



Look at What We Accomplished Together

The Boston Foundation 2019 Annual Report

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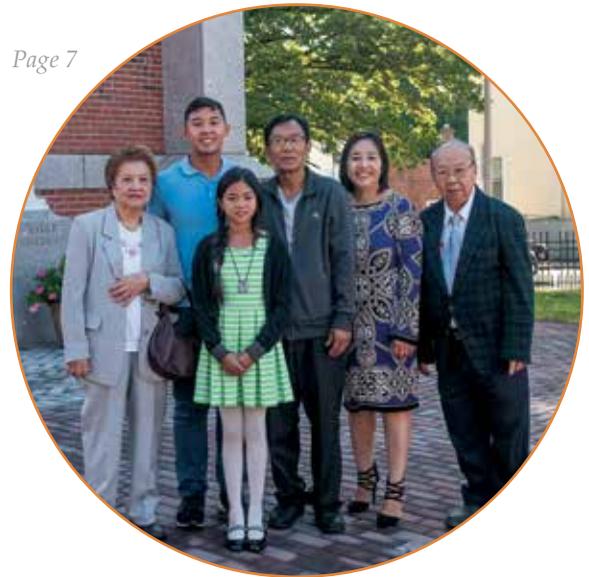
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LOOK AT WHAT WE ACCOMPLISHED TOGETHER

Stories about the power of partnerships

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ABOUT THE BOSTON FOUNDATION

OUR VALUES STATEMENT

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

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.

OUR YEAR IN NUMBERS

In 2019, the generous people of Greater Boston made
\$151 million in funds received.

We thank our new donors and those who added to their Donor Advised Funds and other funds, bringing our **total assets** to **\$1.3 billion**.

Thanks to the hundreds of donors to the Permanent Fund for Boston since 1915, we made **780 grants** in Greater Boston through our discretionary funds.

Families, individuals and companies who partner with the Boston Foundation through Donor Advised Funds made grants totaling **\$126 million**, with **\$71 million** going to nonprofit organizations in Greater Boston.

More than **500 donors** helped us surpass our goal for the Annual Campaign for Civic Leadership, raising more than **\$3 million**.

Thanks to numerous partners in research, we released **15 reports** on everything from housing to workforce development to demographic change and more than **4,000 people** participated in our forums.

In all, **125 outside organizations** were welcomed to our space for meetings.

The numbers tell only one small part of our story. Read this report to learn about some of the hundreds of partners who work with us every day to make Greater Boston even greater. Look at what we accomplished together.

INTRODUCTION

Look at what we accomplished together in 2019. It was a big year thanks to you: our donors, our partners in research, nonprofit leaders, other funders, grassroots activists and our close allies in business and in government. It was a big year for recognizing how diverse we are as a city and helping those who are struggling in the midst of this booming economy. It was a big year for focusing on the entire education pipeline—from early childhood to the next generation of workforce development. It was a big year for lifting up artists and advocating for affordable housing and vibrant public places. And it was a big year for honoring our past to inform our future. Thank you to everyone who contributes to our work—and everyone who cares deeply about Greater Boston. We are stronger when we work together to meet our city and region's challenges. Thank you for being a part of the solution.



Sandra M. Edgerley
Chair, Board of Directors



Paul S. Grogan
President & CEO

EXPLORING OUR SPLENDID DIVERSITY

"CHANGING FACES OF GREATER BOSTON," a report from our research center Boston Indicators and five UMass institutes, made the front page of the *Boston Globe* with the news that virtually all of our region's population growth since 1990 has been driven by immigrants of color.



Data have stories to tell: One is about Dorchester's Fields Corner, which has a diverse population, including some **13,000** Vietnamese Americans. Half of all businesses in the neighborhood are Vietnamese-owned.





CELEBRATING TEACHERS

BOSTON EDTALKS is an annual event that gives educators a platform for sharing the challenges, opportunities and rewards of life in and around the classroom. Hosted by the Boston Foundation, Boston EdTalks is held during Teacher Appreciation Week to recognize and celebrate innovation and expertise in education.

Educators across the entire K-12 pipeline share unique ideas and bold approaches to teaching. The topics range from enlivening first-grade science to learning far beyond the classroom to creative ways to retain teachers of color.

WBUR's CitySpace was the site of the eighth annual Boston EdTalks. The display of teachers' observations and latest practices dazzled and moved the audience.



LIFTING UP GRASSROOTS CHANGE MAKERS

Civil rights leaders, community organizers, activists for the arts, immigrants and the transgender community... The 2019-2021 Class of **BOSTON NEIGHBORHOOD FELLOWS** is an inspiring group of 11

community leaders—working hard to advance the quality of life in Greater Boston. The Fellows receive a two-year grant, leadership training and the opportunity to network with other change makers.

