane Hollister
Mr. Brian Hyde and Mr. Joe Fiorello
Income Research & Management
Mr. Ira A. Jackson
Jacobson Family Foundation Trust
Ms. Joanne Jaxtimer
Ms. Jackie L. Jenkins-Scott
John Hancock Life Insurance Company
Mr. Stephen and Mrs. Cheryl Jonas
Jeffrey F. Jones, Esq.
Mr. Tripp and Mrs. Robin Jones
Mr. David Kalan
Albert J. & Diane E. Kaneb Family Fund II at the Boston Foundation
Martin S. Kaplan, Esq.
Karp Family Foundation
Mr. Brian H. Kavooagian
Michael B. Keating, Esq.
Mr. Francis Keegan
Mr. Dennis J. Kelly
KPMG, LLP
The Robert & Myra Kraft Family Foundation, Inc.
Kravitz Family Fund at the Boston Foundation
Mr. Paul A. and Mrs. Mary E. La Camera
G. Barrie Landry Fund at the Boston Foundation

Barbara Lee Family Foundation Fund at the Boston Foundation

Mr. Edward P. and

Mrs. Patricia K. Leibensperger

Liberty Mutual Foundation, Inc.

Ms. Beth Llewellyn

Loomis Sayles & Company, Inc.

Louise Crane Foundation

Lovett-Woodsum Family Fund at the Boston Foundation

LMG Fund at the Boston Foundation

Peter S. Lynch Charitable Unitrust

Mr. Martin and Mrs. Tristin Mannion

Mr. Bernard A. Margolis

Ralph C. Martin, II, Esq.

Martin Fund at the Boston Foundation

Mr. Claudio Martinez

Sydell and Edward I. Masterman Fund at the Boston Foundation

Ms. Priscilla A. Mauro in honor of Kenneth Durant and Anthony Maiella, M.D.

Mr. Kevin McCall

Mr. Robert F. Meenan

Emily & Bernard Mehlman Fund at the Boston Foundation

Ms. Mary Jo Meisner

Mellowes Fund at the Boston Foundation

Mr. Robert T. P. Metcalf

Meyer Foundation Fund at the Boston Foundation

Mill River Foundation Fund at the Boston Foundation

Mr. Scot A. Miller

Mr. David and Mrs. Mary Ellen Moir

Mr. Herbert E. Morse

Mr. Brian Moynihan & Ms. Susan Berry

Muddy Pond Trust Fund at the Boston Foundation

Mr. David G. Mugar

Tami E. Nason & Kent A. Lage Fund at the Boston Foundation

National Association of Industrial and Office Properties

National Development

National Grid USA

New Boston Fund, Inc.

New England Cable News

Northern Trust Bank

Mr. and Mrs. Kenneth J. Novack

Novotny/Swahnberg Fund at the Boston Foundation

Mr. Mark E. Nunnally and Ms. Denise M. Dupre

Obermayer Foundation, Inc.

Mr. Thomas L.P. O'Donnell

Mr. Ronald P. O'Hanley

O'Neill & Associates

Barrie Landry, Donor to the Civic Leadership Fund

Barrie Landry, who has a Donor Advised Fund at the Boston Foundation, contributed to the Boston Foundation's Civic Leadership Fund this year through her fund. Passionate about education and social justice, she appreciates the grantmaking the Foundation does in those areas, but also supports its 'beyond grantmaking' work, such as publishing cutting edge research on public education, and releasing the research at Understanding Boston forums. The forums bring together public officials, school leaders, teachers, parents and others to examine the most important issues affecting our community's young people and families.



Mr. Ruben D. Orduna and Ms. Elizabeth G. Hill

Mr. James J. and Mrs. Kimberly S. Pallotta

Mr. Anthony Pangaro

Parker Family Fund at the Boston Foundation

Harold & Nancy Parritz Family Foundation

Partners Healthcare

Mr. Thomas and Mrs. Ellen Payzant

Mr. Lovett C. Peters

Mr. Kevin C. and Mrs. Anne Phelan

Mr. Michael E. Porter

PricewaterhouseCoopers

Prime, Buchholz and Associates, Inc.

Procter & Gamble

Pzena Investment Management, LLC

Mr. Irving W. Rabb

Mr. Yale and Mrs. Barbara Rabin

Relational Investors, LLC

Remmer-Fox Family Fund at the Boston Foundation

Mr. Gary and Mrs. Natalie Robinson

Rodgers Community Fund at the Boston Foundation

Mr. Sumner Rodman

Mr. William G. Rogerson

Rutabaga Capital Management

Ms. Helen Chin Schlichte

The Schoen Family Foundation

Charles S. and Zena A. Scimeca Charitable Fund at the Boston Foundation

Mr. David W. Scudder

Sherman Family Foundation Fund at the Boston Foundation

John and Susan Simon Boston Foundation Fund

Richard & Susan Smith Family Foundation

Mr. Gary L. Smith

Solomon McCown & Company, Inc.

Alan D. and Susan Lewis Solomont Family Foundation

Sovereign Bank

Mrs. Helen Spaulding

Mr. and Mrs. William and Christine Speciale

Stephanie H & David A Spina Family Foundation

Ms. Micho F. Spring

David F. Squire Family Fund at the Boston Foundation

State Street Global Advisors

Mr. James and Mrs. Cathleen Stone

Matthew J. & Gilda F. Strazzula Foundation

TA Associates Realty

Thomsen Family Fund at the Boston Foundation

Mr. Gregory Torres and Ms. Elizabeth Pattullo

Ms. Elaine Ullian

Mr. Peter S. and Mrs. Pamela L. Voss Wainwright Bank

Mr. William J. and Mrs. Linda M. Walczak

Mr. Robert W. Weinstein

Mr. Fletcher H. and Mrs. Benaree P. Wiley

Mr. George and Mrs. Judy Wilson

Natica R. Williams Fund at the Boston Foundation

Winn Development Company

Ms. Hungwah Yu and Mr. David J. Elliott

Donors to the Boston Foundation Arts Fund

In 1997, the Boston Foundation launched an ambitious campaign to build a \$20 million permanent fund to support the arts in Greater Boston. With an initial commitment of \$1.2 million from The Wallace Foundation, the Foundation's Board of Directors agreed to match every contribution made. This year, thanks to a generous gift from the estate of Brother Thomas Bezanson, the Foundation not only reached—but surpassed—its goal. The following people and organizations contributed \$5,000 or more to this historic campaign. Hundreds of other people made smaller contributions. *All* of the gifts are gratefully acknowledged by the Foundation and Greater Boston's cultural community.

\$10,000,000 AND ABOVE

The Permanent Fund for Boston

\$1,000,000 - \$9,999,999

Anonymous

Lila Wallace - Reader's Digest Fund

Brother Thomas Fund

Brother Thomas Charitable Foundation

\$500,000 - \$999,999

Edward Hyde Cox Fund

Edward Hyde Cox Trust 1985

Stephen and Sybil Stone Arts Fund

Stephen and Sybil Stone Foundation

\$250,000 - \$499,999

Mrs. Catherine and Dr. Paul A. Bittenwieser

Linda Cabot Black

Anna Faith Jones Arts Fund

Anonymous

Brooks White, Jr. Memorial Fund

Dr. Brooks S. White

\$100,000 - \$249,999

Hunt Alternatives Fund

Anna Faith Jones Arts Fund

Swanee Hunt Family Foundation

Edith Allanbrook Fund

Estate of Edith Allanbrook

Mary C. Farr Arts Fund

Mary C. Farr 1986 Trust

Estate of Mary Farr

*MassDevelopment Arts Fund for Community
and Economic Development*

MassDevelopment

\$50,000 - \$99,999

Estate of Grace Scott Hollett

The Philanthropic Collaborative, Inc.

David W. Scudder

Helen Spaulding

Clara Wainwright

Edwin S. Webster Foundation

Anna Faith Jones Arts Fund

Cabot Family Charitable Trust

Mr. and Mrs. Caleb Loring, Jr.

The Philanthropic Collaborative, Inc.

Clara Wainwright

\$25,000 - \$49,999

Anonymous (2)

Robert L. Beal

Franklin S. and Cynthia B. Browning

Citizens Financial Group, Inc.

