

# Responding Seeding Changing

1915



2015



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# About the Boston Foundation

**T**he **Boston Foundation**, Greater Boston's community foundation, is one of the largest community foundations in the nation, with net assets of some \$1 billion. In 2015, the Foundation and its donors paid \$135 million in grants to nonprofit organizations and received gifts of nearly \$123 million. In celebration of its Centennial in 2015, the Boston Foundation launched the Campaign for Boston to strengthen the Permanent Fund for Boston, the only endowment fund focused on the most pressing needs of Greater Boston. The Foundation is proud to be a partner in philanthropy, with more than 1,000 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Boston Foundation also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), an operating unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations around the globe.

## Our Mission

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

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

## Values Statement

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

# The Boston Foundation's Centennial **By the Numbers**

**1<sup>st</sup>** Community foundation to receive a major bequest and make grants

**116** Number of new nonprofits and great ideas for which the Boston Foundation was "There at the Beginning" with critical early funding

**\$1.6 Billion** Total grants made since 1915

**\$1.1 Billion** Total grants made since 2001 alone

**\$192 Million** Dollars raised for the Foundation's endowment, the Permanent Fund for Boston, during 2015

**\$15 Million** In outright gifts of \$1 million each from generous Boston philanthropists to the Permanent Fund for Boston during 2015

**3,900** People who attended Centennial events in 2015

**\$1 Million** Raised by the 100th Anniversary Gala Dinner to benefit the Permanent Fund for Boston and community grant making

# Letter from the Chair

**I cannot help but be impressed by both the breadth and the depth of the Foundation's impact on our community.**

**A**s one who has had the privilege of serving as Chair of the Board of Directors of the Boston Foundation since 2009, I cannot help but be impressed by both the breadth and the depth of the Foundation's impact on our community. That impact has never been as evident as it was in 2015, when the Foundation's work over the course of the last century was acknowledged and celebrated during our Centennial.

This is my last letter as Chair of the Board of Directors of the Boston Foundation, and I want to begin by thanking the dedicated and talented members of the Board, especially Catherine D'Amato, who served as Vice Chair during most of my tenure, and Paul La Camera, who succeeded her in that role.

I won't single out others because, to a person, they are deeply dedicated to guiding this institution in all of its multifaceted roles in the community—as grant maker, civic leader and a partner with donors.

I want to acknowledge—and thank—our excellent staff for guiding us through an outstanding Centennial year. And I particularly want to thank Paul Grogan for his groundbreaking leadership over the last 15 years. By expanding the work of the Boston Foundation to include civic leadership, he not only has transformed the role that philanthropy can play in our city, he has made the Boston Foundation a leader among community foundations nationally.

I also want to thank Mary Jo Meisner for her tremendous contributions to the Foundation's civic leadership work over the last 15 years and for leading the remarkable celebration of the Foundation's Centennial.

I am deeply grateful to the Boston Foundation's donors who so generously contribute to our annual drive for the Civic Leadership Fund and all who have established Donor Advised Funds at the Boston Foundation. Choosing to conduct your philanthropy through Greater Boston's community foundation strengthens the entire organization.

Finally, I want to pay tribute to those generous philanthropists who helped us launch the Campaign for Boston, designed to strengthen our endowment, the Permanent Fund for Boston, which provides the flexible funds that support everything the Foundation does in Greater Boston.

As a special Centennial drive, we had the goal of raising \$10 million in outright gifts from Boston's leading philanthropists. We received \$15 million. We had an overall goal of raising \$100 million in both outright and legacy gifts during 2015 and we raised almost twice that amount.

That campaign continues because building the Permanent Fund for Boston strengthens the future of this important organization.

In my first letter as Chair, I wrote that I considered the Boston Foundation to be nothing less than the social conscience of Greater Boston. I repeat that sentiment here. I have been honored to be a part of this important organization.

Michael B. Keating, Esq., *Board Chair, The Boston Foundation*

# Report of the President

**T**he year 2015 was a remarkable one for the Boston Foundation. We celebrated our 100th Anniversary and, in the process, learned a tremendous amount about our history and how it influenced, and was influenced by, the city we serve.

One factor made the Boston Foundation unique among all of the community foundations that were founded around the same time in other American cities. A man named James Longley, a mill owner and businessman, left a totally unrestricted bequest of \$4 million to the Boston Foundation's endowment, the Permanent Fund for Boston, just a year after the Foundation opened its doors. It was Longley's entire fortune and today would be worth some \$85 million.

His bequest gave the Foundation the capacity to be the first community foundation in the country to make grants.

That initial, incredibly generous bequest meant that, from its earliest days, the Boston Foundation had the flexible capital it needed to invest in Boston's nonprofit sector. As the Permanent Fund for Boston grew, the Foundation's leaders began to invest in new, untried ideas. Innovation became part of the Foundation's DNA. Eventually, it had the resources to bet on more than 100 great ideas that worked. The entire list can be found in this Annual Report.

Many of the great ideas and nonprofit organizations the Foundation supported helped to create an urban renaissance for this city. And today, Boston is one of the most vital and dynamic cities—not only in the country, but in the world.

Now, however, is not a time for complacency. We have to be vigilant. We have to preserve the gains that have been won and we have to be smart and determined about taking on the next set of challenges. And they are daunting.

The opportunity gap. The lack of affordable housing. Too many schools that still don't work. Too many people who can't get a foot on the first rung of the ladder of opportunity. There's plenty to do.

Our promise in this first year of our second century, is to bring all of our capacities to the task: the research we commission, the grants we make, the forums we host, the partnerships we have with donors, the public policy options we explore and support, the alliances we forge.

Together, let's resolve to make Boston the opportunity capital of the nation, where upward mobility is not the exception, but the expectation.

I want to end this year's report with a word about Mike Keating, who has served as the Chair of our Board of Directors since 2009 and ends his tenure this year. He has provided a steady hand at the helm and guided the Board with intelligence, commitment and kindness. He will be terribly missed by all of us, but we plan to continue to engage him in our work. We can't afford to lose track of Mike Keating because he's one of a kind.

Paul S. Grogan, *President & CEO, The Boston Foundation*

**We have to preserve the gains that have been won and we have to be smart and determined about taking on the next set of challenges.**





# Centennial Timeline: January–December 2015

It was a year packed with small and large-scale events focused on the role the Boston Foundation has played in the past and on the most serious challenges facing our city in the future.

The Foundation began the year with a large conference that explored income inequality, climate change and infrastructure; went on to work closely with community groups to mount a joyous Centennial celebration in Boston neighborhoods—and capped the year with a 100th Anniversary Gala Dinner that raised \$1 million for the Foundation’s endowment, the Permanent Fund for Boston. During 2014 and 2015, the Boston Foundation also held a series of Centennial Dinners—intimate gatherings focused on some of the most important issues facing Boston in the future. And in the spring of 2016, we honored our donors with “Philanthropy Matters,” a dinner and conversation with the distinguished surgeon and author Dr. Atul Gawande.

In addition, the Foundation published two Centennial books, launched a special Centennial website and unveiled new exhibits. And it launched the Campaign for Boston, which raised \$192 million in 2015 alone for the Permanent Fund for Boston, the endowment which supports all of the Foundation’s work in Greater Boston.

**MARCH 9**  
**Centennial Dinner**  
on  
**Opportunities for Young Adults**



**JANUARY 1**

**Centennial Website Unveiled at tbf100.org**

With a 100-entry history timeline, a special “There at the Beginning” section and access to videos and publications



**FEBRUARY 2**

**The Shape of the City**

A major civic leadership signature conference explores the themes of income inequality, infrastructure and climate change

**FEBRUARY 19**  
**The Boston Foundation in the City of Ideas 1915-2015** is released at a party attended by Mayor Walsh, who received a snow shovel for his handling of the 2015 blizzards





**MARCH 16**  
**Centennial Dinner**  
on  
*Immigration Reform*

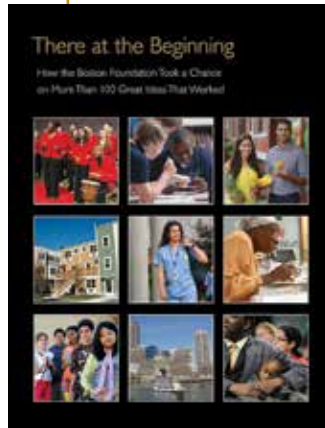


**MAY 13**  
**Centennial Dinner**  
on  
*Housing and Community Development*

**MAY 27**

***There at the Beginning***  
**Book Published**

About how the Boston Foundation took a chance on more than 100 great ideas that worked



**JUNE 23**

**Opportunity Forum**

*Our Kids: The American Dream in Crisis* with author Robert Putnam



**APRIL 30**

**New Exhibits Installed**

Including a history timeline, a “There at the Beginning” installation and interactive exhibits on the Foundation’s donors



**JUNE 8**  
**Centennial Dinner**  
on  
*Increasing K-12 Education Success*



**SEPTEMBER 21**  
**Centennial Dinner**  
on  
*Higher Education*





**SEPTEMBER 22**  
**Opportunity Forum**  
On the Crucial Early  
Childhood Years



**OCTOBER 28**  
**Opportunity Forum**  
Educational and Skills  
Pathways to  
Economic Security



**NOVEMBER 19**  
**Centennial Dinner**  
on  
*Health and Health Care*



**DECEMBER 2**  
**100th Anniversary  
Gala Dinner**  
More than 1,000  
people experience a  
rousing program, and  
\$1 million is raised for  
the Permanent Fund for  
Boston and community  
grant making



**OCTOBER 23**  
**Lighting the Line  
Community Celebration**  
A “moving” neighborhood  
celebration on the  
Fairmount/Indigo  
Commuter Rail Line and a  
gift from the Foundation to  
the community of a lighting  
installation for  
Upham’s Corner



**NOVEMBER 19**  
**Opportunity  
Forum**  
On Building the  
Infrastructure of  
Opportunity







## Responding. Seeding. Changing.

Since 1915, the Boston Foundation has served as the primary philanthropy for Greater Boston—from its earliest days of responding to the human needs of immigrants and the poor, to seeding innovation through “there at the beginning” grants for new nonprofits and fresh ideas, to helping change the very systems that affect the lives of everyone in our region.

For its first four decades, the Foundation responded to the dramatic events of the times, including two World Wars, the Spanish flu, the Great Depression and the polio epidemic. In 1960, it began funding new ideas and nonprofits in the context of the large social justice movements of the day, then went on to help Boston cope with the wrenching desegregation of its public schools in the 1970s.

In the 1980s and 1990s, the Foundation launched its own anti-poverty initiatives and changed the very structure of the organization to put it on firm footing for the future. And in 2001, it added civic leadership and policy work to its mission against the backdrop of 9/11, the Great Recession and the Boston Marathon bombings.

The following pages summarize the evolution of Greater Boston’s community foundation in the context of the historical events that have shaped and inspired its work over the last 100 years. For the full story, go to [tbf100.org](http://tbf100.org) and read the Centennial book *The Boston Foundation in the City of Ideas: 1915-2015*.

“The Bird Feeder,” Boston Common, 1915,  
the year the Foundation was founded

## Responding to Need

**In 1915, on the brink of America's involvement** in World War I, Greater Boston's community foundation was founded by a father and son—Charles E. and Charles M. Rogerson. The son became the first director and would continue in that role for the next 30 years. In 1917, an industrialist named James Longley left \$4 million to the Foundation, giving it the resources to be the first community foundation in the country to make grants.

For the next four decades, the Foundation shaped the future of philanthropy in Boston, responding to the needs of immigrants and laborers living in overcrowded tenements and struggling to build decent lives. Grants went to settlement houses, hospitals and organizations representing the rights of women and people of color. Funding also helped to ease hardship during two World Wars, the Great Depression and the polio epidemic of the 1950s.

The Foundation funded all of the hospitals and settlement houses that served the needs of thousands of immigrants pouring into Boston from Southern and Eastern Europe.

1915





During the Great Depression virtually all funding went to direct relief, as close to one-third of Bostonians lost their jobs and families struggled to survive.

World War II brought jobs to Bostonians, including women, and led to the Foundation's first support of child care for the children of working women.