“This is a diverse group of people who play a variety of roles, and have one remarkable thing in common: a deep commitment to making their community—our community—a better, safer, more equitable place.”

—Orlando Watkins
Vice President for Programs, The Boston Foundation



Total number of Fellows since 1990

*Fellows Chastity Bowick
(left) and Kaden Mohamed
are advocates for
transgender rights.*





HELPING ARTISTS SOAR

We recognize and support artists' essential contributions to creating and maintaining a thriving, healthy and innovative city. As such, the Boston Foundation—in partnership with the Barr Foundation—funds **LIVE ARTS BOSTON**, which offers grants of up to \$15,000 to individuals and small companies to create, present or produce new works.

\$2.3 MILLION

Total invested through 186 LAB grants

1,000+

Number of performances supported

71%

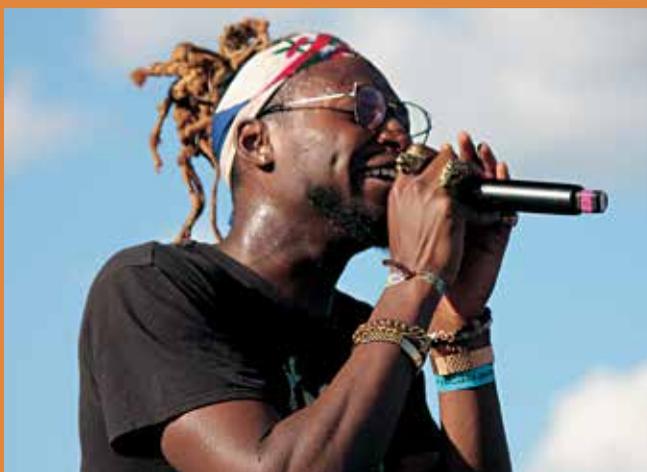
Share of funded projects led by artists of color

Boston Art & Music Soul Festival (BAMS Fest), is an annual festival held in Franklin Park that lifts up performing artists of color.

Photos by Kristyna Young.



“Changing demographics do not, on their own, make communities more welcoming, inclusive, respectful and caring of each other. That requires intentionality. And it is one of the many reasons arts



and creativity are so vital.”

—from a Boston Globe op-ed by the
Barr Foundation’s Jim E. Canales and the
Boston Foundation’s Paul S. Grogan



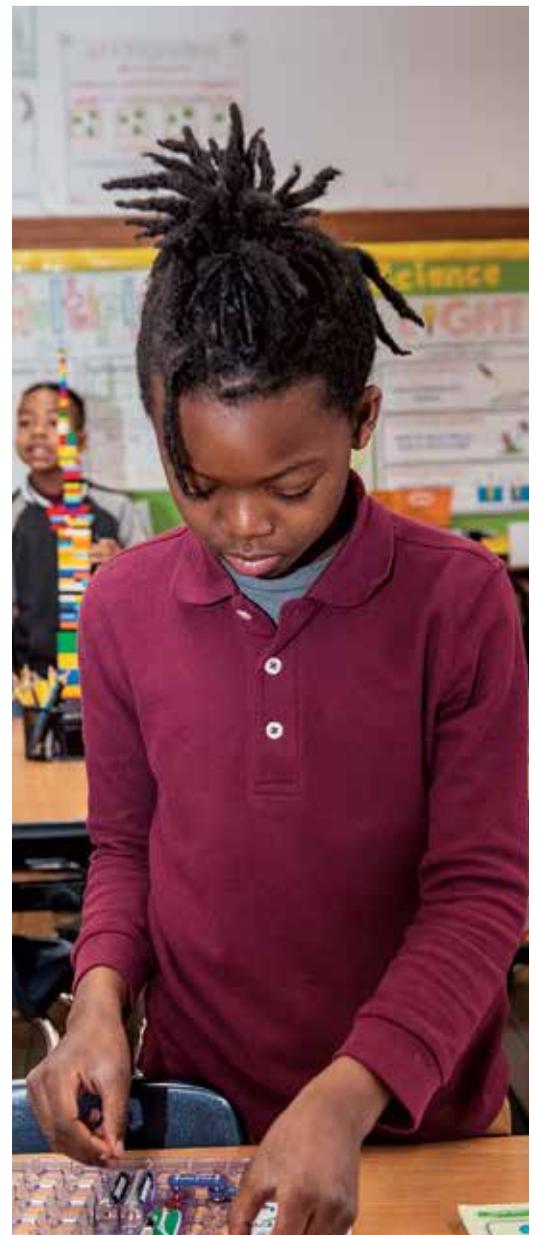
The Conservatory Lab Charter School of Boston orchestra

REWARDING INNOVATION

The Benjamin Banneker Charter School in Cambridge is a K-6 Commonwealth charter school that is known for its culture of persistence and its focus on STEAM (science, technology, engineering, arts and math). The Banneker was the 2019 winner of the **POZEN PRIZE FOR INNOVATIVE SCHOOLS**, which is given annually to recognize schools that consistently boost student achievement through innovative models, programs and practices. Winners receive an \$80,000 award, with the runners-up—this year the Conservatory Lab Charter School of Boston—receiving a \$10,000 prize.