Sandra and Philip Gordon

Kravitz Family Fund

Robert O. Preyer Charitable Lead Unitrust

Robert A. Radloff and Ann M. Beha

Anna Faith Jones Arts Fund

Gilbert H. Hood Family Fund

Kravitz Family Fund

William J. and Lia G. Poorvu Foundation

The Robert O. Preyer Charitable Lead Unitrust

\$10,000 - \$24,999

Anonymous

Fish Family Foundation

Rachael P. and Andrew P. Goldfarb

Mildred S. and Herbert Lee

Mrs. Robert B. Newman

Tiny Tiger Foundation

Anna Faith Jones Arts Fund

Stephen Coit and Lois C. Russell

Mr. and Mrs. John F. Keane

Mellon Bank

Rust Bowl Fund

Albert and Elizabeth Stone

Thomsen Family Fund

\$5,000 - \$9,999

Peter Brooke Fund

Combined Jewish Philanthropies of Greater Boston

Brad Gatlin Family Fund

Kenwood Foundation

Gladys J. Ogren Charitable Lead Unitrust II

United Asset Management Charitable Foundation

Anna Faith Jones Arts Fund

George and Nedda Anders Fund

Bruce J. Anderson Foundation

Anonymous (2)

Butler's Hole Fund

P. Leo Corcoran

Catherine S. England Fund

John L. Gardner

Martin S. Kaplan, Esq.

James and Maureen Mellowes

H. Roderick and Joan P. Nordell

Hanson S. Reynolds, Esq.

Helen Spaulding

Discretionary Funds

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

THE PERMANENT FUND FOR BOSTON

Many donors have established funds that are totally unrestricted or have broad purposes, giving the Boston Foundation flexibility in the way the income is used. These are the primary funds for which Greater Boston area nonprofit organizations may apply. They provide support to programs that address a broad range of community needs. The following is a list of all Discretionary Funds established at the Boston Foundation since 1915. The Permanent Fund for Boston is the most flexible fund the Boston Foundation holds, giving our staff and board the resources they need to respond to the most critical issues facing contemporary Greater Boston. The following includes donors who have made gifts totaling more than \$5,000 to this fund, with the year of their first contribution noted in parentheses.

Individuals, Corporations and Foundations

Anonymous (2004)
Mr. and Mrs. Pelealter Brooke (1994)
The Boston Company (1991)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
Catherine and Paul Bittenwieser Foundation (2003)
William Putnam Cabot (1970)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation, Inc. (2007)
Michael F. Cronin (2004)
Lawrence and Susan Daniels Family Foundation (2003)
Wm. Arthur Dupee Memorial Fund (1984)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
First National Bank of Chicago (1988)
Martha M. Fosdick Fund (1978)
John Lowell Gardner Fund (1987)
Grand Bostonians Dinner (1984)
Mrs. Jean Hanlon (1991)
Haymarket People's Fund (1994)
HBB Foundation (1995)
Katherine B. Hood (2000)
Donald J. Hurley Memorial Fund (1978)
Jane W. Hyman (2002)
Institute for Affirmative Action (2007)
Mr. Stephen P. Jonas (2007)
Dr. & Mrs. Arthur R. Kravitz (1987)
Mr. and Mrs. Gael Mahony (1982)
The Overbrook Foundation (1991)
Francis Ward Paine Foundation, Inc. (1982)
Harry & Minnie Rodwin Memorial Fund (1975)

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

Estates

Alice A. Abbott (1967)
Matilda S. Alley (1964)
Miriam S. Alley (1965)
Margaret Sears Atwood (1970)
Margaret E. Babcock (1973)
Annie O. Baldwin (1953)
Wilbert S. Bartlett (1969)
Reginald Benting (1984)
William L. Birely (1959)
Edmund Bridge (1933)
Frederick W. Bridge (1942)
Jesse F. Burton (1971)
Susan Cabot (1947)
Charles T. Carruth (1983)
Gladys Chiquoine (1983)
Helen A. 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)
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)
 Richard A. Berenson Family Trust 1972 (2000)
 Nelson Bigelow Trust (1990)
 Mabel M. Brown Trust (1991)
 Ellen E. Carroll Trust U/W (1979)
 Robert M. Christison Trust U/A (1984)
 Ford H. Cooper Trust (1982)
 Anne H. Davis Trust U/Ind (1964)
 Gladys Dean Trust U/Dec (Laurence Guild Dean Fund) (1977)
 Paul Elliott Trust U/Agreement (1991)
 Ruth S. Frake Trust Bequest (1981)
 Carrie A. Hartley Trust U/Ind (1963)
 Helen P. Hennessey Trust (1984)
 Ada H. and Clara Hersey Trust U/Ind (1955)

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

NAMED FUNDS AND FIELD OF INTEREST FUNDS

The following funds are either totally unrestricted or directed to a particular issue or area of concern. Many of these funds were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them. The year the fund was established is listed in parentheses. (Note: Those funds with asterisks received contributions in 2008, and are gratefully acknowledged.)

Adams, Harkness & Hill Fund (1984) unrestricted
 Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics
 Emily Tuckerman Allen Fund (2006) unrestricted
 * Anonymous Fund (1987) unrestricted
 Boston Foundation Arts Fund (1997) for the Boston Foundation's Arts Initiative:
 Edith Allanbrook Fund (2002) to provide for children with extraordinary promise in the area of the arts
 Anna Faith Jones Arts Fund (2000) part of the Boston Foundation's Arts Fund, recognizing and honoring the leadership and service of Anna Faith Jones and her special commitment to supporting the arts
 Edward Hyde Cox Fund (2000) for support of programs involving classical music, painting and/or sculpture

MassDevelopment Arts Fund for Community and Economic Development (2003) A sub-fund of the Boston Foundation Arts Fund, the MassDev Arts Fund was established by MassDevelopment to make grants to arts, cultural and community-based nonprofit organizations conducting arts and cultural development projects or studies that promote
 Stephen and Sybil Stone Arts Fund (2003) to support programs and organizations that provide residents, especially youth and young adults who do not otherwise have the means for involvement, with opportunities to attend and participate in the arts
 Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund
 Edith M. Ashley Fund (1960) primarily for the aid of blind and crippled persons
 * Geno A. Ballotti Fund (1984) unrestricted
 Irene W. Bancroft Fund (1997) unrestricted
 Harriett M. Bartlett Fund (1987) unrestricted
 * Diane Heath Beever Memorial Fund (2008) to support programs that address substance abuse and/or mental illness, with a primary focus on prevention

The Brother Thomas Fund



Brother Thomas Bezanson, a world-renowned ceramic artist who died in August of 2007, created a legacy that will benefit other artists for many years to come through the sale of his ceramic art. The Brother Thomas Fund is a sub-fund of the Boston Foundation Arts Fund, which will help struggling artists who need time, space and other supports to do their work. Brother Thomas,

whose work can be found in more than 50 national and international public collections, including Boston's Museum of Fine Arts, thought of the Fund as his legacy to the future artists in Greater Boston.



- J. E. Adrien Blais Fund I (1967) unrestricted except that "not more than fifty percent" of the income is to be paid to two named agencies and for research and care for the elderly
- J. E. Adrien Blais Fund II (1967) for the relief, support or assistance of poor or needy Massachusetts residents
- J. E. Adrien Blais Fund III (1967) for the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease
- Boston Parks Access Fund (2002) distributions of income will be made on a quarterly basis to the Boston Parks Department or the Arnold Arboretum of Harvard or to the administrators of other public park land within the City of Boston boundaries
- Brother Thomas Fund** (2008) to support organizations and activities that benefit, support, encourage or celebrate struggling artists working in any and all media in the Greater Boston area
- * Franklin S. & Cynthia B. Browning Fund (1988) unrestricted
- 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 (2007) for such charitable work as shall assist young people, particularly women
- Frank B. & Watson G. Cutter Fund (1984) unrestricted