In the 1950s, the Foundation responded to the devastating polio epidemic and funded youth programs to counter the problem of juvenile delinquency.





## Seeding Innovation

**In 1959, a major bequest of close to \$20 million** from a mysterious financier named Albert Stone gave the Boston Foundation the resources it needed to hire its first full-time director, Bill Bender, who began making visionary seed grants to a host of new nonprofits and great ideas.

The Foundation went on to have a profound impact on affordable housing, community health, public education and the arts in Boston. Eventually, it would be “there at the beginning” for more than 100 great ideas and new nonprofits—from WGBH to Brigham and Women’s Hospital to the cleanup of Boston Harbor.

In 1985, Anna Faith Jones became the first African-American woman to lead a major community foundation. During her tenure, the Foundation focused on inner-city poverty, strengthened relationships with donors and transformed the structure of the organization so that it could invest its own funds and have a diverse and active board.

In the early 1960s, the Foundation funded Operation Exodus, which bused African-American children from Roxbury and Dorchester to better schools in other neighborhoods.

Boston Foundation  
director Geno  
Ballotti played a  
seminal role in the  
cleanup of Boston  
Harbor by funding  
Conservation Law  
Foundation and  
Save the Harbor/  
Save the Bay.



In the 1980s, the  
Foundation involved  
the business  
community in the  
Boston Public  
Schools through  
support for the  
Boston Compact  
and the Boston Plan  
for Excellence.





Poverty, especially among African Americans and Latinos, was a major focus of the Foundation's research and funding.

Community organizing, especially among immigrants and refugees, was supported by the Foundation in the 1990s.



# Changing the Game

In 2001, in the midst of a “Boston Renaissance,” Paul S. Grogan was appointed President and CEO with a mandate to transform the Boston Foundation into a major civic leader. Within one year, the Foundation began conducting and publishing research on important issues, holding public forums attended by hundreds of people, convening diverse task forces and coalitions—and engaging in deep policy work. The Boston Indicators Project grounded the civic leadership work in data and published provocative and informative biennial reports, while creating an award-winning website.

Significant accomplishments have included historic K-12 education reform legislation, municipal health care reform, millions of dollars for the state’s cultural facilities, community college reform, a coalition promoting health and wellness—and the leveraging of major federal funds for a unique college completion initiative called Success Boston. Through its grant making, the Foundation continued to respond to the needs of the people of Boston and seed innovation.

By 2001, Boston was leading the revival of old Northern cities, with the Big Dig, a thriving Seaport District and a big-city skyline.







Groundbreaking education reform legislation was signed by Governor Deval Patrick in 2010, raising the cap on charter schools and bringing \$250 million in Race to the Top funding to Massachusetts.

The Foundation became a center for leading-edge research, a major convener and a force for enlightened public policy in housing, education, cultural facilities and municipal health.



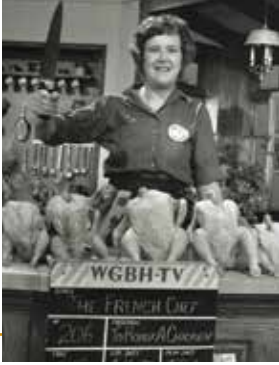


Higher education also benefited from the Foundation's leadership, with community college reform and Success Boston, a major initiative to help Boston's students complete college.

2015



More than half of Boston's residents are people of color and the focus is on educating children and adults for a world dominated by technological innovation and communication.



### WGBH-TV

Julia Child's series  
*The French Chef* first  
aired in 1963.

## There at the Beginning Fueled by the Permanent Fund for Boston

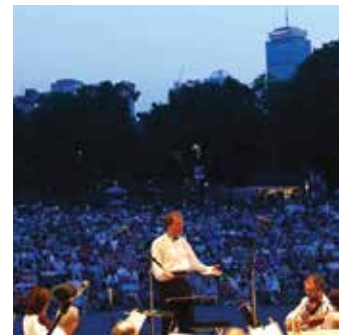
The **Permanent Fund** for Boston, the Boston Foundation's endowment, has been the sole resource for the numerous times the Boston Foundation has been "there at the beginning," providing seed capital and early grants to more than 100 new nonprofits, ideas and innovations in all areas of community life. In some cases, the Foundation helped to launch these endeavors and provided key leadership. Beyond offering crucial financial resources, the Foundation's support telegraphed optimism about the future of our city.

Achievement Network  
Action for Boston Community Development  
American Repertory Theater  
Arts & Business Council of Greater Boston  
ArtsBoston  
The BASE  
BATEC  
BELL  
Bessie Tarrt Wilson Initiative for Children  
Bornstein & Pearl Food Production Center  
Boston After School & Beyond  
Boston AIDS Consortium  
Boston Center for the Arts  
Boston Children's Chorus  
Boston Community Capital  
Boston Compact  
Boston GreenSpace Alliance  
Boston Harbor Cleanup  
Boston Indicators Project  
Boston Landmarks Orchestra  
Boston Nature Center  
Boston Opportunity Agenda  
Boston Schoolyard Initiative  
Boston STRIVE  
Boston TenPoint Coalition  
Boston Urban Asthma Coalition  
Boys & Girls Clubs of Boston  
BPE (Boston Plan for Excellence)  
Breakthrough Greater Boston  
Bridge Over Troubled Waters  
Brigham and Women's Hospital  
Calderwood Pavilion at the BCA  
Carol R. Goldberg Civic Engagement Initiative  
Center for Teen Empowerment

Charles River Conservancy  
Citizen Schools  
Citizens' Housing and Planning Association  
City Year  
Coalition FOR Community Colleges  
Commonwealth Compact  
Commonwealth Housing Task Force  
CommonWealth Kitchen  
Commonwealth Seminar  
Commonwealth Shakespeare Company  
Commonwealth Summit  
Community Builders  
Community Health Centers  
Community Music Center of Boston  
EdVestors  
English for New Bostonians  
Fairmount/Indigo Line CDC Collaborative  
Family Independence Initiative  
Faneuil Hall Marketplace  
Greater Boston Food Bank  
Greater Boston Interfaith Organization  
GreenLight Fund  
Health Care for All  
Health Leads  
Healthy People/Healthy Economy Initiative  
Home Funders  
Hyde Square Task Force  
Initiative for a Competitive Inner City  
Inquilinos Boricuas en Acción (IBA)  
Institute for Nonprofit Management and Leadership  
John LaWare Leadership Forum  
LISC Boston  
Mass in Motion  
Massachusetts Advocates for Children



Massachusetts Affordable Housing Alliance  
 Massachusetts Association of Community  
 Development Corporations  
 Massachusetts Charter Public School Association  
 Massachusetts Cultural Facilities Fund  
 Massachusetts Housing and Shelter Alliance  
 Massachusetts Immigrant & Refugee Advocacy  
 Coalition (MIRA)  
 Massachusetts League of Community Health Centers  
 Massachusetts Life Sciences Collaborative  
 Massachusetts Nonprofit Network  
 MASSCreative  
 Metropolitan Boston Housing Partnership  
 More Than Words, Boston  
 Mothers for Justice and Equality  
 Neighborhood Development Support Collaborative  
 Neighborhood Stabilization Loan Fund  
 New England Aquarium  
 New England Center for Arts & Technology  
 Partners for Youth with Disabilities  
 The Partnership  
 Pilot Schools  
 Playworks Massachusetts  
 Race to the Top Coalition  
 Reach Out and Read  
 Roxbury Multi-Service Center  
 Samaritans  
 Save the Harbor/Save the Bay  
 SkillWorks  
 Smarter in the City  
 Social Finance  
 South Cove Manor  
 Strategies for Children  
 StreetSafe Boston  
 Success Boston  
 Teach Plus  
 Tufts Medical Center  
 uAspire  
 United South End Settlements  
 UP Education Network  
 Urban Edge  
 Urbano Project  
 Victory Programs  
 WGBH-TV  
 WriteBoston  
 Year Up  
 Young Audiences of Massachusetts  
 YouthBuild Boston  
 ZUMIX





### **Sandra Edgerley**

thanked donors to the Campaign for Boston at the Boston Foundation's 100th Anniversary Gala Dinner, including *Centennial Circle* and *Centennial Society* members. She and her husband, Paul Edgerley, made one of the first outright gifts of \$1 million to the campaign and were among the first members of the *Centennial Circle*.

# The Campaign for Boston

## Donors Helping to Shape the Future of the City They Love

**A**t the heart of everything the Boston Foundation has done over the last century—every grant it has made, every innovation it has supported, every cause it has championed—is its endowment, the Permanent Fund for Boston.

Established through bequests left by hundreds of visionary and forward-thinking Bostonians, this essential fund fuels all of the Foundation's work in Greater Boston and provides the resources that have sparked positive change and enabled new ideas over the last 100 years.

The ongoing Campaign for Boston was inspired by the Foundation's 100th Anniversary and is designed to strengthen this crucial fund for today and for the future. During the Foundation's Centennial year, 2015, the Foundation raised \$192 million, almost twice the original goal of \$100 million

### **About the Permanent Fund for Boston**

The Permanent Fund for Boston provides an ongoing source of funding for organizations focused on the most pressing contemporary needs of the city and the region. Today, it represents about one-third of the Foundation's \$1 billion in assets.

Funds raised in 2015 include \$15 million in outright leadership gifts of \$1 million or more from *Centennial Circle* donors. In addition, *Centennial Society* donors confirmed legacy commitments of \$1 million or more to the Permanent Fund for Boston. Many of the remaining donations consist of planned gifts, mainly in the form of bequests, to be realized over time.

**A full list of *Centennial Circle* and *Centennial Society* members is on page 27.**

The Boston Children's Chorus, for which the Boston Foundation was "there at the beginning," sang at the Gala.



# Boston Foundation **Legacy Societies, Funds and Donors**



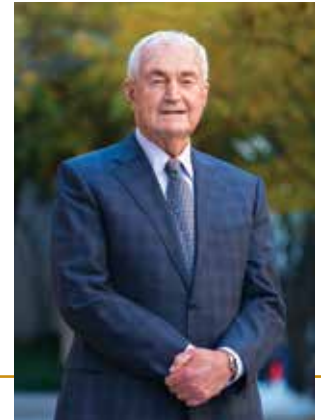
Over the last 100 years, more than 1,000 individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing and contributing to funds at the Boston Foundation—and thousands more have made contributions to funds held by the Foundation. Today, the Boston Foundation works closely with our donors, helping them to achieve high impact philanthropy and take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list the members of our Legacy Societies and all of the funds that are held by the Foundation. Each fund has its own name, 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.

# Centennial Circle

**W**e are deeply grateful to the following donors who made outright gifts of \$1 million or more to the Permanent Fund for Boston as part of our *Campaign for Boston*. These generous philanthropists are providing immediate resources to strengthen the Permanent Fund for Boston and community grant making. We thank them for their generosity and honor them here.

Anonymous (2)  
Charles Ansbacher Foundation  
Joseph E. Corcoran  
Gururaj and Jaishree Deshpande  
Sandra and Paul Edgerley  
Lawrence and Atsuko Fish  
The Flow Fund

Patricia and Paul Gannon  
Barbara and Amos Hostetter  
Jacobson Family Foundation  
Robert K. Kraft and Family  
Robert A. and Veronica S. Petersen  
Stephanie and Brian Spector



Above from top: **Jaishree and Desh Deshpande** and **Joseph E. Corcoran** are members of the *Centennial Circle*.

# Legacy Societies

**M**embers of the Boston Foundation's Legacy Societies are deeply committed to providing the Boston Foundation with the resources it will need today and in the future to meet the ever-changing needs and opportunities of our community.

## Centennial Society

As part of the *Campaign for Boston*, the following donors have confirmed legacy commitments of \$1 million or more to strengthen the Permanent Fund for Boston and benefit community grant making. We are deeply grateful to them for their generosity and for their commitment to our community. We thank and honor them here.