\$54★,000

Total awarded by the Pozen Prize since it was founded in 2013 by donors Robert and Elizabeth Pozen



Students at Benjamin Banneker Charter School

INVESTING IN BLACK AND LATINX OWNED BUSINESSES

The **BUSINESS EQUITY FUND** at the Boston Foundation provides flexible and patient capital to successful, growing companies owned by people of color. Five businesses have received funding to date, including Tartt's Nursery School, Inc. The goals: new local jobs, wealth creation, strong communities.



Bessie Tartt Wilson founded Tartt's Nursery School, Inc. in 1946 and it has been passed down through the generations ever since. Tartt's provides high quality child care for Boston's families. Today, with capital from the Business Equity Fund, Tartt's is expanding to new centers and adding to its staff.



Total raised for the Business Equity Fund thanks to Eastern Bank and other investors

*The Tartt family from left:
Mary L. Reed, 2nd Generation; President;
Ken Reed, 3rd Generation, COO;
Nida Wright, 4th Generation, Vice President;
Wanda Geer, 3rd Generation, CEO.*





The first cohort of place-based leaders is as diverse as the communities they represent: community activists, open space champions, housing advocates and entrepreneurs.

Above: Bridgette Wallace, a member of the Roxbury Cultural District team, exploring Yu-Wen Wu's installation in Chinatown's Pao Arts Center.

Right from top: a farmer's market in Copley Square and a park in Post Office Square.

A NEW NETWORK FOR PUBLIC PLACES

A festival in Hyde Square. A sidewalk in Cambridge. A plaza in Chinatown. In a fragmented city, these are the shared community places that bring us powerfully together. This year, the Boston Foundation launched a pilot initiative—the **PLACE LEADERSHIP NETWORK**—that supports community leaders in preserving and enhancing the character of these vibrant, inclusive spaces.





INSPIRING KIDS IN THE SUMMER

Boston's summer programs have been part of the largest, most rigorous national study to date on summer learning, commissioned by the Wallace Foundation and researched by RAND Corporation. The 2016 report showed that students who attend summer learning programs at high rates outperform control groups in math, reading and socio-emotional skills and gain significant advantages throughout the entire school year.

Boston After School & Beyond holds programming on Thompson Island every summer.



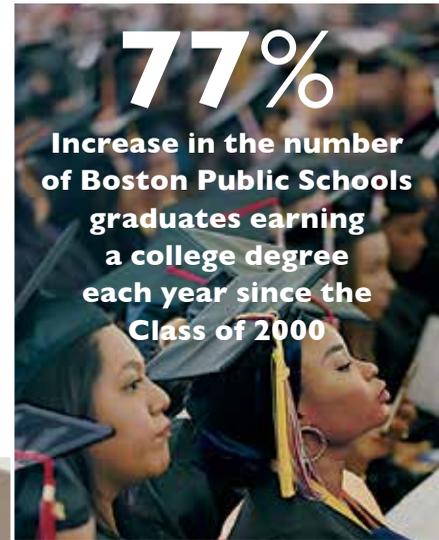
\$1 Million

*Total Boston Foundation
grants to Boston After
School & Beyond for summer
programming since 2009*



BOOSTING COLLEGE COMPLETION

Supporting, motivating and mentoring students as they follow their dreams is at the heart of **SUCCESS BOSTON**'s coaching model. Its goal over the last 10 years has been to dramatically increase college completion rates. It has done just that.



The coaching model has become so successful that it is now embedded in UMass Boston, Bunker Hill Community College and other higher education institutions.



REINVENTING WORKFORCE DEVELOPMENT

PROJECT CATAPULT is testing the next-generation of workforce development by investing in the exponential growth of Greater Boston's most effective, market-driven training and education strategies. While engaging employers as true partners, flexible resources are going toward building organizational capacity and the development of provider networks. The goal: develop locally-sourced talent to meet the demands of our tight labor market.

Project Catapult's original partners include JVS, the most prominent workforce development nonprofit in Boston.