- Mabel Walsh Danforth Fund (1949) for education, assistance or relief of crippled children
- James Dean Fund (1946) unrestricted but with preference for projects of maritime nature
- Virginia Herrick Deknatel Fund for Children's Services (2001) to be used for children's services
- Major Arthur M. Diggles Foundation Fund (1993) to aid Mass. disabled and sick soldiers, sailors and women who have been in the US military, naval or nursing services during any war or to aid any Mass. hospital or institution to care for these individuals
- Annie S. Dillaway Fund (1965) primarily to promote the welfare of boys and girls and young people
- Katherine E. Dooley Fund (1997) unrestricted
- East Boston Chelsea Environmental Fund (2005) for projects, programs and organizations in Chelsea or East Boston, Massachusetts
- Kate Ellis Fund (1953) for convalescents, children, blind and deaf persons, and homes for Protestant aged men and women, especially charities outside of Boston
- Ruby C. Emerson Fund (1966) for the college education of young people of the Protestant denomination
- * Mary C. Farr Arts Fund (2005) for the enhancement of cultural affairs in Boston such as support for the Boston Ballet, for scholarships for needy residents and for support of needy residents of Boston
- Frederika Home Fund (1979) for the benefit and welfare of elderly men and women, and for research into the care of elderly
- Fund for the Environment (formally known as the Fund for the Preservation of Wildlife and Natural Areas) (1994):
 - Allyn Cox Fund for Essex County Greenbelt (1994) for the benefit of the Essex County Greenbelt Association
 - Herbert Farnsworth Fund (1994)
 - New England Forestry Foundation Fund (1996) for the New England Forestry Foundation to aid conservation of forest land in New England
 - Gaywest Farm Fund (1994) for the benefit of Capen Hill Nature Sanctuary in Charlton, Massachusetts
 - General Fund for Preservation of Wildlife & Natural Areas (1994)
 - Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society
 - Hollis D. Leverett Memorial Fund (1994) for the planting and upkeep of trees that protect and encourage wild bird life
 - Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts
 - Edward Glines Fund (1938) unrestricted
- Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the home
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- * Grace L. Holland Fund (2008) 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 (2007), unrestricted
- Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis
- Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye
- Massachusetts Civic League Fund (1983) to promote sound government
- Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes
- Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women
- Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1954) for aid to needy gentlewomen
- Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) to be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care
- Norman Everett Pearl Fund (1996) for recognized charities in the Boston area
- Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, non-profit radio and television stations) providing musical program
- Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River
- Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music
- * David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Ruth M. Reiss Memorial Fund (1997) unrestricted
- Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea
- Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind
- Walter J. & Marjorie B. Salmon Fund (1999) unrestricted
- Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children
- Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people
- * Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs desired
- Sophia Snow Fund (1948) for care and support of destitute children of Roxbury
- Starr Foundation Fund (1985) to alleviate the sufferings of the truly needy in the Greater Boston area in terms of food, clothing and shelter
- Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions
- Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women
- Carroll J. Swan Memorial Fund for Children's Charities (1935) for summer vacations for needy children of Greater Boston
- * Robert Wadsworth Fund for the Future of Boston (2008) unrestricted
- Abraham & Esther Walerstein Fund (1981) for the support of the elderly
- Nelson E. Weeks Fund (1937) for alleviation of suffering in Boston hospitals
- Fanny Wharton Fund (1919) for the relief of sick young women and children
- Katherine C. Wheeler Fund (1987) to increase knowledge of good government and for the encouragement of good citizenship
- Arthur L. Williston and Irene S. Williston Trust For Education (1953) to provide assistance, educational aid and training at institutions other than usual four year colleges
- Mary Denny Williston Fund (1969) for summer camp vacations for children; for work with alcoholics
- * Window Shop Fund (1988) (Marion Gordon Bever Memorial Fund) to provide educational aid including but not limited to the ACCESS Program and other assistance for refugees and foreign born residents of the United States
- Gladys W. Yetton Fund (1969) for widows and single women in straitened circumstances

SPECIAL INITIATIVE FUNDS

The Boston Foundation holds a number of funds that support special initiatives that respond to some of the most pressing challenges facing our community in innovative ways. (Note: Those funds with asterisks received contributions in 2008, and are gratefully acknowledged.)

- * Achieving the Dream Initiative Fund (2007) a multiyear national initiative created to strengthen the ability of community colleges to help students of color and low-income students earn degrees and certificates by using data to close achievement gaps
- After School for All Partnership Fund (2003) for the Foundation's After School Initiative
- * Arts Service Organization Fund (2003) for grants to art service organizations
- * Boston Indicators of Change, Progress and Sustainability Project (1998) to examine Boston's strengths and challenges that impact the quality of life of people who live and work in the City of Boston
- * Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings
- * Civic Engagement Project Fund (2002) to increase nonpartisan voter registration and mobilization in low-income communities and communities of color with low rates of voter participation
- * Civic Leadership Fund at The Boston Foundation (2002) Fund designed to raise outside contributions in support of annual expenses associated with TBF's expanded role as convener and host of major community forums which promote the civic health of our region
- Community Safety Fund (2002) to reduce the rate of violent crime in Boston after years of unprecedented success during the 1990's
- EdVestors Fund (2002) an initiative to educate potential donors about urban school reform issues and to interest them in selected innovative educational projects and programs in Eastern Massachusetts
- EdVestors Collaborative Fund (2003) for nonprofit-school partnerships that enable schools and teachers to achieve their instructional goals
- * English for New Bostonians Fund (2000) for support of the meeting the ESOL Demand program
- * Fund for Racial Justice Innovation (2003) to strengthen partnerships between community-based organizations and lawyers that use legal tools to advance equity resource distribution for communities or groups marginalized by race, color, ethnicity or immigration status
- * High Risk Youth Fund (2007) to build the capacity of Boston-area youth-serving networks and their member organizations to advance positive educational, social and workforce outcomes for high-risk youth through public policy action
- * Home Funders Fund (2002) to help increase the supply of housing affordable to families whose income is below 30 percent of the area median income
- Homelessness Prevention Initiative (2005) to champion the cost-effective strategy of prevention, employing a multi-pronged approach that seeks to demonstrate the effectiveness of a spectrum of programs
- * Initiative for Diversity in Civic Leadership (2007) to for a program to recruit, mentor and train people for public service
- Neighborhood Development Support Collaborative Fund (1993) for a Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations

The SkillWorks Fund

Representing a groundbreaking public/private partnership between several local and national funders, this fund supports SkillWorks, a workforce development initiative created by the Boston Foundation and funded by the City of Boston, the Commonwealth of Massachusetts and a number of other local



and national funders. Since its founding, SkillWorks has provided training for some 3,000 people to work in the health care, automotive and hotel industries. Its innovative approach engages employers, such as hospitals, in the education and training.



- Neighborhood Preservation Initiative Fund (1995) for community development in East Boston
- New Economy Initiative Fund (2001) for grants under the Foundation's New Economy Initiative
- * Pilot Schools Project Fund (2002) for grants under the Foundation's Pilot Schools Initiative
- Polaroid Fund (1997) to help children and adults become more independent and realized their full potential as successful members of society
- President's Initiative Fund (2002) to create the President's Initiative Pre-Development Program Fund
- Program Related Investments Fund (1990) for program related investment loans
- * SkillWorks Fund (2001) a partnership between several local and national funders to focus on job training for disadvantaged job seekers
- * Summer Safety Funders Collaborative (2006) to enable non-profit organizations to expand services and effectively engage high-risk and disengaged teens ages 12-20 in Boston neighborhoods disproportionately impacted by community violence
- Teen Initiative Best Practices Fund (2005) to recognize best practices in teen programming
- * United Way Millennium Fund for Children and Families (1999) an endowment partnership with the Boston Foundation:
 - 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 in perpetuity. Through these funds, many nonprofit institutions receive crucial annual support. The year the fund was established is listed in parentheses. (Note: Those funds with asterisks received contributions in 2008, and are gratefully acknowledged.)

Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston

* Lucy Kasparian Aharonian Memorial Scholarship Fund (2008) for scholarship awards to the Armenian International Women's Association, Inc.

Rae and Aaron Alberts Foundation Fund (2002) to be distributed annually in equal amounts to: the Carroll Center for the Blind, the Perkins School for the Blind, the Vinfen Corporation, the Jewish Family and Children's Services, and the New England Sinai Hospital

Rae and Aaron Alberts Foundation Fund II (2005) to be distributed annually in equal amounts to the Salvation Army, the American Kidney Fund, the American Cancer Society, Children's Hospital of Boston, Massachusetts General Hospital, Combined Jewish Philanthropies of Boston, and the Massachusetts Special

Allied Health Fund (2006) for the Allied Health Worker Initiative

* Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Foundation

Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals

Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs

Arts Awareness Fund (2005) to connect visual artists to opportunities to serve our community's social service agencies and other constituents

Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston

Lilian G. Bates Fund (1951) for three named agencies

Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts

Boston Ballet-E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet

Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association

Boston Baroque Fund (2003) for general operating support of Boston Baroque

Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.

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

Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College

BPE/ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation

Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation

BPE/MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation

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 (2008) for scholarship awards to students at the MATCH School

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

* City to City Fund (2005) for the City to City program

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

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

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

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

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

Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra

concert series to young people in the New England area

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

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

The English High School-John P. Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School

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

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

Benjamin M. Feinberg Fund (1962) for Hebrew College

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

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

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

General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Public Schools Foundation, Inc.