Anonymous (4)  
Diane DeSerras Arenella  
James F. Becker and Randal D. Rucker  
Rick and Nonnie Burnes  
Belden, Pamela, and Andrew Daniels  
Richard and Marcia DeWolfe  
Michael and Barbara Eisenson  
David J. Elliott and Hungwah Yu  
Grace and Edward Fey  
Lawrence and Atsuko Fish

Peni Garber  
Brian Hyde  
Jane Wegscheider Hyman, PhD  
Louis and Marcia Kamentsky  
Bill Nigreen and Kathleen McDermott  
Robert A. and Veronica S. Petersen  
Sam Plimpton and Wendy Shattuck  
Joseph G. Prone Foundation  
Lindsey A. Rosen  
Sandra M. Stark



### **James Longley,**

born in Boston's West End in 1840, became a director of major financial institutions in Boston and Chicago and owner of some of the largest textile mills in New England. Known for his deep devotion to Boston, when he died in 1916, he left the first major bequest to the Permanent Fund for Boston at the Boston Foundation. At \$4 million, his gift was so large that it made Greater Boston's community foundation the first in the country with the capacity to make grants.



### **Charles M. Rogerson**

was just a twenty-eight year-old attorney when he and his father, Charles E. Rogerson, founded the Boston Foundation. He drew up the legal papers that were signed on September 7, 1915, and served as the Foundation's part-time director for close to thirty years—through two World Wars and the Great Depression. Since the community foundation movement was in its infancy at the time, Rogerson created all of the systems for the Foundation's grant making, with no precedents to guide his work.

## **Longley Legacy Society**

The Boston Foundation thanks these generous donors who have confirmed legacy commitments up to \$1 million to our endowment, the Permanent Fund for Boston.

- Anonymous (9)
- Howard and Carol Anderson
- Dorothy and David, Jr.\* Arnold
- Hanna and James Bartlett
- Barry Bluestone and Mary Ellen Colten
- Janine Bouchard
- Margaret A. Bush
- Barry B. Corden
- Constance and Lewis Counts
- Ralph J. Donofrio
- Catherine Axon and Thomas M. Elder
- Ellen Epstein and Rose and Lee Epstein
- Patricia and Paul Gannon
- Paul S. Grogan
- Kate R. Guedj
- Dean T. Hara and Congressman Gerry E. Studds\*
- Ann S. Higgins
- Helen M. Jones
- Jonathan and Judy Keyes
- Anne F. Kilguss
- Vera Kilstein
- Carol F. Levin
- Bernadette M. MacPherson
- Barbara and Myron\* Markell
- Rabbi Bernard H. Mehlman
- Timothy and Deborah Moore
- Herbert E. Morse and EllenJoy Fields
- Katharine S. Nash
- Beatrice and Peter Nessen
- Ruben D. Orduña
- Jennifer Jossie Owens
- Nathaniel Pulsifer
- Gary and Natalie Robinson
- Anthony Mitchell Sammarco
- Wendy C. Sanford
- Daniel and Jennifer Sherman
- Charles and Deana Shirley
- Binkley and Paula Shorts
- Scott E. Squillace, Esq.
- Charles A. Walsh, III
- Ann and Hans Ziegler

*\*Deceased*

## Rogerson Legacy Society

We thank these donors who have a documented bequest, estate or planned gift with the Boston Foundation benefitting a fund other than the Permanent Fund for Boston.

Anonymous (19)	Marilyn L. Harris	Eleanor L. Ross
Mary Lee T. and Peter C. Aldrich	Barbara Hauter Woodward	Edith M. Routier
G. Thomas and Allison Aley	Petie Hilsinger	John A. Russell
Geoffrey D. Austrian	Kenneth D. and Cynthia L. Holberger	Beverly H. Ryburn
Theodore S. Bacon, Jr.	Chuck Holland	Wendy C. Sanford
Sherwood E. Bain	Helen R. Homans	Margaret Schmidt and Kenneth Danila
Mary Barber	Emily C. Hood	Norman J. and Maryellen Sullivan Shachoy
Rich Becker	Marjorie Howard-Jones	Annabelle W. Shepherd
Laurie A. Bencal, CPA	Muriel Hurovitz	Binkley and Paula Shorts
Doreen B. Biebusch	Stephen G. and Rosemarie Torres Johnson	Ellen L. Simons
Thomas W. Bird	Karen A. Joyce and John Fitzgerald	Edward G. (Ted) and Nancy L. Smethurst
David Blot	Ruth G. Kahn	Cheryl H. Smith
Kenneth S. Brock	Louis and Marcia Kamensky	Scott E. Squillace, Esq.
Jacob F. and Barbara C. Brown	Gary P. Kearney, M.D. and Susan Kearney	David F. and Patricia R. Squire
Rick and Nonnie Burnes	James A. Kilmurray and Janice L. Quiram	Arthur L. Stevenson
Margaret A. Bush	Barbara N. Kravitz	Anne B. Stone
Frank and Ruth Butler	Virginia Kropas	Elihu and Bonnie Stone
David and Gay Campbell	Peter and Stephanie Kurzina	Anne Thompson
Robert B. Canterbury	Frances J. Lee-Vandell	Libby and Sidney Topol
Helen T.W. Chen and Keith R. Ohmart	John H. Livens	Alan and Pamela Trefler
Edward A. and Penny Cherubino	Donald J. and Susan Kelley MacDonald	David F. Tuttle, Jr.
Arthur D. Clarke and Susan P. Sloan	Robert and Poppy Mastrovita	Joy E. Van Buskirk
Margaret J. Clowes	Stephen J. McCarthy	Peter S. and Pamela L. Voss
Frances F. Connelly	Edward J. and Jane S. Michon	Robert R. Wadsworth and Catherine E. Moritz
Diane Currie	Charles Fessenden Morse	J. H. Walton, Jr. and Carolyn Walton
Marilyn Darling	Frederick W. Neinas, MD	Gordon Weil, Jr.*
David S. and Shirley G. Dayton	Carl H. Novotny and Rev. Judith Swahnberg	Charles and Patricia Westwater
Ralph J. Donofrio	Mark A. and Judith A. Osborne	Constance V. R. White
Malcolm Dunkley	Douglas D. and Geraldine Payne	Eric S. and Linda H. White
Anita Maria Elliott	Nancy E. Peace	Jeffrey and Theresa Whitehead
Amy Zell Ellsworth	Robert A. and Veronica S. Petersen	Inge J. Wetzstein
Ellen Epstein and Rose and Lee Epstein	Agatha W. Poor	Michael N. and Mary M. Wood
June M. Ficker	Glendora M. Putnam	Eleanor D. Young
Sandra and Philip* Gordon	Warren Radtke and Judith Lockhart Radtke	
Andrew C. Goresh	Chris Remmes	
Dr. G. Anne Guenzel	Richard L. Robbins	
Charlotte I. Hall		
Mrs. Chester Hamilton		
Dean T. Hara and Congressman Gerry E. Studds*		

*\*Deceased*



### **Edward Glines,**

who was born in 1849 in Somerville, held numerous positions in government—eventually serving as the Mayor of Somerville, from 1901 to 1904, and was a successful businessman, running the Glines Company, which provided supplies to Boston hotels. He was a major contributor to charities and widely admired. “Few if any men in business in Boston stand higher in the estimation of their associates,” said one newspaper article. When Mr. Glines died in 1938, he left a generous, unrestricted named fund to the Permanent Fund for Boston.

## Funds and Donors

### The Permanent Fund for Boston

**T**he Permanent Fund for Boston is the Boston Foundation’s endowment and the most flexible fund we have, giving our staff and board members the crucial resources they need to respond to the most pressing issues facing contemporary Greater Boston. Many donors have contributed to this fund since the Foundation was first established more than 100 years ago. In honor of our Centennial in 2015, the Boston Foundation launched the *Campaign for Boston* to strengthen this important fund, which supports grants in education, health & wellness, jobs & economic development, neighborhoods & housing and arts & culture—all areas that have a profound impact on the quality of life in Greater Boston.

### Unrestricted Named Funds

The following funds allow the Boston Foundation’s staff and board total flexibility in determining where they will have the greatest impact on the community. The year each fund was established is in the parentheses.

- Emily Tuckerman Allen Fund (2004)
- Geno A. Ballotti Fund (1984)
- Irene W. Bancroft Fund (1997)
- James R. Bancroft Trust Fund (1984)
- Harriett M. Bartlett Fund (1987)
- J. E. Adrien Blais Fund I (1967)
- Franklin S. & Cynthia B. Browning Fund (1988)
- Frank B. & Watson G. Cutter Fund (1984)
- James Dean Fund (1946)
- Katherine E. Dooley Fund (1997)
- Herbert and Lucy Fields Fund (2008)
- Edward Glines Fund (1938)
- Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2009)
- Nathaniel Hooper Fund (1938)
- Grace A. Jacobs Fund (1988)
- Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2006)
- Polaroid Fund (1997)
- Ruth M. Reiss Memorial Fund (1997)
- Samuel H. & Lizzie M. Robie Trust Fund (1982)
- Walter J. & Marjorie B. Salmon Fund (1999)
- Robert Wadsworth Fund for the Future of Boston (2008)



## Field of Interest Funds

These funds are directed to a particular issue or area of concern. Many were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them. The year each fund was established is in parentheses. New funds are bolded and italicized.

Solomon Agoos Fund (1987)  
Anonymous Fund (1987)  
Arts Fund (1997)  
    Edith Allanbrook Fund (2002)  
    Boston Parks Access Fund (2002)  
    Free for All Fund (2014)  
    Edward Hyde Cox Fund (2000)  
    Anna Faith Jones Arts Fund (2000)  
    MassDevelopment Arts Fund for Community and Economic Development (2003)  
    Stephen and Sybil Stone Arts Fund (2003)  
    Brother Thomas Fund (2007)  
    Brooks White, Jr. Memorial Fund (2001)  
Edith M. Ashley Fund (1960)  
Diane Heath Beever Memorial Fund (2008)  
J. E. Adrien Blais Fund II (1967)  
J. E. Adrien Blais Fund III (1967)  
Emily Budd Fund (1960)  
Camping Associates of Roslindale & Milton Fund (1981)  
Community Organizing & Advocacy Endowment Fund (1988)  
Community Safety Fund (2002)  
Coolidge Christian Education Fund (1993)  
Curtis International Council Fund (2000)  
David W. Cushing Fund (1987)  
Mabel Walsh Danforth Fund (1949)  
Virginia Herrick Deknatel Fund for Children's Services (2001)  
Major Arthur M. Diggles Foundation Fund (1993)  
Annie S. Dillaway Fund (1965)  
Kate Ellis Fund (1953)  
Equality Fund (2011)  
Mary C. Farr Arts Fund (2005)  
***The Flow Fund*** (2015)  
Frederika Home Fund (1979)  
Fund for Self-Reliance (1989)  
General Support Fund for Education (1988)  
Elizabeth D. Goldsmith Fund for Families (2010)  
The Haiti Fund (2010)  
Charles W. Hapgood Trust Fund (1986)  
Harcourt Family Fund (2001)  
Mary Harris Fund (1940)  
Grace L. Holland Fund (2007)  
Theodore C. Hollander Trust Fund (1929)



### **Fanny Wharton**

was the daughter of Salem merchant William Pickman, who created the Fanny Wharton Helping Fund in her memory when she died in 1880. The Fund was for the “relief of sick young women and children” and administered by family members for many years. In 1919, it was given to the Boston Foundation by Fanny’s husband, William F. Wharton, a Boston lawyer and Assistant Secretary of State under Benjamin Harrison. The purpose of the fund remains focused on the health of women and children.