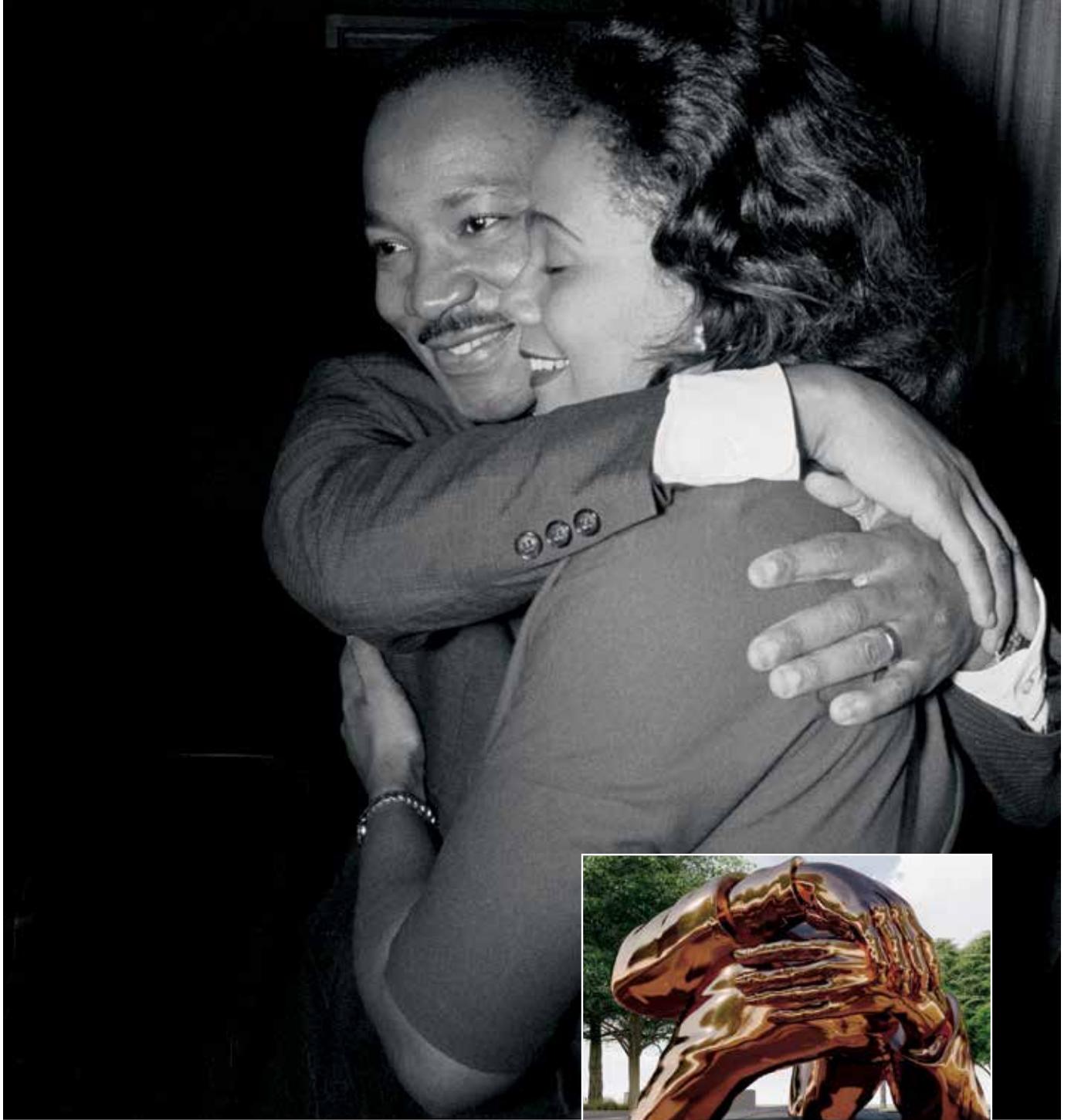




Resilient Coders is a nonprofit that trains young people of color for high-growth careers as software engineers.



King Boston held a series of teach-ins during 2019. The first was at the historic Arlington Street Church, where King found friendship and peace during his time in Boston.



EMBRACING OUR PAST AND FUTURE

We are honored to provide a home to **KING BOSTON**, which is:

Building a world-class memorial on Boston Common honoring
Martin Luther King, Jr. and Coretta Scott King

and

Building a \$1 million endowment with the Twelfth Baptist Church
to keep the dream alive through King-related programming

We thank King Boston's founder and co-chair Paul English and co-chair Rev. Liz Walker for their inspiring leadership.

OUR DONORS

Our closest
partners are
our donors,
who make
everything we
do possible.
We thank
them for
their deep
commitment
to our
community.

DONORS TO THE ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP

These contributions help us to serve as a think tank and advocacy organization, publish research into the most critical issues of our time and bring people together to exchange ideas, influence public policy and solve problems. We thank our donors for their generosity and support.