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

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

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

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

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

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

Elizabeth Grant Fund (1980) for five named agencies

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

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

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

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

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

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

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

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

Blanche Hyslop Fund (1982) to three named agencies

Orchestra of Indian Hill Music Director Fund (2002) Annual distributions will be made to the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra's conductors' chair

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

The Jorge Hernández Cultural Center Endowment Fund



Named for the dynamic and inspiring young leader of Inquilinos Boricuas en Accion (IBA), who died at the age of 35, this fund supports Latino music, dance and theater at IBA's Jorge Hernández Cultural Center in the South End. IBA, a community development organization that manages the Villa Victoria housing development, was launched 40 years ago with

help from the Boston Foundation. This year, the Boston Foundation held a special event for donors at the Cultural Center to celebrate their commitment to philanthropy and IBA's 40th anniversary.



- * 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
- Kellogg Foundation Fund for ROCA (2006) a matching fund for ROCA
- John F. Kennedy Library Foundation Endowment Fund (1984) for support of the John F. Kennedy Library Foundation
- Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School
- Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA
- Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society
- Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)
- Gerald V. Levreault & Claire H. Levreault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England
- Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine
- Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation
- Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts
- John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution
- Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency
- Harry D. Neary Fund (1950) for five named agencies
- * New England Aquarium Education Fund (1983) (Robert G. Stone Fund, Paul F. Hellmuth Fund, Helen B. Spaulding Fund, and the William S. Brewster Fund) to support educational programs at the New England Aquarium
- New England Women's Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women's Club Memorial Lecture Series, devoted to the discussion and study of women's history in Boston
- Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science's Internship Program
- * Nixon Peabody Scholarship in Recognition of Retired Managing Partners Robert S. Cummings Scholarship Fund (1997) scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs
- Oak Foundation – Home Funders Fund (2007) to support the Home Funder's program
- Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school
- Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts
- Stephen D. Paine Scholarship Fund (1999) scholarship recipients to be determined by a Massachusetts Cultural Council jury process
- Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library
- William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning
- Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center's Scholarship Program
- Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post-secondary vocational education
- Charles & Cornelia Pfaff Fund (1964) for four named hospitals
- Emma K. & Richard Pigeon Fund (1955) half of income for three named agencies on Cape Cod and half unrestricted
- Pipeline to Public Service Fund (2006) to support the Pipeline to Public Service project
- Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors
- Primary Care Fellowship Program Fund (1983) to support Harvard Medical School's program of preparing general internists for academic careers
- Charlotte F. & Irving W. Rabb Family Fund (1984) for Boston Symphony Orchestra youth programs
- Reading Visiting Nurse Association Fund (1976) for the Combined Visiting Nurse Association of North Reading, Stoneham, Wakefield and Woburn, Inc. for its work in Reading
- Rogers Fund of the Riverside Cemetery (1997) to preserve and maintain the Rogers Mausoleum structures and grounds at the Riverside Cemetery in Fairhaven, Massachusetts
- Henry A. Root Fund (1926) for the Service Pension Society of the Unitarian Universalist Association
- Rose Fund (1981) for the Carol Rabb Goldberg Seminars for Urban Problems at Tufts University
- Fund for Rosie's Place (1984) to benefit Rosie's Place
- Bessie H. Short Fund (1997) for the benefit of elderly residents of the Town of Wrentham, Massachusetts
- Dana P. & Maude E. Simpson Memorial Fund (1998) half of the income for seven named agencies and the other half unrestricted
- Muriel & Otto Snowden Endowment Fund (1984) endowment fund for Freedom House
- Social Law Library Endowment Fund (1982) for the support of various library programs
- Michael Spock Community Service Fund (1980) for support of the Children's Museum outreach services for the Boston community
- Alison L. Stevens Fund (1976) for two named agencies
- Stephen A. Stone Scholarship Fund (2002) Income will be distributed annually to Wareham High School in Wareham, Massachusetts
- Sybil F. Stone Arts Scholarship Fund (2005) for the Sybil F. Stone Scholarship to be awarded to a rising senior with a high portfolio review rating and high level of financial need for senior year tuition reduction
- Miriam & Sidney Stoneman Fund (1984) to benefit Boston Symphony Orchestra youth activities
- Surfmen's Trust Fund (1977) for the Coast Guard Mutual Assistance Fund
- Surkin Endowment Fund (1981) for support of the various projects of the Boston Center for the Arts
- Agnes & Lewis Taylor Fund (1962) for the Orleans United Methodist Church in Orleans, Massachusetts

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

John Larkin Thompson Fund (2007) for fifteen named organizations

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

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

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

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

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

* Stetson Whitcher Fund (1986) to benefit eight named agencies

Ernesto "Tito" Whittington Scholarship Fund (2007) for scholarships to high school students to participate in the social justice programs for youth at the Boston Center for Community and Justice

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

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

Donor Advised Funds

Boston Foundation staff meet donors where they are and help to take them where they want to be. The following is a list of all Donor Advised Funds established by people who choose to be actively involved in the grantmaking process. The year the fund was established is listed in parentheses. (Note: Those funds with asterisks received contributions in 2008. We are grateful to the many donors who have chosen to add to their funds this year.)

A.L.S. Fund (2002)

* AADS Memorial Fund (2004)

* Walter and Alice Abrams Family Fund (2005)

Maida & George Abrams Fund (1985)

* Abromowitz/Ruttenberg Family Fund (2000)

* Acacia Fund (2004)

Ad Club Foundation Fund (1987)

* Adler Family Fund (2006)

* Adobe Foundation Fund (2008)

* Adopt-A-Statue Endowment Fund (1988)

* Aequalis Fund (2008)

Affinity Services Corporation Fund (2003)

Agatha Fund (2004)

Alchemy Arts Fund (1993)

Richard and Kimberlee Alemlian Fund (1996)

* James F. Alenson Memorial Fund (2007)

Aliad Fund (1993)

* Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)

Rosamond W. Allen Charitable Fund (2004)

Dwight & Stella Allison Fund (1982)

Alper Family Fund (1995)

Altamira Fund (1994)

* Amigos de Oaxaca Fund (2008)

George and Nedda Anders Fund (1991)

* Carol and Howard Anderson Family Fund (1997)


* Barbara Jane Anderson Fund (2000)


* Selma and Bayness Andrews Fund (2007)

Michael & Ellen Angino Fund (1997)

Adobe Foundation Fund

The innovative software company Adobe Systems Incorporated, creator of Acrobat®, Photoshop® and other revolutionary technologies, established a Donor Advised Fund at the Boston Foundation this year. In the geographic areas in which Adobe does business, the company engages in innovative community partnerships with the goal of making communities stronger and more vibrant places in which to live, work and do business. Adobe focuses its grantmaking on: hunger and homelessness; arts and culture; the preservation of public spaces; and access to technology for people with disabilities.





Harry Ankeles Scholarship Fund (1992) scholarships for students from Peabody who will graduate from a high school located in Peabody who are seeking undergraduate degrees from accredited colleges or universities

* Anony Fund (1998)

* Anonymous Fund IV (1995)

Ansara Family Fund (2006)

Anthos Family Fund (2004)

* Anthropologists' Fund for Urgent Anthropological Research (1996)

Jim Apteker Fund (2007)

Arba Lifnot Boker Fund (1992)

Atalaya Fund (2004)

* Atlantic Fund (1997)

Ausschnitt Fund (2004)

* Avery Family Fund (2003)

Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)

Katharine & George Baker Fund (1987)

Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)

Richard Balzer Fund (2004)

* Balzer/Bellinger Fund (2008)

BANT Fund (1986)

John & Judith Barber Fund (2002)

* Barnes Family Charitable Fund (2008)

* Richard Allan Barry Fund (2002)



The Bird Fund

Boston Foundation donor Tom Bird takes advantage of the Boston Foundation's 'beyond grantmaking' work by attending *Understanding Boston* forums and reading the reports and other publications the Foundation produces. He is a great proponent of Donor Advised Funds —having opened four of them at the Boston Foundation, including one for his family and even extended family members. "I think many people are interested in giving," he says, "but they don't know quite how to go about it. If they discover how easy the Donor Advised Fund mechanics are, my hope is that it will ignite future participation."