Jacoby Club of Boston Fund (1984)  
 Jamaica Plain Dispensary Fund (1962)  
 Charles Frederick Joy and Dora Marie Joy Fund (1992)  
***Kraft Family Non-Profit Emergency Fund*** (2015)  
 Edith Shedd Larsen Fund (1962)  
 Latino Legacy Fund (2012)  
 Maude A. MacNaught Fund (1979)  
 Azad & Doris Maranjian Charitable Trust Fund (2009)  
 Massachusetts Civic League Fund (1983)  
 Willis Munro Fund (1989)  
 Harry L. Nason Fund (1953)  
 Florence Arnaud Newton Fund (1955)  
 Grace G. North Fund (1954)  
 Augustus Page and Grace Fagan Browne Memorial  
 Endowment Fund (2006)  
 Norman Everett Pearl Fund (1996)  
 Janet S. & George T.B. Perkins Fund (2000)  
***Petersen Family Fund for the Environment*** (2015)  
 Louise Phillips Bequest Fund (2003)  
 David R. Pokross Fund for Children in Need (1996)  
 Alice F. Rosenquist Fund (1984)

Louis Agassiz Shaw Fund (1991)  
 Katherine Dexter Shelman Fund (1954)  
 Arthur L. Sherin and Frances C. Sherin Fund (2003)  
 Sophia Snow Fund (1948)  
 Helen & Marion Storr Fund (1986)  
 Stuart-Jones Trust Fund of the All Souls Lend A Hand Club,  
 Inc. (1994)  
 Carroll J. Swan Memorial Fund for Children's Charities (1935)  
***The US-Nepal Fund at the Boston Foundation*** (2015)  
 Nelson E. Weeks Fund (1937)  
 Fanny Wharton Fund (1919)  
 Katherine C. Wheeler Fund (1987)  
 Fund for Preservation of Wildlife & Natural Areas (1994)  
 Herbert Farnsworth Fund (1994)  
 Hollis D. Leverett Memorial Fund (1994)  
 Ruth and Henry Walter Fund (2010)  
 Arthur L. Williston and Irene S. Williston Trust For Education  
 (1953)  
 Mary Denny Williston Fund (1969)  
 Window Shop Fund (1988)  
 Gladys W. Yetton Fund (1969)

## Gifts to the Permanent Fund for Boston

The following lists include donors who have made gifts totalling more than \$5,000 to this fund, with the year of their first contribution noted in parentheses. Donors with new gifts are bolded and italicized.

### Gifts from Individuals, Corporations and Foundations

***Anonymous*** (2004, **2010**, 2013, **2015**)  
***Joel Alvord and Lisa Schmid-Alvord*** (2014)  
 Mr. and Mrs. Peter Brooke (1994)  
 The Boston Company (1991)  
 Brother Thomas Charitable Foundation (2007)  
 Peggy A. Brown (2008)  
 Henry Burkhardt, III (1986)  
***Catherine and Paul Bittenwieser Foundation*** (1998)  
 William Putnam Cabot (1970)  
 Linda Cabot Black Foundation (2005)  
 Dorothy Jordan Chadwick Fund (2002)  
 Chester County Community Foundation, Inc. (2007)  
 Combined Jewish Philanthropies of Greater Boston, Inc. (2007)  
 Commonwealth of Massachusetts (2009)  
 Michael F. Cronin (2004)  
***Theodore H. Cutler*** (2015)  
 Lawrence and Susan Daniels Family Foundation (2003)  
 Wm. Arthur Dupee Memorial Fund (1984)  
 Dusky Foundation (2013)

Eastern Bank Charitable Fund (2014)  
 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)  
***Lucille Francis*** (2014)  
 MFS Investment Management (2014)  
 John Lowell Gardner Fund (1987)  
***Gonzalez Saggio & Harlan LLP*** (2014)  
 Grand Bostonians Dinner (1984)  
 Anne C. Gray (2010)  
 John Hancock Life Insurance Company (2014)  
 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)  
***Greg and Maria Jobin-Leeds*** (2014)

Stephen P. Jonas (2007)  
*Ross Jones and Emily Nielsen Jones* (2015)  
 John S. and James L. Knight Foundation (2009)  
 Dr. & Mrs. Arthur R. Kravitz (1987)  
*George and Ellen Lovejoy* (2015)  
 Mr. and Mrs. Gael Mahony (1982)  
*Reinier Moquete* (2013)  
 Wilbert G. and Eunice Muttart Foundation (2007)  
 Northern Trust (2005)  
 The Overbrook Foundation (1991)  
*Partners HealthCare System, Inc.* (2013)  
 Francis Ward Paine Foundation, Inc. (1982)  
*Phillip Perelmuter* (2013)  
 Philanthropic Collaborative, Inc. (2005)  
*David R. Pokross, Jr.* (1996)  
*William J. and Lia G. Poorvu* (1996)  
 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)  
 Starr Foundation (2005)  
 Matthew J. & Gilda F. Strazzula Foundation (2000)  
 Gertrude T. Taft (1956)  
 Tech/Ops, Inc. (1982)  
 United Asset Management Corporation (1994)  
*Herb and Charlotte Wagner* (2014)  
*H. Reed Witherby and Ivers Bever* (1994)  
 Ms. Hungwah Yu and Mr. David J. Elliott (2002)  
 Albert and Judith Zabin (2008)

### Gifts from Estates

Alice A. Abbott (1967)  
 Emily T. Allen (2006)  
 Matilda S. Alley (1964)  
 Miriam S. Alley (1965)  
 Margaret Sears Atwood (1970)  
 Margaret E. Babcock (1973)  
 Annie O. Baldwin (1953)  
 Wilbert S. Bartlett (1969)  
 George P. Beech (2009)  
 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. Claflin (1992)  
 William H. Claflin (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)  
 Mary Farr (2006)  
 Lucy Fields (2008)  
 Benjamin Fisher (1996)  
 Edith R. Fottler (1948)  
 Alma L. Frost (1948)  
 Anna C. Frothingham (1941)  
 Forrest C. Gates (1970)  
 Mary M. Geist (1982)  
 Pauline S. Germeshausen (2006)  
 Anne C. Gray (2010)  
 Donald Gregg (1963)  
 Patricia Grisham (1964)  
 Joseph Guild (1964)  
 John Hagopian (2002)  
 Ellen Page Hall (1931)  
 Dorothy C. Harris (1967)  
 Elizabeth M. Hay (1972)  
 Fred R. Hayward (1969)  
 Elizabeth D. Herteli Trust (2005)  
 Vladimir H. Herteli Trust (2005)  
 Anna P. Hills (1969)  
 Harry Holland (2007)  
 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)



**George H. Eastman** was born in 1881 in Boston and graduated from English High School and Harvard College. He was a successful insurance broker who made a fortune through wise investments. When he died in 1970 at the age of 89, he left a major bequest to the Permanent Fund for Boston, writing, "After I'm gone, I must rely on the good judgment of others for any good I might be able to do."

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)  
 Jordan S. Ruboy, M.D. (2011)  
 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)  
 Albert and Judith Zabin (2007)

### **Gifts from Trusts**

Margaret Shaw Allen Trust (1982)  
 James R. Bancroft Trust (1983)  
 Helen C. Barker Trust (1990)  
 Nancy Beals Trust U/W (1984)  
 Diane Beever Charitable Remainder Unitrust (2008)  
 Reginald Benting Charitable Remainder Unitrust (2009)  
 Richard A. Berenson Family Trust 1972 (2000)  
 Nelson Bigelow Trust (1990)  
 Mabel M. Brown Trust (1991)  
 A. Page Browne Jr. Trust (2006)  
 The Cynthia B. Browning 1992 Trust (2006)  
 Franklin S. Browning, Jr. 1992 Trust (2008)  
 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)  
 Elizabeth D. Goldsmith 2005 Charitable Remainder Trust  
 (2010)  
 Donald Gregg Subtrust (2008)  
 Charles Hapgood Trust (2009)  
 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)  
 Frances C. Huvos 1983 Trust (2011)  
 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)  
 Lambert Marital Trust (2006)  
 Barbara Estabrook Livermore Trust (1982)  
 Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund)  
 (1973)  
 Mason Charitable Remainder Annuity Trust (2005)  
 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)  
 Arthur L. Sherin Trust (2008)  
 J. de Vere Simmons Trust (1985)  
 Edson B. Smith Trust U/A (1984)  
 Irene C. Smith Trust U/A (1975)  
 Florence Snelling Trust (2006)  
***The William D. Sohler Marital QTIP Trust*** (2014)  
 Spaulding-Potter Charitable Trusts (1972)  
 Esther G. Stoddard Trust Under Will (2006)  
 Margaret Castle Tozzer Trust U/Ind (1978)

## Donors to the Civic Leadership Fund

**T**his critical fund helps to fuel the Boston Foundation's highly effective formula for civic leadership, which includes: publishing cutting edge research; holding major forums and convenings; conducting strategic and proactive grant making; forming task forces and coalitions; using communications and the media—and advancing public policy. A number of areas of life in Greater Boston and throughout the Commonwealth have benefited tremendously from this work, including public education, college completion, community colleges, health and wellness, cultural facilities, smart growth housing, municipal finance and criminal justice. We thank all of this year's generous donors.

### GIFT AMOUNT

#### \$100,000+

Anonymous  
Jack and Elizabeth Meyer

#### \$50,000-\$99,999

Paul and Sandra Edgerley  
Amalie Kass  
Alan and Harriet Lewis

#### \$25,000-\$49,999

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## The Boston Foundation's Civic Leadership Impact

### BY THE NUMBERS

Over the last 15 years, with the support of hundreds of donors to the Civic Leadership Fund, the Boston Foundation's civic leadership has had real impact.

**Government Dollars Leveraged and Saved Through Civic Leadership and Public Policy Work**

**\$599.4 MILLION**

**Number of Research Reports Published Since 2001, including 89 Understanding Boston Reports**

**115**

**Number of Public Forums including Understanding Boston Forums Since 2001**

**160**

**Number of People Who Attended Forums including Understanding Boston Forums Since 2001**

**32,400**

Wendy Shattuck and Sam Plimpton  
Binkley and Paula Shorts  
Richard and Susan Smith  
Family Foundation  
Brian and Stephanie Spector  
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Christine Kondoleon

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Foundation  
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Appy and Susan Chandler  
Gerald and Kate Chertavian  
Ciccolo Family Foundation  
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Susana and Ferdinand Colloredo-  
Mansfeld  
Constance and Lewis Counts  
Stephen Crosby and Helen Strieder  
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John and Diddy Cullinane  
Susan Culman  
Curriculum Associates  
J.H. Daingerfield and Constance Perry  
Catherine D'Amato and Debbie Ford  
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Stephanie Dodson  
Ronald Druker  
William Edgerly  
Lee Ellsworth and Amy Zell Ellsworth  
Thomas Feeley  
Tim and Corinne Ferguson  
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Alan and Judy Fulkerson  
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Barbara Fish Lee  
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WinnDevelopment  
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**UP TO \$25-\$999**

Anonymous (4)  
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Samuel Adams  
Scott Bartley and Christopher Norris  
William Baskett  
Anthony and Jacqueline Baudanza  
Kevin Bolduc  
John and Jane Bradley  
Meg Campbell  
Cynthia Chace Macniel  
Stephen Chan  
Ann Crane  
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Geri Denterlein  
Carmen Denyes  
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Lawrence S. DiCara  
Robert Donnelly  
Michael Douvadjian and  
Lynne Brainerd  
Donna Driscoll  
Shane Dunn  
David and Marion Ellis  
Ellen Epstein and Ian Brownell  
Daniel Fleishman and Barbara Shapiro  
Laurence Flood and Mary Tyler  
Knowles  
Tom and Carla Fortmann  
Fraser Project Management  
Robert and Rochelle Friedman  
Susan Friedman  
Brendan Furey and Tara Henry  
Timothy and Mary Anne Gassert  
Laura Godine  
Hillel Greenbaum  
Gregory Groover, Sr.  
Rev. Ray Hammond and Dr. Gloria  
White-Hammond  
George and Daphne Hatsopoulos  
Petie Hilsinger  
Kenneth and Pamela Hurd  
Charles and Charlene Hyle  
Jamaica Plain Regan Youth League  
Jeffrey and Susan Jones

Lawrence Jordan and  
Myechia Minter-Jordan  
Martin and Wendy Kaplan  
Jonathan and Judith Keyes  
Garrett Larivee  
Leading By Example  
Mary Kay Leonard and  
Richard W. Valachovic  
Martin Liebowitz and Mary M. Lassen  
Elliott and Carole Mahler  
Elizabeth March and David Stein  
Mary Jo Meisner  
Scot and Lorraine Miller  
Neighborhood of Affordable  
Housing, Inc.  
Bill Nigreen and Kathleen McDermott  
Arthur and Judith Obermayer  
Carol and Thomas O'Donnell  
Pauline O'Leary and John Malarkey  
Colette Phillips  
Jeffrey Poulos  
Hanson Reynolds and Sharon Gray  
William G. Rogerson  
Elizabeth Saltonstall  
Helen Chin Schlichte  
Daniel and Jennifer Sherman  
Ellen Simons  
Guido and Julie Smith-Bartoloni  
Gail Snowden  
William and Christine Speciale  
United Parish in Brookline  
Alfred and Marta Van Ranst  
Stephanie and Alan Ward  
Robert and Joan Weinstein  
Christopher and Nancy Winship  
Katherine Winter  
Michael Yogman  
Albert and Judith Zabin



## Donor Advised Funds

The following is a list of all Donor Advised Funds established by individuals, families and businesses choosing to be actively involved in their charitable giving. We work closely with these donors to help them achieve high-impact giving. We thank them for choosing the Boston Foundation and for their commitment to philanthropy. The year the fund was established is listed in parentheses. New Donor Advised Funds are bolded and italicized.