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

\$100,000+

Anonymous
Sandra and Paul Edgerley
Jack and Elizabeth Meyer
Jill and Niraj Shah

\$50,000-\$99,999

Anonymous (3)
Josh and Anita Bekenstein
Brian and Karen Conway
William and Ami Kuan Danoff
The Klarman Family Foundation
Linda Mason and Roger Brown
Dwight and Kirsten Poler

\$25,000-\$49,999

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Thomas and Lisa Blumenthal
The Boston Beer Company
Cummings Foundation
Michael and Barbara Eisenson
Epker-Sinha Foundation
Grace and Edward Fey
Giving | Grousbeck Fazzalari
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The Lynch Foundation
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Tim and Lynne Palmer
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Jane Timken
David and Louise Weinberg
Arthur M. Winn and Family

ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP

CAMPAIGN CO-CHAIRS BRIAN CONWAY AND JILL SHAH

In the Boston Foundation's 2019 fiscal year, more than 500 individuals, families and companies contributed to the Annual Campaign for Civic Leadership.

The campaign supports the Boston Foundation's research, forums, public policy and advocacy work—all with the goal of strengthening Greater Boston today and far into the future. We thank the co-chairs of the 2018-2019 Annual Campaign: Brian Conway, Chairman and Managing Partner at TA Associates and a Boston Foundation Board member; and Jill Shah, President and co-founder of the Shah Family Foundation. With their expert guidance and tremendous leadership we had a record year, raising more than \$3 million.



\$10,000-\$24,999

Anonymous (6)
 Karen and Jim Ansara
 Michelle and Bob Atchinson
 Bank of America Charitable Foundation, Inc.
 Katherine K. Brobeck
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 Alexi and Steven Conine
 Eileen and John M. Connors, Jr.
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 Paul English
 Eos Foundation
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 Thomas and Kate Gilbane
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 Robert and Diane Hildreth
 Albert and Diane Kaneb
 Stephen and Jill Karp
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 Sam Plimpton and Wendy Shattuck
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 Richard and Susan Smith Family Foundation
 C. David Swindell and Gail F. Goodman
 TJX Companies
 Gregory T. Torres
 Bruce and Kathleen Van Saun
 Wagner Foundation
 Robert L. and Jennifer S. Waldron

\$5,000-\$9,999

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 Barbara Jane Anderson
 Andrew Arnott
 Andrew and Melora Balson
 Blue Cross Blue Shield of Massachusetts
 Stephen and Alicia Bolze
 Boston Consulting Group
 Boston Partners
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 Ciccolo Family Foundation
 The Collatos Family Foundation
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 Jeffrey and Dana Davis
 Denham Capital Management
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 Douglas and Susan Donahue
 Sandhya Douglas
 The Drew Company, Inc.
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 GE Foundation
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 Lucius and Wendy Hill
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 Suffolk Cares Charitable Foundation, Inc.
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 Michael and Nancy Tooke
 Tufts Health Plan

\$2,500-\$4,999

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 Allyn Foundation
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 Gerald and Kate Chertavian
 Citizens Bank
 Eugene and Meredith Clapp
 Howard Cohen and Myra Musicant
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 LogMeIn, Inc.
 George and Ellen Lovejoy
 McCall & Almy, Inc.
 Thomas Melendez and Aixa Beauchamp
 James and Maureen Mellowes

Robert and Joan Murray
National Development
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Jerry Rappaport, Jr. and Lori Rappaport
Frank and Barbara Resnek
Rohda Family Charitable Foundation
Roger Snow and Harron Ellenson
Scott E. Squillace, Esq.
Jill and Michael Stansky
The Zug Family Fund

\$1,000-\$2,499

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David and Sharman Altshuler
Howard and Carol Anderson
The Apgar Family
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W. Gerald Austen and Patricia Austen
Robert Bechek and
Elizabeth Freeman Bechek
Roger and Anne Berman
Joan T. Bok
Boston Private Bank & Trust Company
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Marshall and Katharine Wolf
Danielle Oristian York
Peter and Ellen Zane

Up to \$999

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Alchemy Foundation
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Anthony and Jacqueline Baudanza
Allison F. Bauer
The Benevity Community Impact Fund
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Boston Bean Coffee Company

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 Max Heninger
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 Strategic Spaces
 Naomi Sweitzer and Andrew Shalit
 Benjamin and Kate Taylor
 Peter and Laurie Thomsen
 Steve Tompkins
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 Loren Van Allen
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 William Walczak
 Charles A. Walsh III
 Barbara Freedman Wand and
 Mitchell Wand
 Stephanie Ward
 WCVB-TV
 C.A. Webb
 Robert and Joan Weinstein
 Wellington Management Company,
 LLP
 Jean and William Whitney
 Christopher and Nancy Winship
 Katherine B. Winter
 Michael Yogman
 Albert and Judith Zabin
 Isa Zimmerman

GROWING THE PERMANENT FUND FOR BOSTON

At the heart of everything the Boston Foundation has done over the last century is the Permanent Fund for Boston. This essential fund was established through bequests left by forward-thinking Bostonians and has been strengthened by outright gifts. It supports innovative work in the arts, education, health, housing, workforce development and countless other important areas of community life.