Basil Street Fund (1998)
 Baudanza Family Fund (1997)
 * Baupost Group Charitable Fund (2004)
 * Beachcomber Fund (2008)
 * Bechler Canyon Fund (2001)
 Bellevue Fund (1999)
 * William D. & Mary E. Benjes Fund (1984)
 * Jane Bernstein Fund (2006)
 * Charlotte Saltonstall Bigham Memorial Fund (2004)
 * **Bird Fund** (1999)
 Bitpipe Legacy Fund (2004)
 Linda Cabot Black Fund (1983)
 * NICS/William T. Blackwell Scholarship Fund (1995)
 Emmanuel and Jane Blitz Fund (1992)

* Tom and Lisa Blumenthal Family Foundation Fund (2005)
 Joan T. Bok Fund (1997)
 Boston City Hospital Social Service Fund (1981) for medical social treatment, including rehabilitation, of needy patients of Boston Medical Center; for training costs and other costs of social work students in the Boston area
 * Boston Foundation Pooled Income Distribution Fund (1992)
 Boston Foundation Real Estate Gift Fund (2004)
 BPE/Bank of Boston 200th Anniversary Fund (1982) for support of the Boston Plan for Excellence in the Public Schools Foundation
 Sally and Joseph Braunstein Charitable Fund (2005)
 Braverman Family Fund (1992)
 * Francis J. Bresnahan Educational Scholarship Fund (1986)
 * Bronner Fund (2006)
 * Brooke Family Donor Advised Fund (2008)
 * Peter A. Brooke Fund (1998)
 * Peter W. and Ruth H. Brooke Fund (2004)
 * John F. Brooke Fund (2000)
 * Brother Thomas Advised Fund (2008)
 Bullock Family Fund (1997)
 Burden Family Charitable Fund (1999)
 Denise A. Burgess Fund (2002)
 * Bill and Barbara Burgess Fund (2002)
 William T. Burgin Fund (2001)
 * John A. Butler Memorial Fund (1988)
 Kairos Butler Fund (1994)
 * Butler's Hole Fund (1994)
 C & K Foundation Fund (2000)
 Cabot Family Charitable Trust Fund (2007)
 Norman L. Cahners Fund (1984)
 * Callan Memorial Fund (2008)
 Campbell Foundation Fund (2003)
 Allan R. and Martha M. Campbell Fund (1996)
 A. Bruce Campbell Fund (2002)
 Erin K. Campbell Fund (2002)
 Michael C. Campbell Fund (2002)
 Carpenter Family Foundation Fund (1997)
 * C. Alec and Sarah O' H. Casey Charitable Fund (1993)
 Alice F. Casey Fund (2007)
 Margaret W. Casey Fund (1986)
 Ellen W. Casey Fund (1993)
 John J. Cattaneo III Fund (1984)
 Champa Charitable Foundation Fund (2003)
 * Chasin/Gilden Family Fund (2000)
 Charles Ezekiel and Jane Garfield Cheever Fund I (2006)
 Charles Ezekiel and Jane Garfield Cheever Fund II (2006)
 * Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative
 * Joyce Chen and Helen Chen Foundation Fund (1995)
 * Chertavian Family Fund (2005)
 Christ on Earth Fund (1989)
 Michael W. Christian Memorial Fund (1986)
 Dr. & Mrs. B.U. Chung Fund (1999)
 Chung Family Fund (1999)
 Churchill Family Fund (1997)
 * Circle Fund (1997) priority given to organizations which support grassroots organizing for social change
 CJE Foundation Fund (2007)
 Clarke Fund (1987)
 * Cohen/Lucas Fund (1999)
 Coit Family Fund A (2001)
 Colby Charitable Fund (1980)
 Colette Phillips Scholarship Fund (2004)
 Colony Road Fund (1997)
 Condor Street Fund (1988)
 * Constance and Lewis Counts Fund (1990)
 Coolidge Family Fund (1982)
 Cooper Leeser Family Fund (1997)
 Copernicus Fund (2003)
 * Corvelli Fund (1996)
 Elizabeth Cotter Memorial Fund (2005)
 George D. & Angelyn K. Coupounas Fund (1994)
 Demetrios G. C. & Kimberly A. Coupounas Fund (1996)
 Cregan Charitable Fund (2005)
 Crosby Family Fund (2000)
 * Kate Crozier Fund (2008)
 * Dainger Fund (1997)
 Dammann Boston Fund (2003)
 Paula Marie Danforth Memorial Scholarship Fund (1990) for a student attending either Lincoln/Sudbury Regional Vocational High School or Minuteman Regional Vocational Technical High School
 Darling Family Fund (1983)
 John Da Silva Memorial Fund (1988)
 Todd F. Davenport Family Foundation Fund (2000)

Elizabeth Deming Coxe Fund (1995)
Edward L. and Paula B. DeMore Fund (2003)
* Sarah Derby and Gary MacDonald (2008)
* Marshall and Laura Derby Charitable Fund (2008)
* Rebecca Derby and Evan Morton (2008)
* Deshpande Donor Advised Fund (2007)
deVille Fund (1994)
DeWolfe Family Fund (2000)
Joe DiGeronimo Charitable Fund (2004)
* Dibble Family Fund (2005)
* Larry DiCara Fund (2006)
Phyllis and Jimmy DiGeronimo Fund (2004)
Dillon Fund (2004)
* Dintersmith-Hazard Foundation Fund (2007)
* Dodson Family Charitable Fund (2007)
Doe Noordzij Fund (2001)
Eugene B. & Nina L. Doggett Charitable Fund (1999)
Douglas Drane Family Fund (1984)
Drane Center Fund (2002)
Duggan Charity Fund (1998)
* Dunkin' Brands Community Foundation Fund (2006)
Deborah Dunsire and Michael Hall Fund (2005)
* Dupre-Nunnelly Charitable Gift Fund (2007)
Margaret Eagle Foundation Fund (2000)
Lesser Eber Fund (2005)
Echo Rock Fund (2000)
* A & E Educational Quest Fund (2004)
EdVestors Grantmaking Fund (2003)
Egozy Fund (2007)
* Eisenson Family Fund (2005)
Ellis Family Fund (2003)
Emerging Leaders Fund (2007)
* Employment Retention Fund (2004)
English Family Fund (2005)
* EqualLogic Foundation Fund (2008)
* Ethics Trust Fund (1993)
Evans Family Fund (1999)
Norris & Constance Evans Charitable Fund (1999)
Eagle Bank-Frank E. Woodward Scholarship Fund (1985) scholarships for Everett residents
Excalibur Fund (1999)
* Peter and Ellen Fallon Fund (1997)
FARM Fund (2006)
Fayerweather Fund (1988)
* Marsha Feinberg Fund (2008)
* Robert L. Feinberg Fund (2008)
Martin & Kathleen Feldstein Fund (1986)
Ferdinand Fund (2000)
* Ferrante Charitable Fund (2008)
Fine Family Foundation Fund (2002)
Mark Hayden Fineman Chess Tournament Fund (1985) for awards to pre-high school students of the Nauset Regional School System who have demonstrated the greatest skill in chess
* First Principle Fund (2006)
* Fisher Family Fund (2000)
Fishreys Family Philanthropic Fund (1999)
Gloria A. Flaherty Fund (2003)
Jack Florey Fund (2004)
Florin Family Charitable Fund (2004)
G. David Forney, Jr. Fund (1986)
Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families
* Americo J. Francisco Charity Fund (1998)
Americo J. Francisco Scholarship Fund (1993)
* Freeman/Kelly Family Fund (2005)
* Niki & Alan Friedberg Fund (1986)
Orrie M. Friedman Charitable Fund (1995)
Fryou Fund (2005)
Fulkerson Family Fund (1998)
Davis R. Fulkerson Fund (1999)
Lyle W. Fulkerson Fund (1999)
Sarah Fulkerson and Robert Le Roy Family Fund (1999)
Fulton Family Fund (2006)
Future Fund (2006)
Gabriel Family Fund (2001)
Gabrieli Family Fund (1997)
Gaffney/Kames Foundation Fund (1997)
* Galilean Fund (2008)
Ganesh Fund (2001)
* Gannon Family Charitable Fund (2003)
* John Lowell Gardner Fund (1986)
R. Abel & Nancy L. Garraghan Fund (1986)
Dave Garroway Fund (1982)
* Garuda Fund (2008)
Brad Gatlin Family Fund (1995)
Gaudette Family Fund (2000)
* Gilbert Fund (2008)
Carl J. Gilbert Fund (1984)
* Albert Francis Gilmartin Memorial Scholarship Fund (2005) for students of Quincy, MA, residing in the Houghs Neck area
* Giving Three Fund (2007)
Gladstone Family Charitable Fund (2003)
Robert and Linda Glassman Fund (1985)
Globe Mallow Fund (2000)
John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine
Carol R. & Avram J. Goldberg Fund (1983)
* Golden Family Fund (2000)
* Rachael P. & Andrew P. Goldfarb Fund (2000)
Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
Louis & Phebe Goodman Fund (1996)
Goodworks Fund (2002)
Gordon Educational Fund (2001)
Sandra & Philip Gordon Family Foundation Fund (2001)
* Robert L. Gould Fund (1987)
* Gravelley Springs Fund (2005)
Raymond C. & Joan C. Green Fund (1984)
Patricia H. Gross Fund (1999)
Grunebaum Charitable Fund (2007)
* Gualala Fund (1991)
* Charles & Dorothy Gullickson Fund for Social Change (1998)
* H. Family Fund (2003)
* Mary Haas and Ronald Leavitt Donor Advised Fund (2001)
Jay Habegger and Christine Nagle Fund (2004)
Charles Hammond Fund - Hanover (1972)
Charles Hammond Fund - Springfield (1972)
* W.J. Hannigan Family Fund (2004)
Ken and Becky Hansberry Fund (2001)
Charlotte C. Hart Family Fund (2001)
Tim and Elisabeth Hasselbeck Charitable Fund (2005)
J. Allan Hauter Memorial Fund (2004)
James E. Hayden Charitable Fund (2001)
Hebb Charitable Fund (2003)
HEIRS Fund (1996)
Heitman Family Fund (1994)
Hel lyn Fund of Boston (1998)
Helies Family Fund (2000)
Elizabeth D. Heller Fund (1987)
Henderson Fund (1996)
Henry Fund (1986)
E. Byron Hensley Jr. Charitable Fund (1993)
Herzog Family Charitable Fund (2004)
William H. and Jodi A. Hess Charitable Fund (2005)
* Hewitt Family Charitable Trust Fund (1993)
Ann S. Higgins Fund (2001)