### The Black Philanthropy Fund

was established as a Donor Advised Fund at the Boston Foundation in 2008 to further enhance a strong tradition of African-American philanthropy in Boston, with a focus on increasing the magnitude and effectiveness of giving to the black community. Recently, the Fund launched a program called Boston Basics with the Mayor's Office of Education and Harvard University's Achievement Gap Initiative. Boston Basics is a research-based framework that has the goal of dramatically increasing kindergarten readiness for children 0 to 3 in Boston.

- 3C Fund (2012)  
 63 Marlborough Street Fund (1984)  
 A & E Educational Quest Fund (2004)  
 AADS Memorial Fund (2004)  
 Walter and Alice Abrams Family Fund (2005)  
 Abromowitz/Ruttenberg Family Fund (2000)  
 Acacia Fund (2004)  
 Adler Family Fund (2006)  
 Adlib Foundation (2010)  
 Adopt-A-Statue Program - Bill Russell Legacy Project (2013)  
 Adopt-A-Statue Endowment Fund (1988)  
 Affinity Services Corporation Fund (2003)  
*Aher-McCoy Charitable Fund* (2014)  
 James F. Alenson Memorial Fund (2007)  
 Aley Fund (2009)  
 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)  
 George and Nedda Anders Fund (1991)  
 Barbara Jane Anderson Fund (2000)  
 Selma and Bayness Andrews Fund (2006)  
 Michael & Ellen Angino Fund (1997)  
 Anony Fund (1998)  
 Ansara Family Fund (2006)  
*Anthes Weitz Family Fund* (2015)  
 Anthropologists' Fund for Urgent Anthropological Research (1996)  
 APOC Fund (2011)  
 Arba Lifnot Boker Fund (1992)  
 Arch Stanton Charitable Fund (2013)  
 Armony Erel Charitable Fund (2008)  
 Atalaya Fund (2004)  
 Atlantic Fund (1997)  
 Ausschnitt Fund (2004)  
*Victoria J. Avery Charitable Fund* (2014)  
 Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)  
 Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)  
*Back Porch Fund* (2014)  
 Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)  
 Balzer/Bellinger Fund (2007)  
 John & Judith Barber Fund (2002)  
 Richard Allan Barry Fund (2002)  
*Hanna and James Bartlett Fund* (2014)  
 Baudanza Family Fund (1997)  
 Baupost Group Charitable Fund (2004)  
 Beachcomber Fund (2008)  
 Belinda Fund (2011)  
 Benjamin Foundation (2005)  
 William D. & Mary E. Benjes Fund (1984)  
 Jane Bernstein Fund (2006)  
 Best Doctors Charitable Foundation (2010)  
 Charlotte Saltonstall Bigham Memorial Fund (2004)  
 Bird Fund (1999)  
 Bill Bither Charitable Fund (2013)  
 Bitpipe Legacy Fund (2004)  
 Black Philanthropy Fund (2008)  
 NICSA/William T. Blackwell Scholarship Fund (1995)  
 Emmanuel and Jane Blitz Fund (1992)  
 Tom and Lisa Blumenthal Family Foundation (2005)  
 Joan T. Bok Fund (1997)  
 Bolze Family Fund (2013)  
 Boston City Hospital Social Service Fund (1981)



BPE/Bank of Boston 200th Anniversary Fund (1982)  
 Braverman Family Fund (1992)  
 Bride/McEnany Fund for Safer Women (2014)  
 Bronner Charitable Foundation (2006)  
 Peter A. Brooke Fund (1998)  
 Brooke Family Donor Advised Fund (2007)  
 Peter W. and Ruth H. Brooke Fund (2004)  
 Buckman Fund (2010)  
 Dean Bullock Family Fund (1997)  
 Bill and Barbara Burgess Fund (2002)  
 William T. Burgin Fund (2001)  
 John A. Butler Memorial Fund (1988)  
 Kairos Butler Fund (1994)  
 Butler's Hole East (2011)  
 Butler's Hole Fund (1994)  
 Butler's Hole North (2011)  
 Butler's Hole South (2011)  
 C & K Foundation Fund (2000)  
 Norman L. Cahners Fund (1984)  
 Campbell Foundation Fund (2003)  
 A. Bruce Campbell Fund (2002)  
 Krystle Campbell Memorial Fund (2013)  
 C. Alec and Sarah O' H. Casey Charitable Fund (1993)  
 Margaret W. Casey Fund (1986)  
 Alice F. Casey Fund (2006)  
 Ellen W. Casey Fund (1993)  
 Champa Charitable Foundation Fund (2003)  
 Charlestown Benevolent Fund (2010)  
 Charlestown Fund (2008)  
 Chasin/Gilden Family Fund (2000)  
 Charles Ezekiel and Jane Garfield Cheever Funds I & II (2006)  
 Chelsea Community Fund (1997)  
 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)  
 Civic Engagement Fund (2010)  
 CJE Foundation Fund (2007)  
 Clark Family Fund (2010)  
 Clarke Fund (1987)  
*Clementine Fund* (2014)  
 Coit Family Fund A (2001)  
 Colby Charitable Fund (1980)  
 Colony Road Fund (1997)  
 Condor Street Fund (1988)  
 Constance and Lewis Counts Fund (1990)  
 Coolidge Family Fund (1982)  
 Cooper Leaser Family Fund (1997)  
 Corvelli Fund (1996)  
 George D. & Angelyn K. Coupounas Fund (1994)  
 Demetrios G. C. & Kimberly A. Coupounas Fund (1996)  
 Jessie B. Cox CLT - Cox Family Fund (2009)  
 Jessie B. Cox Charitable Trust Fund (2008)  
 Crane Fund (2012)  
 Joseph Craven Family Fund (2014)  
 Cregan Charitable Fund (2005)  
 Crosby Family Fund (2000)  
 Kate Crozier Fund (2007)  
 Cuming Family Endowment Fund (1995)  
 Tarrant and Laura Cutler Charitable Gift Fund (2008)  
 Dainger Fund (1997)  
 Lawrence B. and Elisabeth T. Damon Charitable Fund (2013)  
*Belden, Pamela and Andrew Daniels Opportunity Fund for  
 Aspiring Boston Young People* (2014)  
 Darling Family Fund (1983)  
 John Da Silva Memorial Fund (1988)  
 Kimberly Dawson Charitable Fund (2012)  
 John H. Deknatel Family Fund (2009)  
 Sarah Derby and Gary MacDonald (2007)  
 Marshall and Laura Derby Charitable Fund (2007)  
 Rebecca Derby and Evan Morton (2007)  
 DeWolfe Family Fund (2000)  
 Dibble Family Fund (2005)  
 Larry DiCara Fund (2006)  
 Dillon Fund (2004)  
 Dintersmith-Hazard Foundation Fund (2006)  
 Dodson Family Charitable Fund (2007)  
 Doe Noordzij Fund (2001)  
 Eugene B. & Nina L. Doggett Charitable Fund (1999)  
*Eric Dolinski & Kristen Ploetz Fund* (2015)  
*Marthanne Dorminy Fund* (2015)  
 Douglas Drane Family Fund (1984)  
 Drane Center Fund (2002)  
 Dryfoos Family Fund (2012)  
 William J. Ducas Charitable Fund (2011)  
 Margaret Eagle Foundation Fund (2000)  
 Ecclesia Mission Fund (2012)  
 Edgerley Family Fund (2012)

Egozy Fund (2006)  
 Eisenson Family Fund (2005)  
 Elliott and Yu Education Fund (2012)  
 Ellis Family Fund (2003)  
 Elphaba Fund (2014)  
*Elpus Family Fund* (2015)  
 Employment Retention Fund (2004)  
 Gerald Entine Family Trust Fund (2008)  
 Ethics Trust Fund (1993)  
 Evans Family Fund (1999)  
 Norris & Constance Evans Charitable Fund (1999)  
 The Ewing Family Fund (2014)  
 Peter and Ellen Fallon Fund (1997)  
 Steven D.H. Farrell Fund (2013)  
 Carol Fazio Charitable Fund (2010)  
 First Principle Fund (2006)  
 Fish Family Fund (2009)  
 Fishreys Family Philanthropic Fund (1999)  
 Jack Florey Fund (2004)  
 Flower Hill Fund (2012)  
 Foote-Richards Family Foundation (2013)  
 Forshey Family Fund (1997)  
 Free for All Concert Fund (2011)  
 Niki & Alan Friedberg Fund (1986)  
 David Frisbie Family Charitable Fund (2010)  
 Fulkerson Family Fund (1998)  
 Davis R. Fulkerson Fund (1999)  
 Lyle W. Fulkerson Fund (1999)  
 Sarah Fulkerson and Robert Le Roy Family Fund (1999)  
 Fuller Trust, Inc. Fund (2009)  
 Future Fund (2006)  
 Gabrieli Family Fund (1997)  
 Gaffney/Kames Foundation Fund (1997)  
 Galilean Fund (2008)  
 Ganesh Fund (2001)  
 Gannon Family Charitable Fund (2003)  
 Gannon Family S.U.N. Fund (2010)  
 John Lowell Gardner Fund (1986)  
 Dave Garroway Fund (1982)  
 Garuda Fund (2007)  
 Brad Gatlin Family Fund (1995)  
 Gaudette Family Fund (2000)  
 Gergen Family Fund (2009)  
 Congressman Gerry E. Studds Fund (2006)  
 Carl J. Gilbert Fund (1984)  
 Gilbert Fund (2007)  
 Ginsberg/Kaplan Fund (2011)  
 Giudice Family Fund (2011)  
 Glassman Gale Family Fund (1985)  
 John & Ethel Goldberg Fund II (1984)  
 Carol R. & Avram J. Goldberg Fund (1983)  
 Golden Family Fund (2000)  
 Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)  
*The Goodman-Swindell Family Foundation* (2015)  
 Goodworks Fund (2002)  
 Gordon Educational Fund (2001)  
 Sandra & Philip Gordon Family Foundation Fund (2001)  
 Gordon Place Charitable Fund (2012)  
 Laurie Gould and Stephen Ansolabehere Fund (2009)  
 Gravelley Springs Fund (2005)  
 Green Fund (2011)  
 Greenhill Family Charitable Fund (2013)  
 Grogan Fund (2012)  
 Patricia H. Gross Fund (1999)  
*Elizabeth and Phillip Gross Family Foundation* (2014)  
 Grunebaum Charitable Fund (2006)  
 Gualala Fund (1991)  
 Guenzel-Pieters Family Fund (2008)  
 Charles & Dorothy Gullickson Fund for Social Change (1998)  
 Jay Habegger and Christine Nagle Fund (2004)  
 Belle Linda Halpern Family Fund (2012)  
 Ken and Becky Hansberry Fund (2001)  
*Swift Harvey Family Fund* (2014)  
 J. Allan Hauter Memorial Fund (2004)  
 Hebb Charitable Fund (2003)  
 HEIRS Fund (1996)  
*Helen C. Powell Donor Advised Fund* (2015)  
 Helies Family Fund (2000)  
 Elizabeth D. Heller Fund (1987)  
 Henderson Fund (1996)  
 William H. and Jodi A. Hess Charitable Fund (2005)  
 Hewitt Family Charitable Trust Fund (1993)  
 Higgins Endowed Fund (2011)  
 Higgins Family Fund (2013)  
 Ann S. Higgins Fund (2001)  
 Hildreth Stewart Fund (2012)  
 Lucius T. Hill III and Wendy Y. Hill Fund (2000)  
 Petie Hilsinger Fund (1999)  
 Marc Hirschmann Foundation Fund (2002)  
 Hoffman Fund (1986)  
 Holberger Family Fund (1993)