DONORS TO THE PERMANENT FUND FOR BOSTON

The following list includes donors who have made gifts totaling \$1 million or more to the Permanent Fund for Boston, with the year of their first contribution noted in parentheses. Bold indicates that they are Centennial Circle Donors who committed \$1 million or more during the Boston Foundation's Centennial campaign.

Anonymous (1990, 2001, 2002, **2010, 2016, 2018**)
Charles Ansbacher Foundation (2015)
Estate of Reginald Benting (1984)
Brother Thomas Charitable Foundation (2008)
A. Page Browne, Jr. Trust (2006)
Franklin S. and Cynthia B. Browning (1997)
Estate of Winifred I. Clapp (1990)
Joseph E. Corcoran (2016)
Desh and Jaishree Deshpande (2018)
Sandra and Paul Edgerley (2015)
Estate of Lucy Fields (2009)
The Flow Fund (2015)
Paul and Patricia Gannon (2015)
Charles Hapgood Trust (2009)
Alfred C. Harcourt Trust (2002)
Theodore C. Hollander Trust (1994)
Barbara and Amos Hostetter (2008)
Estate of Francis C. Huvos (2003)
Jacobson Family Foundation (2016)
Robert K. Kraft and Family (2016)
Estate of James Longley (1918)
Mason Charitable Remainder Annuity Trust (2001)
Willis Munro Trust (1990)
Robert A. and Veronica S. Petersen (2016)
Stephanie and Brian Spector (2016)
Esther G. Stoddard Trust (2007)
Vingo Trust II (1994)

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

Anonymous (17) (1992-2019)
Estate of Alice A. Abbott (1967)
Rosalin Acosta (2013)
Pamela D. Adams (2016)
Estate of Edith Allanbrook (2003)
Estate of Emily T. Allen (2007)
Margaret Shaw Allen Trust (1982)
Estate of Matilda S. Alley (1964)
Estate of Miriam S. Alley (1965)
Joel Alvord and Lisa Schmid-Alvord (2015)
Margaret S. Atwood Trust (1970)
Estate of Margaret E. Babcock (1973)
Estate of Annie O. Baldwin (1953)
James R. Bancroft Trust (1983)
Bank of New York Mellon (1991)
Helen C. Barker Trust (1990)
Estate of Harriett M. Bartlett (1990)
Estate of Wilbert S. Bartlett (1969)
The Beacon Companies (1997)
Nancy Beals Trust (1984)
Estate of George P. Beech (2003)
Diane Beever Charitable Remainder Unitrust (2008)
Richard A. Berenson Family Trust (2000)
Nelson Bigelow Trust (1990)
Estate of William L. Birely (1959)
Dr. Barry Bluestone (2017)
Estate of Edmund Bridge (1933)
Estate of Frederick W. Bridge (1942)
Mr. and Mrs. Peter Brooke (1994)
Mabel M. Brown Trust (1991)
Peggy A. Brown (2008)
Katherine H. Browning Trust (1991)
Henry Burkhardt III (1986)