* Lucius T. Hill III and Wendy Y. Hill Fund (2000)

* Petie Hilsinger Fund (1999)

Hingham Education Foundation Fund (1995)

Marc Hirschmann Foundation Fund (2002)

Margaret Hixon Fund (2007)

Hobart / Toole Charitable Fund (2004)

Hoffman Fund (1986)

* Holberger Family Fund (1993)

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

Holland Family Fund (1993)

Ron and Cheryl Homer Fund (2005)

* Gilbert H. Hood Family Fund (1980)

Robert Hooper Family Fund (2004)

* Hourless Fund (1997)

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

M. Benjamin Howe Fund (1997)

Hoyt Family Fund (2000)

Hunt Fund for Children (2001)

Investing in the Future Fund (2000)

Ipswitch Fund (2000)

* Iron Mountain Education Fund (2004)

* J. Jill Compassion Fund (2002)

* Mitchell & Diane Jacobs Fund (1998)

* Jade House Fund (2008)

JAHELBE Fund (2002)

* Cynthia & Andrew Janower Charitable Fund (2007)

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

* Jochkan Charitable Fund (2001)

Stephen G. & Rosemarie Torres Johnson Family Fund (2000)

Jonas Family Fund (2000)

Hubie Jones Fund (2004)

Samuel Lamar Jordan Trust Fund (2000)

* Elizabeth Trichel Joyce Family Fund (2007)

* JP House Sale Fund (2008)

Jumping Rock Fund (2000)

* Kalman Family Fund (1996)

Beton M. Kaneb Fund (1983)

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

* Patricia A. Kaneb Fund (2003)

Martin & Wendy Kaplan Fund (2007)

Steven E. Karol Charitable Foundation (1999)

* Kassler Family Fund (2000)

Stephen and Caroline Kaufer Charitable Giving Fund (2004)

Kaye Charitable Fund (2003)

* John & Anne-Marie Keane Foundation Fund (1997)

Kearney Family Fund (1995)

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

* Keewaydin Fund (2001)

Sabina F. Kelly Catholic Charitable Fund (1991)

* Keogh Family Fund (2000)

Khudari Fund (2005)

* Kidder SBSM (Strong Body, Strong Mind) Fund (2005)

* Kidder Smith Fund (2003)

* M. R. Kidder Charitable Fund (2004)

KJN Family Fund (1997)

Kluchman Family Fund (1997)

Allen and Elizabeth Kluchman Fund (1997)

Klureza Family Fund (1997)

Knopf Family Charitable Fund (2004)

Pamela Kohlberg Fund (1995)

* Kopacz Charitable Gift Fund (2003)

Stephen P. Koster Fund (1985)

Ronni Sachs Kotler Family Fund (2007)

Kravitz Family Fund (1993)

Anna Krezwick Fund (2002)

Joseph and Lisa Krivickas Family Fund (2007)

Clara K. Kupferschmid Childrens' Fund (1998)

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

* G. Barrie Landry Fund (2005)

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

* Barbara Lee Family Foundation Fund (2004)

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

C. Martin Leinwand Fund (1986)

Colman & Carol Levin Fund (2000)

Levine Family Charitable Fund (2003)

Joan & Theodore Levitt Family Fund (2000)

* Lewis Family Fund (2008)

Charlotte Ruth Lewis Fund (1998)

Edward Bernard Roland Lewis Fund (1998)

* Henry R. Lewis Family Fund (2008)

Southard Lippincott Fund (1996)

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

LMG Fund (1997)

Joan Locatelli Foley Memorial Fund A (1997)

Joan Locatelli Foley Memorial Fund D (1997)

GC & JW Lodge Fund (2000)

* Loomis Sayles Fund (2008)

Lord-Buck Fund (1996)

Lovett-Woodsum Family Fund (1998)

Bruce Lunder Fund (1982)

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

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

Magic Penny Fund (1997)

Mahoney Family Fund (1983)

William G. Markos Fund (1982)

Evelyn A. Marran Fund (1983)

Martin Fund (1998)

* Mason-Brown Fund (2008)

* Sydell and Edward I. Masterman Fund (1997)

* Match School Scholarship Fund (2008)

Mayel Fund (1982)

Richard & Judith McGinnis Fund (1999)

Eleanor P. McIntyre Fund (2001)

McNeill Family Fund (1997)

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

Medugno Family Fund (2006)

Emily & Bernard H. Mehlman Fund (2002)

* Mellows Fund (1998)

* Leila Yassa & David Mendels Fund (2000)

* Gilbert G. Menna Family Fund (1999)

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

Jack and Beth Meyer Foundation Fund (2007)

* Allan Meyers Fund for the Advancement of Careers in Disability (2000)

Michon Family Fund (1986)

* Microsoft Unlimited Potential Fund (2005)

* Mid-Century Fund (2004)

J. F. Middleton Family Fund (1995)

* Mill River Foundation Fund (2004)

* Joseph Morton Miller Family Fund (1998)

Gabrielle J. Miller Donor Advised Fund (2004)

* Anita L. Mishler Education Fund (1983)

Moccasin Brook (2000)

* Molino Family Fund (2003)

Monadnock Fund (2002)

* Moose and Squirrel Fund (2007)

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

Mormann Family Fund (2007)
 Morris Advised Fund (2000)
 * Sykes Moyer Fund (2005)
 * Muddy Pond Trust Fund (1994)
 David G. Mugar Fund (1998)
 * Mullen Family Fund (2001)
 Munger Family Fund (2001)
 * Murray Hill Charitable Fund (1995)
 * Musinsky/Krieger Fund (1996)
 Myrtle Field Fund (2004)
 Mystic Harmony Fund (2000)
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
 Narnia Fund (1986)
 * Tami E. Nason & Kent A. Lage Fund (2005)
 Jean F. and David G. Nathan Fund (1986)
 * Paul F. Nagle Memorial Fund (2007)
 Neumann Family Charitable Account Fund (2003)
 * New Beginnings/Kidder Fund (2004)
 * Next Door Fund (2005)
 North Conway Institute Fund (2001)
 * Chad & Lia Novotny Fund (2002)
 Kathryn Novotny Fund (2007)
 Nicholas Novotny Fund (2007)
 * Novotny/Ramirez Donor Advised Fund (2002)
Novotny/Swahnberg Fund (1997)
 Ohrn Family Fund (2000)
 Ones Fund (2004)
 O'Brien Family Fund (2007)
 * Thomas J. O'Neil Memorial Fund (2007)
 Richard T. O'Rourke Fund (1988)
 * Orpheus Fund (2002)
 * Palisades Fund (1986)
 * Morgan Palmer Charitable Fund (1982)
 * Pappas Fund (2008)
 John J. Pappenheimer Fund (1995)
 * Parker Family Fund (2000)
 Field Parker Fund (1996)
 Richard J. Parker and Donna K. Sherman Charitable Fund (2003)
 Partnership Fund in honor of Anna Faith Jones (2001)
 * Alfred Nash Patterson Foundation for the Choral Arts Fund (1979) for the encouragement of composition and performance of new works of choral music and for the support of choral group activities
 Payne's Creek Fund (2001)
 * Payson Family Fund (2000)
 * Robert Myles Pearson Memorial Fund (2008)

The Novotny/Swanberg Fund

For Judith Swahnberg and Carl Novotny, who opened a Donor Advised Fund at the Boston Foundation 10 years ago, philanthropy is a way to recognize their own personal power and to have an impact on the issues and communities



that are important to them. The couple takes advantage of the resources of the Foundation not only to handle the process of grant-making but to evaluate the nonprofit organizations they are interested in supporting. A large portion of their grantmaking goes to health care programming and education.