Holland Family Fund (1993)  
 Gilbert H. Hood Family Fund (1980)  
 Emily C. Hood Fund (2011)  
 Robert Hooper Family Fund (2004)  
 Hourless Fund (1997)  
 Hamblin L. Hovey Institute Fund (1983)  
 Hoyt Family Fund (2000)  
 Hunt Fund for Children (2001)  
 Income Research and Management Charitable Fund (2013)  
 Interstitial Fund (2009)  
 J. Jill Compassion Fund (2002)  
 Mitchell & Diane Jacobs Fund (1998)  
 Jade Fund (2007)  
 JAHHELBE Fund (2002)  
 Hope and David Jeffrey Fund (2011)  
 Jochkan Charitable Fund (2001)  
 Stephen G. & Rosemarie Torres Johnson Family Fund (2000)  
 Jonas Family Fund (2000)  
 Hubie Jones Fund (2004)  
 Samuel Lamar Jordan Trust Fund (2000)  
 Jumping Rock Fund (2000)  
 Louis and Marcia Kamensky Donor Advised Fund (2010)  
 Beton M. Kaneb Fund (1983)  
 Albert J. & Diane E. Kaneb Family Fund II (1997)  
 Martin & Wendy Kaplan Fund (2006)  
 Kassler Family Fund (2000)  
 Elizabeth and Paul Kastner Foundation Fund (2008)  
 Kaufer Family Charitable Giving Fund (2004)  
 Kaye Charitable Fund (2003)  
 John & Anne-Marie Keane Foundation Fund (1997)  
 Keewaydin Fund (2001)  
 Sabina F. Kelly Catholic Charitable Fund (1991)  
 Kensington Capital Children's Fund (2002)  
 Keogh Family Fund (2000)  
 Kidder SBSM (Strong Body, Strong Mind) Fund (2005)  
 Kidder Smith Fund (2003)  
 M. R. Kidder Charitable Fund (2004)  
 Kindling Fund (2011)  
 John Thomas Kittredge and Charles R. Morehead Fund (2011)  
 KJN Family Fund (1997)  
 Kluchman Family Fund (1997)  
 Allen and Elizabeth Kluchman Fund (1997)  
 Klureza Family Fund (1997)  
 Pamela Kohlberg Fund (1995)  
 Stephen P. Koster Fund (1985)  
 Kravitz Family Fund (1993)  
 Krivickas Family Fund (2006)  
 Gregory and Deborah Laham Family Charitable Fund (2011)  
 Jay R. and Carol B. LaMarche Family Charitable Trust (2012)  
 LandWave Fund (2009)  
 Lash Family Charitable Fund (2014)  
 Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)  
*Leading By Example Fund* (2014)  
 Barbara Lee Family Foundation Fund (2004)  
 Paul and Mary Lee Fund (2013)  
 Roger & Clarissa Lee Family Fund (2009)  
 Thomas E. & Barbara B. Leggat Fund (1986)  
 Jo-Ann and Martin Leinwand Fund (1986)  
 Colman & Carol Levin Fund (2000)  
 Levine Family Charitable Fund (2003)  
 Levitt Family Fund (2000)  
*Levy Family Fund* (2014)  
 Henry R. Lewis Family Fund (2007)  
 Lissy Family Fund (2008)  
 John S. Llewellyn, Jr. Community Assistance Fund (1996)  
 LMG Fund (1997)  
 Marjorie L. and James M. Lober Fund (2010)  
 LOC Fund (2009)  
 Joan Locatelli Foley Memorial Fund D (1997)  
 GC & JW Lodge Fund (2000)  
 Longfield Family Foundation (2011)  
 Loomis Sayles Charitable Fund (2007)  
 Lord-Buck Fund (1996)  
 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)  
 Mann Family Fund (2010)  
*Margolin/Rushford Charitable Fund* (2014)  
 William G. Markos Fund (1982)  
 Evelyn A. Marran Fund (1983)  
*The Demond and Kia Martin Foundation* (2014)  
 Martin Fund (1998)  
 Mason-Brown Fund (2008)  
 Match School Scholarship Fund (2007)  
*Joan S. Mathews Charitable Fund* (2014)  
 Eric and Sue May Charitable Fund (2012)  
 Mayel Fund (1982)  
 May-McClain Charitable Gift Fund (2012)  
 Austin and Tiverton McClintock Gift Fund (2014)  
*Alice L. McDougall Donor Advised Fund* (2015)

Richard & Judith McGinnis Fund (1999)  
 Eleanor P. McIntyre Fund (2001)  
 McSweeney Family Charitable Fund (2009)  
 Medical Research Fund (1992)  
 Emily & Bernard H. Mehlman Fund (2002)  
 Mellowes Fund (1998)  
 Leila Yassa & David Mendels Fund (2000)  
 Thomas M. Menino Fund for Boston (2013)  
 Gilbert G. Menna Family Fund (1999)  
 Merritt's Way Fund (2013)  
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)  
 Meyer Foundation (2006)  
 Allan Meyers Fund for the Advancement of Careers in Disability (2000)  
 Michon Family Fund (1986)  
 Microsoft Unlimited Potential Fund (2005)  
 Mid-Century Fund (2004)  
 J. F. Middleton Family Fund (1995)  
*Milford Street Fund* (2014)  
 Mill River Foundation Fund (2004)  
 Gabrielle J. Miller Donor Advised Fund (2004)  
 Anita L. Mishler Education Fund (1983)  
 Moccasin Brook Fund (2000)  
 The Modi Family Pass The Luck Foundation (2012)  
 Molino Family Fund (2003)  
 Monadnock Fund (2002)  
 Mormann Family Fund (2006)  
 Andy Morris and Lynne Salkin Morris Family Fund (2011)  
 Robert S. Morris Advised Fund (2000)  
 Sykes Moyer Fund (2005)  
 Muddy Pond Trust Fund (1994)  
 Munger Family Fund (2001)  
 Bob & Alison Murchison Fund (2014)  
 Murchison/Silvia Charitable Gift Fund (2009)  
 Murphy Family Fund (2014)  
 Mussafer Family Fund (2013)  
 Myrtle Field Fund (2004)  
 Mystic Harmony Fund (2000)  
 Mystic River Watershed Environmental Fund (2011)  
 Paul F. Nagle Memorial Fund (2006)  
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)  
 Tami E. Nason & Kent A. Lage Fund (2005)  
 Jean F. and David G. Nathan Fund (1986)  
 New Beginnings/Kidder Fund (2004)  
 New England Temperature Solutions (2013)  
 Next Door Fund (2005)  
 North Conway Institute Fund (2001)  
 Chad & Lia Novotny Fund (2002)  
 Kathryn Novotny Fund (2007)  
 Nicholas Novotny Fund (2007)  
 Novotny/Ramirez Donor Advised Fund (2002)  
 Novotny/Swahnberg Fund (1997)  
 Dupre-Nunnely Charitable Gift Fund (2007)  
 O'Brien Family Fund (2006)  
 Vania and Barbara O'Connor Charitable Fund (2013)  
*One Foot Plan* (2015)  
 Ones Fund (2004)  
 Orchard Hill Fund (2013)  
 Orpheus Fund (2002)  
 Owen Marie Fund (2012)  
 Morgan Palmer Charitable Fund (1982)  
 John J. Pappenheimer Fund (1995)  
 The Park Family Charitable Fund (2013)  
 Parker Family Fund (2000)  
 Field Parker Fund (1996)  
 Partnership Fund in honor of Anna Faith Jones (2001)  
 Alfred Nash Patterson Foundation for the Choral Arts Fund (1979)  
 Payne's Creek Fund (2001)  
 Payson Family Fund (2000)  
 Samuel Perkins and Nancy Reed Fund (1996)  
 Sheila and Sara Perkins Fund (1996)  
 Perkins Improvements Fund - William (1996)  
 John A. Perkins, Jr. Fund (2000)  
 Robert C. Perkins Fund (2000)  
 Peter Fund (2000)  
 Petersen Family Fund (2001)  
 Philancon Fund (1990)  
 Katherine A. & Fannie Phillips Fund (1997)  
 Picard Family Fund (2000)  
 Jamie Pierce & Rick Cresswell Fund (2002)  
 Karen Odessa Piper Charitable Gift Fund (2013)  
 Plimpton - Shattuck Fund (2005)  
 Pluhar Family Fund (2014)  
 Renata Poggioli Fund (1991)  
 The Poler Family Foundation (2008)  
 Pool Family Fund (1997)  
 Poss-Kapor Family Fund (1996)  
 Pride in Scholarship Fund (1992)  
 Fred & Ruthann Prifty Fund (2001)

Primary Care Progress Fund (2011)  
 Thomas & Mary Prince Family Fund (2000)  
 Joseph G. Prone Foundation (2014)  
 Sue and Bernie Pucker Fund (2002)  
 Donald and Frances Putnoi Charitable Fund (2006)  
 Peg Pyne Fund for Handicapped Access (1985)  
 Quid Nunc Fund (2001)  
 Sidney R. & Esther V. Rabb Family Fund (1983)  
 Barbara & Yale Rabin Fund (2002)  
 Radtke Family Fund (1996)  
 Otto W. Ramstad Fund (1998)  
 Bessye Bedrick Ravelson Fund (2003)  
 Gene Record Fund (2002)  
 Sara Delano Redmond Fund (1996)  
 Remmer-Fox Family Fund (1995)  
 Reno Family Charitable Foundation (1998)  
 Edward S. Reynolds Memorial Fund (1984)  
 Rhyme and Reason Family Fund (2000)  
 Riptide Fund (2002)  
 Jonathan Rizzo Memorial Foundation Fund (2001)  
 Roberts Family Fund (1995)  
 Roberts-Belove Fund (2004)  
 Robynhood Thanksgiving Fund (2002)  
 Rosedune Fund (1970)  
 Rosen Family Fund (2008)  
 Lindsey A. Rosen Fund (2011)  
 Daniel and Brooke Roth Charitable Gift Fund (2007)  
 Rothman Charitable Fund (2014)  
 Rotman-Attardo Family Fund (2005)  
 Rust Bowl Fund (1987)  
 Ronni Sachs Kotler Family Fund (2007)  
 Saffron Circle Fund (2006)  
 David Salten Fund (2007)  
 Risha C. and Paul A. Samuelson Fund (1982)  
 Samuelson Family Gift Fund (2012)  
 Sands Family Fund (2011)  
 Kazanjian Sargeant Fund (1996)  
 Schawbel Family Fund (1995)  
 Margaret M. Schmidt and Kenneth J. Danila Fund (2004)  
 Schott Fund (1999)  
 Schumann Family Fund (2005)  
 Joel Schwartz Family Fund (2000)  
 Schwinn Family Charitable Foundation (2011)  
 Charles S. and Zena A. Scimeca Charitable Fund (2004)  
 September Fund (2000)  
 A Servant's Heart (2014)  
 Norman and Maryellen Sullivan Shachoy Fund (1997)  
 Shames/Egasti Fund (1991)  
 Shapiro/Fleishman Fund (1999)  
 Douglas Boyd Sharpe Donor Advised Fund (2006)  
 Shawkemo Fund (2000)  
*SheGives Fund* (2014)  
 Bob and Jean Sheridan Family Fund (2012)  
 Sherman Family Foundation Fund (2005)  
 Jon Shevell Cancer Fund (2010)  
 Jon Shevell Children's Fund (2010)  
 Jon Shevell Education Fund (2010)  
 Shields Family Fund (2006)  
 William U. & J.W. Shipley Fund (2001)  
 Shoe Box Foundation Fund (2004)  
 Jean Karpas Siegel Fund (1994)  
 Silvia-Chandley Fund (2014)  
 John and Susan Simon Boston Foundation Fund (2007)  
 Ellen L. Simons Fund (1997)  
 Sixty-Nine Roses Charitable Foundation (2011)  
 Skylight Fund (2000)  
 Fay Slover Fund (2010)  
 Ellin Smalley Fund (1987)  
 Austin & Susan Smith Fund (1999)  
 Clark R. and Trina H. Smith Family Fund (1990)  
 J. Alper Smith Fund (1996)  
 Nancy and George Soule Family Fund (1997)  
 Sparky Foundation Fund (2003)  
 Spector Fund (2001)  
*Spencer Family Charitable Fund* (2014)  
 David F. Squire Family Fund (1997)  
 State Street Fund (2012)  
 Staufenbiel Aley Fund (2009)  
 Harvey & Shirley Stein Fund (1999)  
 Stewart Fund (2006)  
*Stith Hope Fund* (2014)  
 Tracy Stewart Fund (2009)  
 Elihu and Lillian Stone Family Charitable Fund (2003)  
 James M. and Cathleen D. Stone Foundation (1995)  
 Robert Strange Family Fund (2003)  
 Charles Sugnet Fund (1998)  
 Joshua Sugnet Fund (1998)  
 Suhrbier Family Fund (2005)  
 Nancy L. Sullivan Fund (1989)  
 Diane Sullivan-Villano Fund (1998)  
 Sunrise Fund (1993)  
 Susan F. Schaeffer Fund (2013)