Estate of Jesse F. Burton (1971)
 Catherine and Paul Bittenwieser Foundation (1991)
 Cabot Family Charitable Trust (2001)
 Linda Cabot Black Foundation (2006)
 Estate of Susan Cabot (1947)
 William Putnam Cabot (1970)
 Kevin T. and Julie Callaghan (2016)
 Ellen E. Carroll Trust (1979)
 Estate of Charles T. Carruth (1983)
 Dorothy Jordan Chadwick Fund (2001)
 Fay M. Chandler (2001)
 Estate of Gladys Chiquoine (1983)
 Robert M. Christison Trust (1984)
 Estate of Helen A. Claflin (1992)
 Estate of William H. Claflin (1983)
 Combined Jewish Philanthropies of Greater Boston (1991)
 Commonwealth of Massachusetts (2009)
 Estate of Anastasia Conte (1988)
 Ford H. Cooper Trust (1982)
 Barry B. Corden (2012)
 Estate of Maria Corinne Dana (1963)
 Edward Hyde Cox Trust (2001)
 Michael F. Cronin (2004)
 Estate of Arthur S. Cummings (1943)
 Joan Pokross Curhan and Ronald C. Curhan (1990)
 Estate of Charlotte E. H. Curtis (1940)
 Theodore H. Cutler (2015)
 Anne H. Davis Trust (1964)
 Davis Family Charitable Foundation (2016)
 Gladys Dean Trust (1977)
 John H. Deknatel and Carol M. Taylor (2016)
 Luisita L. Denghausen Trust (1990)
 Martin Deutsch (1997)
 Grace L. Diggles Trust (1993)
 Estate of Kenneth S. Domett (1960)
 Phyllis G. Downing Trust (2001)
 Lisa J. Drapkin (2014)
 Estate of Mary Frances Drown (1929)
 Wm. Arthur Dupee Memorial Fund (1984)
 Dusky Foundation (2013)
 Eastern Bank Charitable Foundation (2014)
 Estate of George H. Eastman (1971)
 David J. Elliott and Hungwah Yu (2003)
 Paul Elliott Trust (1991)
 Virginia Ellis Memorial Fund (1976)
 Leon R. Eyges Memorial Fund (1963)
 George R. Farnum (1982)
 Mary C. Farr Trust (2006)
 First National Bank of Chicago (1990)
 Estate of Benjamin Fisher (1996)
 Estate of Barbara B. Fontaine (1997)
 Martha M. Fosdick Fund (1978)
 Estate of Edith R. Fottler (1948)
 Ruth S. Frake Trust Bequest (1981)
 Lucille Francis (2015)
 Estate of Alma L. Frost (1948)
 Estate of Anna C. Frothingham (1941)
 John Lowell Gardner Fund (1987)
 Estate of Forrest C. Gates (1970)
 Estate of Mary M. Geist (1982)
 Estate of Pauline S. Germeshausen (2006)
 Georgiana Goddard Eaton Memorial Fund (2018)
 Elizabeth D. Goldsmith Trust (2011)
 Grand Bostonians Dinner (1984)
 Estate of Anne C. Gray (2010)
 Donald Gregg (1963)
 Estate of Patricia Grisham (1964)
 Estate of Joseph Guild (1964)
 Estate of John H. Hagopian (2002)
 Estate of Ellen Page Hall (1931)
 Jean Hanlon (1991)
 Estate of Dorothy C. Harris (1967)
 Carrie A. Hartley Trust (1963)
 Estate of Elizabeth M. Hay (1972)
 Haymarket People's Fund (1994)
 Estate of Fred R. Hayward (1969)
 Helen P. Hennessey Trust (1984)
 Ada H. and Clara Hersey Trust (1955)
 Elizabeth D. Herteli Trust (2003)
 Vladimir N. Herteli Trust (2003)
 George L. Hill Trust (2002)
 Estate of Anna P. Hills (1969)
 Estate of Harry Holland (2008)
 Estate of Grace Scott Hollett (2005)
 Estate of Agnes G. Homes (1961)
 Katherine B. Hood (2001)
 Estate of Adeline D. Hooper (1973)
 Estate of Mary Frothingham Hooper (1961)
 Estate of Elizabeth B. Hough (2000)
 Donald J. Hurley Memorial Fund (1978)
 Jane W. Hyman (2002)
 Mark Hyman, Jr. Trust (1999)
 Institute for Affirmative Action (2007)
 International Council Trust (2000)
 Greg and Maria Jobin-Leeds (2015)
 Stephen P. Jonas (2007)
 Cyril H. Jones Trust (1974)
 Ross Jones and Emily Nielsen Jones (2015)
 Estate of Frances A. Jordan (1978)
 Estate of Ethel M. Joy (1993)
 Louis and Marcia Kamensky (2013)
 The Keane Family Foundation (1997)
 Mr. and Mrs. John F. Keane (2001)
 Vera Kilstein (2019)
 Estate of Paul Kimball (1964)
 Pauline Kleven Trust (1990)
 Estate of James G. Knowles (1982)
 Dr. and Mrs. Arthur R. Kravitz (1987)
 Estate of Louise P. Kush (1997)
 Aimee Lamb Trust in memory of Winthrop and Aimee Sargent (1980)
 Estate of Ida Fales Lamb (1967)
 Lambert Marital Trust (2007)
 Mr. and Mrs. Herbert Lee (1999)
 Thomas Lee (1997)
 Barbara Estabrook Livermore Trust (1982)
 Caleb Loring Jr. and Rosemary M. Loring (1997)
 George and Ellen Lovejoy (2015)
 Cora E. MacKenzie Trust (1973)
 Mr. and Mrs. Gael Mahony (1982)
 Anna E. Markus (2016)
 Estate of Clara N. Marshall (1943)
 Adalaide Sargent Mason Trust (1982)
 Mass Development (2003)
 Estate of Ann G. McFarlane (2000)
 Ethel Fay McGuire Trust (1973)
 Thomas Melendez and Aixa Beauchamp (2013)
 MFS Investment Management (2014)
 David D. Moir Revocable Trust (1991)
 Estate of Arthur W. Moors (1950)
 Reinier Moquete (2014)
 Gertrude Morrison Trust (1965)
 Estate of John Wells Morss (1940)
 Wilbert G. and Eunice Muttart Foundation (2007)
 Mrs. Robert B. Newman (2001)
 Nixon Peabody LLP (1997)
 Northern Trust (2006)
 The Overbrook Foundation (1990)
 Francis Ward Paine Foundation, Inc. (1982)
 Estate of John Adams Paine (1967)
 Estate of Winthrop D. Parker (1967)