Peeler/Kellogg Fund (1999)
 Samuel Perkins and Nancy Reed Fund (1996)
 Sheila and Sara Perkins Fund (1996)
 Perkins Improvements Fund - William (1996)
 John A. Perkins, Jr. Fund (2000)
 John & Lydia Perkins Fund (1999)
 Robert C. Perkins Fund (2000)
 Thomas Perls Fund (2004)
 Roger Perry Memorial Fund (1999)
 Peter Fund (2000)
 * Petersen Family Fund (2001)
 Kevin Phelan Fund (2004)
 Philancon Fund (1990)
 Katherine A. & Fannie Phillips Fund (1997)
 Picard Family Fund (2000)
 Jamie Pierce & Rick Cresswell Fund (2002)
 Pitts Family Fund (1997)
 * Plimpton - Shattuck Fund (2005)
 Renata Poggioli Fund (1991)
 Pool Family Fund (1997)
 William Townsend Porter Fund (1998)
 Poss-Kapor Family Fund (1996)
 Pride in Scholarship Fund (1992) for scholarships to students whose academic work & individual contributions to the arts, sciences or business best serve & promote the gay & lesbian community
 * Fred & Ruthann Prifty Fund (2001)
 Thomas & Mary Prince Family Fund (2000)
 * Sue and Bernie Pucker Fund (2002)
 Donald and Frances Putnoi Charitable Fund (2007)
 Peg Pyne Fund for Handicapped Access (1985) to make congregations accessible to handicapped worshippers
 Quid Nunc Fund (2001)
 Quinn-Jacobs Family Fund (1992)
 Sidney R. & Esther V. Rabb Family Fund (1983)
 Barbara & Yale Rabin Fund (2002)
 Radtke Family Fund (1996)
 Richard E. & Mary F. Rafferty Fund (2007)
 * Emma W. Ramstad Fund (1998)
 * Otto W. Ramstad Fund (1998)
 Bessye Bedrick Ravelson Fund (2003)
 * Raytheon Company Matching Gifts for Education Fund (2001)
 * Gene Record Fund (2002)
 Sara Delano Redmond Fund (1996)
 Regan Family Charitable Fund (2005)
 Robert B. Reich Fund (2000)
 Remmer-Fox Family Fund (1995)
 Renaissance Fund (1998)
 Reno Family Charitable Foundation (1998)
 Edward S. Reynolds Memorial Fund (1984)
 Russell & Carla Ricci Fund (1985)
 * Rich Florin Family Fund (2005)
 * Riptide Fund (2002)
 Jonathan Rizzo Memorial Foundation Fund (2001)
 * RMB Fund (2008)
 Thomas Roberts Fund (1995)
 * Roberts-Belove Fund (2004)

Robynhood Thanksgiving Fund (2002)
 Rodgers Community Fund (2004)
 * Rosen Family Fund (2008)
 Rosedune Fund (1970) especially for educational and cultural programs, primarily for children
 Andrew L. & Leslie (George) Ross Fund (2003)
 * Daniel and Brooke Roth Charitable Gift Fund (2008)
 * Rotman-Attardo Family Fund (2005)
 Rotten Dock Fund (1988)
 * Roy/Thompson Family Fund (2000)
 * Roy-Thompson Family Fund (2008)
 * Dr. Jordan S. Ruboy Charitable Fund (1998)
 Russell Family Charitable Gift Fund (2005)



The Charles S. and Zena A. Scimeca Charitable Fund

When their parents died, the four adult children of Charles and Zena Scimeca decided to take the private foundation established by their father, and turn it into a Donor Advised Fund at the Boston Foundation. By letting the Foundation handle the mechanics of the fund, the four siblings have time to focus on the organizations they want to support, including the Dana Farber Cancer Institute and nonprofits working in the area of international health and the regional environment.

Russell-Oliver Family Fund (1997)
 * Rust Bowl Fund (1987) for the benefit of cultural arts, including theatre
 Robert Sachs & Caroline Taggart Gift Fund (1998)
 * Saffron Circle Fund (2006)
 Salmon Family Charitable Fund (2007)
 * David Salten Fund (2008)
 Risha C. and Paul A. Samuelson Fund (1982)
 Kazanjian Sargeant Fund (1996)
 * Gary P. and Kimberly H. Savage Charitable Fund (2008)
 Schawbel Family Fund (1995)
 * Margaret M. Schmidt and Kenneth J. Danila Fund (2004)
 Schott Fund (1999)
 Schumann Family Fund (2005)
 Joel Schwartz Family Fund (2000)
Charles S. and Zena A. Scimeca Charitable Fund (2004)
 Francis P. Sears Scholarship Fund (1973)
 Gerald Segel Fund (1981)
 Seim Fund (2003)
 September Fund (2000)
 * Norman J. & Maryellen S. Shachoy Fund (1997)
 * Shadow Lake Children's Fund (2002)
 Shames/Egasti Fund (1991)
 Shapiro/Fleishman Fund (1999)
 Douglas Boyd Sharpe Donor Advised Fund (2007)
 Shawkemo Fund (2000)
 Sherborn Fund (1997) for the benefit of charitable organizations, activities, and residents of Sherborn, Mass
 * K.A. and P.R. Sherbooke Family Fund (2008)
 * Sherman Family Foundation Fund (2005)
 Shields Family Fund (2006)
 * William U. & J.W. Shipley Fund (2001)
 Shoe Box Foundation Fund (2004)
 Jean Karpas Siegel Fund (1994)
 John and Susan Simon Boston Foundation Fund (2007)
 * Ellen L. Simons Fund (1997)
 Steven and Karen Sisselman Family Fund (2005)
 63 Marlborough Street Fund (1984)
 Skylight Fund (2000)
 Ellin Smalley Fund (1987)
 * Smith Family Charitable Fund (2004)
 Austin & Susan Smith Fund (1999)
 Walter A. & Hope Noyes Smith Fund (1985)
 J. Alper Smith Fund (1996)
 Clark R. Smith Fund (1990)
 * Social Venture Partners - Boston Fund (2001)
 Society of Women Engineers-Boston Fund (1996)
 Lawrence and Lillian Solomon Fund (2007)
 Somerville Fund (1996)
 Nancy and George Soule Family Fund (1997)
 * Spector Fund (2001)
 * Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund (2007)
 * David F. Squire Family Fund (1997)
 Aaron Stein Fund for Group Psychotherapy (1983)
 * Harvey & Shirley Stein Fund (1999)
 * Stewart Fund (2006)
 Stewart-Holtzman Fund (2001)
 Stone Charitable Fund (1999)
 Stone Family Fund (1999)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 Stonehill Enrichment Fund of the Ames Free Library (1994)
 Robert Strange Family Fund (2003)
 * Congressman Gerry E. Studds Fund (2007)
 Sugarman Fund (1982)
 * Charles Sugnet Fund (1998)
 * Joshua Sugnet Fund (1998)
 Suhrbier Family Fund (2005)
 Nancy L. Sullivan Fund (1989)
 Diane Sullivan-Villano Fund (1998)
 * Sunrise Fund (1993)
 Sustainable Future Fund (2003)
 Sylvan Fund (1985)
 TechFoundation Fund (2002)
 Tempero Family Fund (2002)
 * Marc C. Thompson Family Fund (2008)
 Thomsen Family Fund (2000)
 * Susan and Michael Thonis Fund (2005)
 * Thorvale Fund (2008)
 Tiare Fund (1996)
 * Scott and Jennifer Tobin Charitable Fund (2004)
 * **Topol Family Fund (1991)**
 Gerard B. Townsend Charitable Fund (1995)
 * Treffler Fund (1997)
 * Tye Charitable Fund (2007)
 Thomas & Lois Valeo Fund (1982)
 Valette Family Charitable Fund (2001)
 Joseph Bishop Van Sciver Fund (1861-1943) (1997)