Sylvan Fund (1985)  
TechFoundation Fund (2002)  
Tempero Family Fund (2002)  
Marc Thompson & Maureen Conway Family Fund (2008)  
Thomsen Family Fund (2000)  
Susan and Michael Thonis Fund (2005)  
Thorvale Fund (2007)  
***TK Foundation*** (2014)  
Scott and Jennifer Tobin Charitable Fund (2004)  
Topol Family Fund (1991)  
Trefler Fund (1997)  
Elizabeth Trichel Joyce Family Fund (2007)  
The Tuukka Rask Foundation (2013)  
Tye Charitable Fund (2006)  
Joseph Bishop Van Sciver Fund (1861-1943) (1997)  
Nancy J. Vickers Fund (2006)  
***Violet Iris Fund*** (2014)  
Vizzini Fund (1997)  
Ann & Robert von der Lippe Fund (1997)  
JH & EV Wade Fund (1990)  
James and Margaret Wade Fund (1997)  
Walker Fund (1998)  
Walsh Brothers Foundation Fund (2010)  
The Walter/Capone Fund (2010)  
Ruth and Henry Walter Funds I, II, & III (2010)  
J. H. Walton Family Fund (1986)  
Mitchell and Barbara Freedman Wand Charitable Fund (2013)  
Warner Charitable Gift Fund (2000)  
Mimi Chandler Watt Fund (2008)

Anita Barker Weeks Charitable Gift Fund (2011)  
Gordon Weil, Jr. Fund (2010)  
Weiss Charitable Fund (2004)  
Wellesley Hills Congregational Church Outreach Fund (2007)  
Janet White Memorial Scholarship Fund (2004)  
Whitehead - Sayare Fund (2008)  
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)  
Wesley L. Winship Fund (1998)  
Winsor Foundation Fund (1989)  
Jack & Judith Wittenberg Fund (1997)  
Howard L. Wolf Memorial Fund (1981)  
Michael N. Wood Fund (1996)  
Zabin Charitable Fund (2001)  
Emily Zofnass Fund (1998)  
T. Zouikin Charitable Fund (2003)  
Zug Family Fund (2008)

*Note: In addition to the 28 new Donor Advised Funds listed in bold italics above, there were six new anonymous Donor Advised Funds in fiscal year 2015.*

## Support Organizations

Bruce J. Anderson Foundation, Inc. (1980)  
Deshpande Foundation (2007)  
Horace Moses Foundation (1995) to support Junior Achievement  
James M. and Cathleen D. Stone Foundation (1994)

## Designated Funds

**D**esignated Funds have been established by donors to support the organizations or issues they care about most. Through these funds, many nonprofit institutions receive crucial annual support and a number of important issues are strengthened every year. The year each fund was established is listed in parentheses. New Designated Funds are bolded and italicized.

1819 Greek Revival Renewal Fund (2011)  
ACCESS Education Fund (1985)  
Fund for Adult Literacy (1985)  
Rae and Aaron Alberts Foundation Fund (2002)  
Rae and Aaron Alberts Foundation Fund II (2005)  
Frank E. Anderson Fund (1975)  
***Chip & Barbara Angle Fund*** (2014)  
***Area IV Fund*** (2014)  
Artists Foundation Endowment Fund (1984)  
Red Auerbach Youth Foundation Fund (1983)  
Lilian G. Bates Fund (1951)  
Be the Change Fund (2007)  
Grace & Floyd Lee Bell Fund (1987)  
Boston Ballet-E. Virginia Williams Endowment Fund (1983)  
Boston Bar Association Endowment Fund (1983)  
Boston Baroque Fund (2003)  
Boston Schoolyard Funders Collaborative (1995)  
Richard L. Bowser Fund (1985)  
BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)  
BPE/Support for Early Educational Development Fund (1985)  
Herbert Brandshaft Scholarship Fund (2007)  
Annie L. Breckenridge Trust Fund (2000)  
Brookline Youth Concerts Fund (1995)  
Michael and Stella Buonsanto Charitable Fund (2013)  
Charles T. Burke Fund for the Watertown Boys and Girls Club (1994)  
Charles T. Burke Fund for the Watertown Free Public Library (1994)  
Agnes T. Carruth Fund (1983)

James F. Casey Fund (1949)  
Dr. Walter Channing Memorial Fund (1933)  
Charles River Parklands Stewardship Fund (2002)  
Charter Schools Prize Fund (2013)  
Philip P. Chase Fund (1955)  
Julia Child Fund (1979)  
Ellen D. Cholerton Fund (1969)  
Ernest & Vera Clivio Charitable Memorial Fund (1981)  
Committee to Light Commonwealth Avenue Fund (2011)  
Elizabeth Cook ACF Student Fund (1997)  
Almon B. Cook-Relief Fund (2001)  
Allyn Cox Fund for Essex County Greenbelt (1994)  
Thomas G. Curtin - Bobby Kargula Nanae Fund (2009)  
Dedham Choral Society Endowment Fund (1991)  
Harry Ellis Dickson Youth Concerts Fund (1982)  
Joy & George Dryfoos Charitable Fund (2012)  
Duggan Charity Fund (1998)  
East Boston Social Centers, Inc. Fund (1996)  
Douglas A. Eaton Memorial Fund (1962)  
William V. Ellis Fund for Our Lady of Good Voyage Carillon (2011)  
Ruby C. Emerson Fund (1966)  
English High School Class of 1934 Award Fund (1994)  
The English High School-John P. Murphy Scholarship Fund (1996)  
Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008)  
Philip M. Fagan Family Fund (1971)  
Paul R. & Jacqueline D. Fehrenbach Family Fund (1999)



**The Students of Selma Fund** was created by Bennie and Flash Wiley to make it possible for students in Greater Boston to see the film *Selma*, the historical drama about Martin Luther King's voting rights marches in Alabama in 1965. The first such fund was established in New York City and quickly spread throughout the country, raising a total of \$2.5 million in 33 cities. Some 11,000 students in Greater Boston experienced the film with the support of the Students of Selma Fund, which raised more than \$120,000.

Benjamin M. Feinberg Fund (1962)  
 Arthur Fiedler Esplanade Concerts Fund (1980)  
 Mark Hayden Fineman Chess Tournament Fund (1985)  
 Felix Fox Memorial Fund (1974)  
 Americo Francisco Fund, Estate & Realty/Charitable Trusts (1998)  
 Peter Marshall French Memorial Fund (1976)  
 Gaywest Farm Fund (1994)  
 Agnes A. Gidley Memorial Fund (2013)  
 John & Ethel Goldberg Fund I (1984)  
 John & Ethel Goldberg Fund IV (1984)  
 John & Ethel Goldberg Fund V (1984)  
 John & Ethel Goldberg Fund VI (1984)  
 Bessie P. Goldsmith Fund (1994)  
 Barbara W. & Frank B. Gopen Fund (1978)  
 Walter W. Gove Fund (1972)  
 Elizabeth Grant Fund (1980)  
 Greatrex Scholarship Fund (1988)  
 Rosario Fajardo Hagan Fund (1991)  
 Patricia Jellinek Hallowell Fund (1992)  
 Hastings-Plummer Fund (1940)  
 Jorge N. Hernandez Fund (1987)  
 Gertrude Hooper Fund (1996)  
 Madeleine C. Huiginn Fund (1993)  
 Blanche Hyslop Fund (1982)  
 Orchestra of Indian Hill Music Director Fund (2002)  
 James W. & Margaret A. Ingraham Charitable Fund (1992)  
 Ella Jackson Artists and Scholars Fund (1982)  
 Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2013)  
 Patrick F. Jones, Jr. Endowment Fund (1981)  
 Donaldson F. Jones Fund (1999)  
 William & Sean Kelley Scholarship Fund (2010)  
 Kellogg Foundation Grant Operating Fund (2006)  
 John F. Kennedy Library Foundation Endowment Fund (1984)  
 Demetra Kenneth-Brown Fund (1920)  
 Alice V. Kidder Fund (2001)  
 Robert D. and Sally G. King Fund (1999)  
 Kit Clark Senior Services Fund (2000)  
 Gerald V. Levreault & Claire H. Levreault Fund (2001)  
 Lawrence B. Lewis Fund (1957)  
 Ralph Lowell Fund (1982)  
 Arthur Maass Trust Fund (2001)  
 Gertrude F. & Henry L. Maurer Fund (1998)  
 John S. McCann Fund (2000)  
 MHEAC Fund for ACCESS (1986)  
 Dorothy Morse Endowment Fund (1999)  
 Harry D. Neary Fund (1950)  
 Neighborhood Preservation Initiative Fund (1995)  
 New England Aquarium Education Fund (1983)  
 New England Forestry Foundation Fund (1996)  
 New England Women's Club Fund (2001)  
 Roger L. Nichols Internship Program Fund (1984)  
 Lottie S. Page Fund (1984)  
 Robert Treat Paine Historical Trust Fund (1990)  
 Palazzo San Gervasio Library Fund (1994)  
 William Morgan Palmer Fund (1977)  
 Harold Peabody Memorial Fund (1992)  
 Permanent Fund for Vocational Education (1979)  
*John M. Pero Scholarship Fund* (2014)  
 Charles & Cornelia Pfaff Fund (1964)  
 Henry L. Pierce Fund (1958)  
 Emma K. & Richard Pigeon Fund (1955)  
*The Plimpton-Poorou Design Prize Fund* (2015)  
 Primary Care Fellowship Program Fund (1983)  
 Public School Management Research Fund (2002)  
 Charlotte F. & Irving W. Rabb Family Fund (1984)  
 Reading Visiting Nurse Association Fund (1976)  
 Rogers Fund of the Riverside Cemetery (1997)  
 Henry A. Root Fund (1926)  
 Rose Fund (1981)  
 Fund for Rosie's Place (1984)  
 Dr. Jordan S. Ruboy Charitable Fund (1998)  
 Sheep Pasture Fund (1994)  
 Bessie H. Short Fund (1997)  
 Dana P. & Maude E. Simpson Memorial Fund (1998)  
 Muriel & Otto Snowden Endowment Fund (1984)  
 Social Law Library Endowment Fund (1982)  
 Michael Spock Community Service Fund (1980)  
 Alison L. Stevens Fund (1976)  
 Eva and William Stillman Scholarship Fund (2013)  
 Miriam & Sidney Stoneman Fund (1984)  
*Students of Selma Fund* (2015)  
 Surfmen's Trust Fund (1977)  
*The Tarrant Cutler Family Science & Animal Fund* (2014)  
 Agnes & Lewis Taylor Fund (1962)  
 Frank B. Thayer Fund (1976)  
 Pauline Toumpouras Fund (2010)



United Way Millennium Fund for Children and Families (1999)

Ansin Fund (2002)

Chelsea Boys and Girls Club Fund (2000)