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

- * Nancy J. Vickers Fund (2007)
- * Villers Fund (1997) to support the Community Catalyst program
- Vizzini Fund (1997)
- M. Volpe Kluchman Fund (2005)
- * Ann & Robert von der Lippe Fund (1997)
- * JH & EV Wade Fund (1990)
- James and Margaret Wade Fund (1997)
- Wainwright Bank Community Fund (1998)
- * Walker Fund (1998)
- Ruth & Henry Walter Fund (1982)
- J. H. & C. K. Walton Fund (1986)
- Warner Charitable Gift Fund (2000)
- * Waterfield Fund (2002)
- * Mimi Chandler Watt Fund (2008)
- Sally Sutfenfield Webb Fund (1998)
- Weiss Charitable Fund (2004)
- Jack and Kathleen Welch Fund (2001)
- Wellesley Hills Congregational Church Outreach Fund (2007)
- Lois & David Weltman Fund (1991)
- Annie Evans White Memorial Fund (1970) for the benefit of needy persons of Winchendon, Massachusetts
- Frank & Jean White Fund (2001)
- Janet White Memorial Scholarship Fund (2004)
- * William B. and Janet McCormick White Fund (2008)
- * Whitehead – Sayare Fund (2007)
- Whittier Family Charitable Fund (2005)



The Topol Family Fund

With a deep commitment to diversity in education, Sid and Libby Topol, both of whom graduated from the Boston Public Schools, established a Donor Advised Fund at the Boston Foundation in 1991 to conduct their philanthropy and, in the process, have an impact on the future of education. Through their fund, the Topols have created a scholarship for minority stu-

dents at Simmons College and made grants to strengthen Boston Latin, including a scholarship program that helps minority students from Boston Latin attend the University of Massachusetts Amherst.



- 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)
- Witkowitz Charitable Fund (2005)
- Jack & Judith Wittenberg Fund (1997)
- Howard L. Wolf Memorial Fund (1981)

- Karin E. Wood Fund (1993)
- Michael N. Wood Fund (1996)
- * Fund for World Class Schools (2008)
- Wurcer-Kleiner Fund (2005)
- Paul & Eleanor Young Fund (1988)
- Zabin Charitable Fund (2001)
- Zarkin Family Fund (2001)
- Sylvia and Robert Zell Fund (1988)
- Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals
- * T. Zouikin Charitable Fund (2003)
- Zwanziger Fund (2007)

Support Organizations and Other Special Funds

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

James R. Bancroft Trust (1953) income to be paid to the Boston Foundation for general purposes

Boston's Fourth of July Foundation, Inc.

Deshpande Foundation (2007)

Horace Moses Foundation (1995) to support Junior Achievement

* James M. and Cathleen D. Stone Foundation (1994)

2008 FINANCIALS

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

Fund for the 21st Century

The Foundation's assets are professionally managed in a pool known as the Fund for the 21st Century. The Fund has a long-term time horizon, and is structured with the objective of achieving returns in excess of the targeted spending policy, costs and inflation. Total assets as of June 30, 2008 were \$924 million, up from \$897 million in the prior year.

Financial Oversight

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

The Boston Foundation takes a total return approach to investment management under the Uniform Management of Institutional Funds Act (UMIFA). Total return is a term used to describe the total change in fund value over a given time period

resulting from both interest and dividends, and capital appreciation (realized and unrealized gains). Investing for total return, as opposed to just investing for interest and dividends, allows the Foundation to capture a portion of the historically higher appreciation in the equity and equity-like markets for grant-making purposes.

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

Performance as of June 30, 2008

	1 Year	3 Year	5 Year	Since Inception 10/1/1999
Fund for 21st Century (net of investment fees)	-0.6%	10.4%	11.7%	6.2%
S&P 500 Index	-13.1%	4.4%	7.6%	0.9%
Lehman Brothers Aggregate Index	7.1%	4.1%	3.9%	6.1%

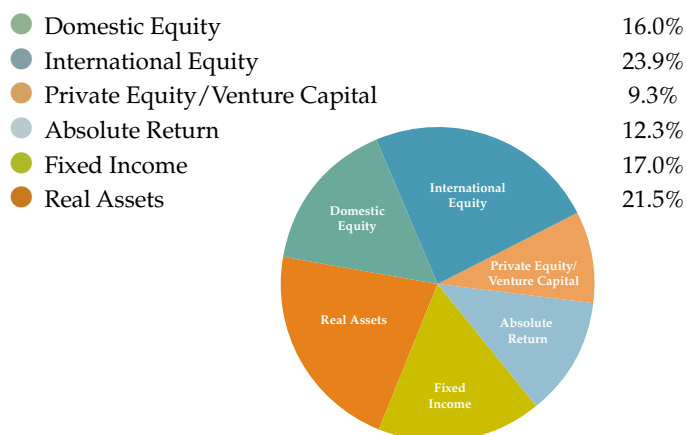
The Spending Policy

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 2008 spending rate was 6% for all endowed Boston Foundation Funds. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year plus 30% of the 6% spending rate applied to the current market value.

Socially Responsible Investing and Proxy Voting

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

Asset Allocation as of June 30, 2008



stock. The Foundation focuses its proxy voting on key issues including the environment, community well-being, diversity and equity and good corporate governance.

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

Audited Financial Statements

The Foundation's financial statements were prepared under strict policies and procedures overseen by the Foundation's independent Audit Committee and, ultimately, the Board of Directors. The statements were audited by KPMG, LLP. KPMG has issued an unqualified opinion on the financial statements for the year ended June 30, 2008. A summary of the financial statements is shown here, but copies of the full financial statements are available on our web site at www.tbf.org or by calling the Foundation's offices at 617-338-1700.

Expense Control

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

2008 SUMMARY FINANCIAL STATEMENTS

(unaudited, in thousands)

Assets:

Receivables	\$ 14,179
Investments	876,221
Other	33,336
Total Assets	\$ 923,736

Liabilities & Net Assets:

Accounts Payable and Accrued Liabilities	\$ 19,409
Grants Payable	6,222
Other	1,418
Net Assets	896,687
Total Liabilities & Net Assets	\$ 923,736

Revenues:

Contributions	\$ 112,984
Net Investment Return	(5,435)
Total Revenues	\$ 107,549

Grants & Expenses:

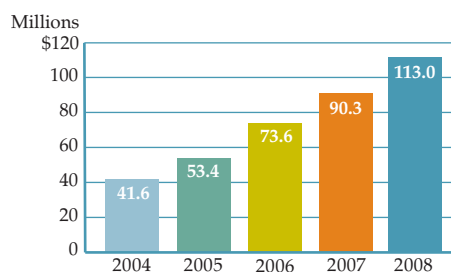
Grants	\$ 78,664
Change in Split Interest Trusts	(497)
Program Support	4,218
Operating Expenses	8,798
Total Grants & Expenses	\$ 91,183

Change in Net Assets	\$ 16,366
Net Assets Beginning of Year	\$ 880,321
Net Assets End of Year	\$ 896,687

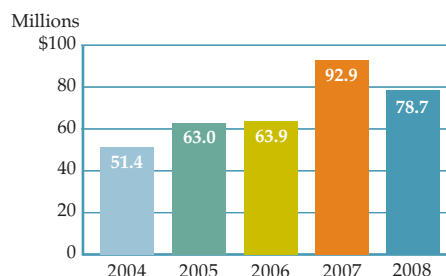
Increased Growth from 2004 through 2008

Gifts to the Boston Foundation have steadily and significantly grown over the last five years, increasing the Foundation's total assets to \$924 million. In 2008, the Foundation set an all-time record for gifts received and total assets, while continuing to make significant grants.

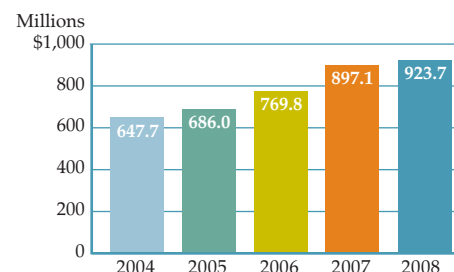
Gifts Received



Grants Paid



Total Assets





Communications Department Staff (seated, from left): Maura Fogarty, Jessica Martin, and Barbara Hindley.
(Standing, from left): Mary Jo Meisner, Jim Rooney, Tim Gassert, David Trueblood, Charlotte Kahn, Stephen Sullivan, and Tim Davis.

Acknowledgments

Editor Barbara Hindley *Designer* Katherine Canfield *Photographer* Richard Howard *Printed by* Kirkwood Printing

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