Connell Family Fund (2000)

Carol R. & Avram J. Goldberg Fund (2002)

Lawrence & Beth Greenberg Fund (2000)

Darlene & Jerry Jordan Fund for Children (2000)

Margarete McNeice Fund (2001)

David R. and Muriel K. Pokross Fund (2003)

Schoen Family Fund (1999)

Tom & Nancy Shepherd Fund (2001)

State Street Foundation Fund (2000)

J.C. Tempel Fund for Children (2001)

Vinik Family Fund (2000)

Peter and Pamela Voss Fund (2000)

Robert E. Wallace Memorial Fund of the Urban League (1992)

Inez Washabaugh Ward, PNP, Scholarship Fund (2011)

Bradford Washburn Fund (1980)

Bill and Estelle Watters Fund (1997)

Jane Wengren Fund (1979)

Stetson Whitcher Fund (1986)

Ernesto "Tito" Whittington Scholarship Fund (2007)

May J. Wikstrom Fund (1998)

Rudolph & Sara Wyner Prize Fund (1985)

## Scholarship Funds

Harry Ankeles Scholarship Fund (1992)

Blair Family AvalonBay College Scholarship (2012)

Francis J. Bresnahan Educational Scholarship Fund (1986)

Alex Castoldi Memorial Scholarship Fund (1981)

John J. Cattaneo III Fund (1984)

Paula Marie Danforth Memorial Scholarship Fund (1990)

deVille Fund (1994)

Eagle Bank-Frank E. Woodward Scholarship Fund (1985)

Americo J. Francisco Scholarship Fund (1993)

Albert Francis Gilmartin Memorial Scholarship Fund (2005)

Robert L. Gould Fund (1987)

Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)

Janey Fund Scholarship Program (1999)

Nixon Peabody Scholarship Program in Recognition of

Retired Managing Partners Robert S. Cummings,

Nestor M. Nicholas and Harry P. Trueheart, III (1997)

Stephen D. Paine Scholarship Fund (1999)

Francis P. Sears Scholarship Fund (1973)

Paul & Eleanor Young Fund (1988)

Youth Business Institute Scholarship (2014)

# High Impact Philanthropy Becoming a Donor



If you would like to measure your philanthropy by impact created, not just dollars given, the Boston Foundation is the ideal place for you. Boston Foundation donors expect a return on their investment—here measured in human good achieved.

## Solving the problems you care about

The Boston Foundation is a complete source of advice about grant making for individuals, families, foundations and corporations at any stage. If you want to give confidently and have the greatest impact on the causes you care about most, whether in Greater Boston or around the globe, we can help you bring it all together.

## Offering Donor Advised Funds and Private Foundation Alternatives

The Boston Foundation has been a Donor Advised Fund expert for more than 30 years. With hundreds of these funds and decades of experience working with donors, we can help you meet your charitable goals. Establishing a fund at the Foundation is ideal for those who want the prestige of a private foundation, but none of the administrative, legal, tax and regulatory burdens of a private foundation.

## Maximizing your giving with TPI

The Philanthropic Initiative (TPI), now a business unit of the Boston Foundation, is an internationally recognized provider of philanthropic consulting and management services. A pioneer in the field of strategic philanthropy for 25 years, TPI continues to advise individuals, families, foundations and corporations in the U.S. and around the globe, helping clients maximize the impact of their philanthropy by defining priorities and strategies, implementing programs and evaluating success. Building from the values and interests of each client, TPI delivers innovative, customized solutions.

## Supporting Systemic Change Through the Civic Leadership Fund

By working with the Boston Foundation, you become part of a dynamic community of change makers. Through policy leadership, the Boston Foundation has helped to leverage hundreds of millions of dollars in federal and state funds, pass legislation in K-12 education, restructure our community college system, provide crucial state funds for cultural facilities and much more. This work is supported by the Civic Leadership Fund at the Boston Foundation, which is contributed to by hundreds of donors every year.

## Helping You Plan a Lasting Legacy with the Permanent Fund for Boston.

As the Foundation's endowment, the Permanent Fund for Boston does today what it will do 100 years from now: It provides the resources the Foundation needs to respond nimbly to the most pressing issues of the day. We can help you plan a lasting legacy by creating a Named Fund or Field of Interest Fund as part of the Permanent Fund for Boston—and help you plan the best way to incorporate this kind of legacy giving into your estate planning, including gifts by will or trust, gifts of retirement plan assets and life insurance, and gifts that pay you income and preserve assets for your heirs.

For more information about becoming a donor or making a planned or legacy gift to the Boston Foundation, visit [www.tbf.org/solve](http://www.tbf.org/solve).



# Vision 2020

## Applying for a Grant



All of the Boston Foundation's discretionary grant making in Greater Boston relies on the resources of our endowment, the Permanent Fund for Boston, which represents some \$16 million of the Foundation's overall giving annually. The Permanent Fund for Boston has been built over the years through outright gifts and bequests from Boston area donors who care deeply about our community.

### Five Impact Areas and Two Crosscutting Strategies

The Boston Foundation's five impact areas guide much of our grant making as well as our research, convenings, public policy work and special initiatives. The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with the Foundation's five impact areas:

- Education
- Health & Wellness
- Jobs & Economic Development
- Neighborhoods & Housing
- Arts & Culture

Visit [www.tbf.org/grants](http://www.tbf.org/grants) for detailed goals for each of these Impact Areas.

The Boston Foundation also has two Crosscutting Strategies:

Our **NONPROFIT EFFECTIVENESS** strategy aims to strengthen the Massachusetts nonprofit sector and enhance the impact of the Foundation's grantees. Work in this area includes the Giving Common, an open online database with more than 1,000 nonprofit profiles connecting donors, funders and other stakeholders. See more at [www.givingcommon.org](http://www.givingcommon.org).

The **GRASSROOTS** strategy seeks to respond quickly and nimbly to community needs, with grants that range from \$200 to \$10,000 to grassroots organizations that are anchored in Boston's neighborhoods.

### Types of Grants

#### Grants Aligned with Our Five Impact Areas

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale. We emphasize deep and long-lasting partnerships with nonprofits that are closely aligned with our five primary impact areas.

The Foundation makes general operating support grants to core partners on a quarterly basis, without specific deadlines for proposals, as well as program and project grants where appropriate. Nonprofit organizations that are eligible for these grants are encouraged to begin by contacting a program director.

## Open Door Grants

The Boston Foundation is also responsive to the needs and opportunities expressed by the community and supports important organizations and promising ideas that do not align with the goals and methods pursued within our five impact areas.

Both new and existing nonprofit organizations in Greater Boston can apply for Open Door Grants to support efforts to meet existing needs, including organizational capacity building as well as the testing of new ideas and innovations that address the most critical challenges facing our community.

There are four deadlines every year and grants are made for one year at a time and for up to two consecutive years. Generally, grants range from \$10,000 to \$50,000 and support:

- Innovative and emerging ideas for new or existing organizations;
- Proven ideas from existing organizations; and
- Capacity building for new and existing organizations.

Visit [www.tbf.org/grants](http://www.tbf.org/grants) for detailed guidelines for applying for both types of grants.



# 2015 Financials

**T**he **Boston Foundation** has a mandate both to fulfill its role as Greater Boston’s community foundation today—by maximizing the dollars available for making grants—and ensuring that the charitable dollars entrusted to the Foundation are available to continue this work tomorrow and in perpetuity. Robust development efforts and a well-diversified investment strategy enable the Foundation to meet these objectives.

## Fund for the 21st Century

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

## Financial Oversight

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

### INVESTMENT PERFORMANCE: as of June 30, 2015

	1 YEAR	3 YEARS	5 YEARS	10 YEARS
<i>Fund for 21st Century Investment Options:</i>				
Balanced Plus Pool	2.2%	9.4%	8.9%	6.3%
Balanced Pool (established 2/1/11)	<.5%>	8.2%	n/a	n/a
Short-Term Pool (established 1/1/10)	0.06%	0.08%	.11%	n/a
<i>Benchmarks:</i>				
65% MSCI A.C. World/35% Citigroup World Bond Index	<2.7%>	7.4%	8.2%	5.6%
MSCI All Country World Stock Index	.7%	13.0%	11.9%	6.4%
S & P 500 Stock Index	7.4%	17.3%	17.3%	7.9%
Citigroup World Bond Index	<9.0%>	<2.4%>	1.1%	3.1%

The assets of the Balanced Plus Pool include not only traditional stock and bond investments, but participation in private equity, venture capital, real assets (real estate, timber and energy) and flexible capital strategies. Diversification among multiple asset classes helps to reduce the volatility of the Foundation’s endowment and should moderate market risk.

## 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 2015 spending rate was 6.4% for its permanently restricted discretionary funds. For Fiscal Year 2016, the Board again approved a spending rate of 6.4% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the 6.4% spending rate applied to the current market value. The approved spending policy rate for designated endowment funds is 5.0% for Fiscal Year 2016.

## The Philanthropic Initiative

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2015, the operations of TPI added \$2 million of service fee income to the operations of the Foundation.

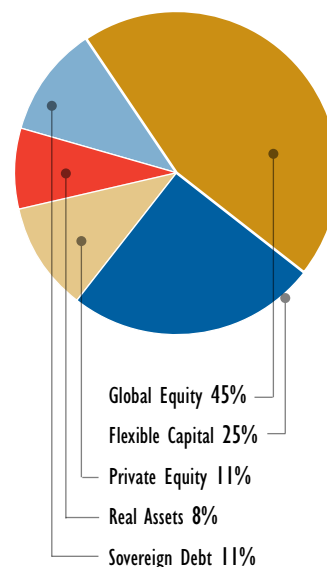
## Financial Analysis

Total assets of the Boston Foundation decreased slightly from \$1 billion to \$992 million at June 30, 2015. For the year, net investment returns for the Balanced Plus Pool were 2.2%. During this period, the Foundation received \$123 million in contributions and paid \$135 million in grants. Expenditures for program support and operating expenses totaled \$19.8 million thus explaining the change in total assets. The investment environment was positive during the year and the Foundation continued its investment in the communities that it serves.

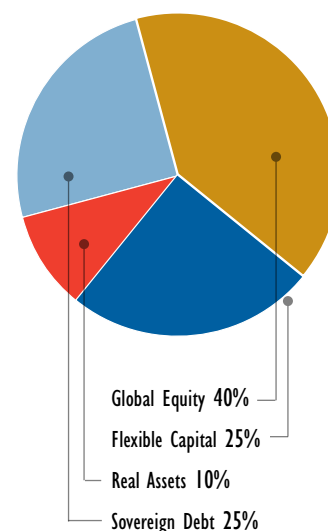
## Audited Financial Statements

The Foundation’s financial statements are prepared under policies and procedures overseen by the Foundation’s independent Audit Committee and the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown on page 54. The audited statements and Form 990 are available on our website at [www.tbf.org](http://www.tbf.org).

**ASSET ALLOCATION**  
Balanced Plus Pool



Balanced Pool



## 2015 and 2014 Summary Financial Statements (in thousands)

	2015	2014
<b>Assets:</b>		
Investments	\$ 958,273	\$ 971,648
Receivables & Other	9,215	7,329
Cash Equivalents	24,765	24,717
Total Assets	\$ 992,253	\$ 1,003,694
<b>Liabilities &amp; Net Assets:</b>		
Accounts Payable and Other Liabilities	\$ 5,894	\$ 6,486
Grants Payable	668	9,267
Net Assets	985,691	987,941
Total Liabilities & Net Assets	\$ 992,253	\$ 1,003,694
<b>Revenues:</b>		
Contributions	\$ 122,531	\$ 111,891
Service Fee Income	1,896	1,954
Net Investment Return	20,589	128,662
Total Revenues	145,016	242,507
<b>Grants &amp; Expenses:</b>		
Grants	127,264	110,566
Change in Split Interest Trusts	197	310
Program Support	4,504	6,651
Operating Expenses	15,301	14,486
Total Grants & Expenses	147,266	132,013
Change in Net Assets	<2,250>	110,494
Net Assets Beginning of Year	987,941	877,447
Net Assets End of Year	\$ 985,691	\$ 987,941

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



# Board of Directors

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



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