Partners HealthCare System, Inc. (2014)
 Theodore G. Patterson Trust (2004)
 Estate of Mary F. Pearl (1997)
 Estate of Annie S. Penfield (1979)
 Phillip Perelmuter (2014)
 Janet S. Perkins Charitable Remainder Unitrust (2000)
 Philanthropic Collaborative, Inc. (2000)
 Estate of Blanche E. Philbrick (1965)
 Hetty R. Phillips Trust (1980)
 Estate of Mary N. Phillips (1974)
 Estate of J. Christie Pingree (1957)
 David R. Pokross, Jr. (1996)
 William J. and Lia G. Poorvu (1997)
 Robert O. Preyer Charitable Lead Unitrust (1992)
 Estate of Carrietta W. Proverbs (1984)
 Esther Frances Quinn Trust (1995)
 Mr. Robert A. Radloff (2000)
 Estate of Bertha J. Richardson (1975)
 Estate of Frank L. Richardson (1975)
 Estate of Charles E. Riley and Agnes Winslow Riley (1972)
 Mabel Louise Riley in memory of Charles Edward (1972)
 Harry & Minnie Rodwin Memorial Fund (1975)
 Harriet Rogers Unitrust (1990)
 Professor and Mrs. Walter J. Salmon (1997)
 Florence M. Scott Trust (1971)
 David and Marie Louise Scudder (2001)
 Estate of Helen S. Sharp (1966)
 Estate of Frank R. Shepard (1954)
 Arthur L. Sherin Trust (2008)
 Estate of Anne G. Shewell (1984)
 J. de Vere Simmons Trust (1985)
 Alice Wilder Smith in memory of Frank Langdon Smith (1968)
 Edson B. Smith Trust (1984)
 Estate of Eleanor Smith (1986)
 Irene C. Smith Trust (1975)
 Reynolds R. and Pamela M. Smith (2006)
 Florence Snelling Trust (2006)
 Dr. William Davies Sohie, Jr. (1990)
 Helen Spaulding (1990)
 Spaulding-Potter Charitable Trusts (1972)
 Estate of Francis M. Stanwood (1961)
 Estate of Albert J. Stone, Jr. (1960)
 Estate of Mary P. Stone (1948)
 Stephen and Sybil Stone Foundation (2003)

CENTENNIAL CIRCLE
SANDRA AND PAUL EDGERLEY

Sandra and Paul Edgerley are members of the Boston Foundation's Centennial Circle—generous donors who committed \$1 million or more to the Permanent Fund for Boston during the Boston Foundation's Centennial in 2015. The Edgerleys also supported the construction of the Edgerley Center for Civic Leadership at the Boston Foundation, a large public space that accommodates the Foundation's forums and other events. We thank Sandra Edgerley for serving as Chair of our Board of Directors over the last five years. During those years, she has guided us through a period of tremendous growth and service to this community. We honor her devotion to the community of Greater Boston, which has been strengthened immeasurably through her leadership.



Gertrude T. Taft (1956)
 Tech/Ops, Inc. (1982)
 Tiny Tiger Foundation (2001)
 Estate of Lenna R. Townsend (1952)
 Margaret Castle Tozzer Trust (1978)
 United Asset Management Corporation (1997)
 Estate of Willis S. Vincent (1940)
 Herb and Charlotte Wagner (2015)
 Clara Wainwright (1998)
 Wallace Foundation (1998)
 Estate of John M. Ward (1927)
 Leo Wasserman Foundation (1997)
 Estate of Madeline Cobb Webber (1973)
 Edwin S. Webster Foundation (2000)
 Estate of Louise M. Weeks (1944)
 Estate of Arthur W. Wheelwright (1963)
 Estate of Stetson Witcher (2008)
 Estate of Joseph A. White (1979)
 Estate of Edward E. Williams (1950)
 Estate of Lizzie A. Williams (1951)
 Estate of Mary Denny Williston (1998)
 Winston Salem Foundation (1991)

LEGACY SOCIETIES

Members of the Boston Foundation’s Legacy Societies are deeply committed to providing the Boston Foundation with the resources it will need—not only today, but into the future—in order to meet the ever-changing needs of our community.

We thank these generous donors and honor them here.

CENTENNIAL SOCIETY

BILL NIGREEN AND KATHLEEN MCDERMOTT



When Bill Nigreen and Kathleen McDermott began their long-term estate planning—including their legacy to the community—they turned for guidance to the Boston Foundation. The largest share of their community legacy is an unrestricted gift to the Permanent Fund for Boston, the Foundation’s most flexible fund and the one that addresses the broadest cross-section of community needs. The rest of their legacy gift will benefit the Annual Campaign for Civic Leadership, which supports the Foundation’s research, forums and public policy work, and the Boston Foundation’s Arts Fund.

CENTENNIAL SOCIETY

The following donors have confirmed legacy commitments of \$1 million or more to grow the Permanent Fund for Boston.

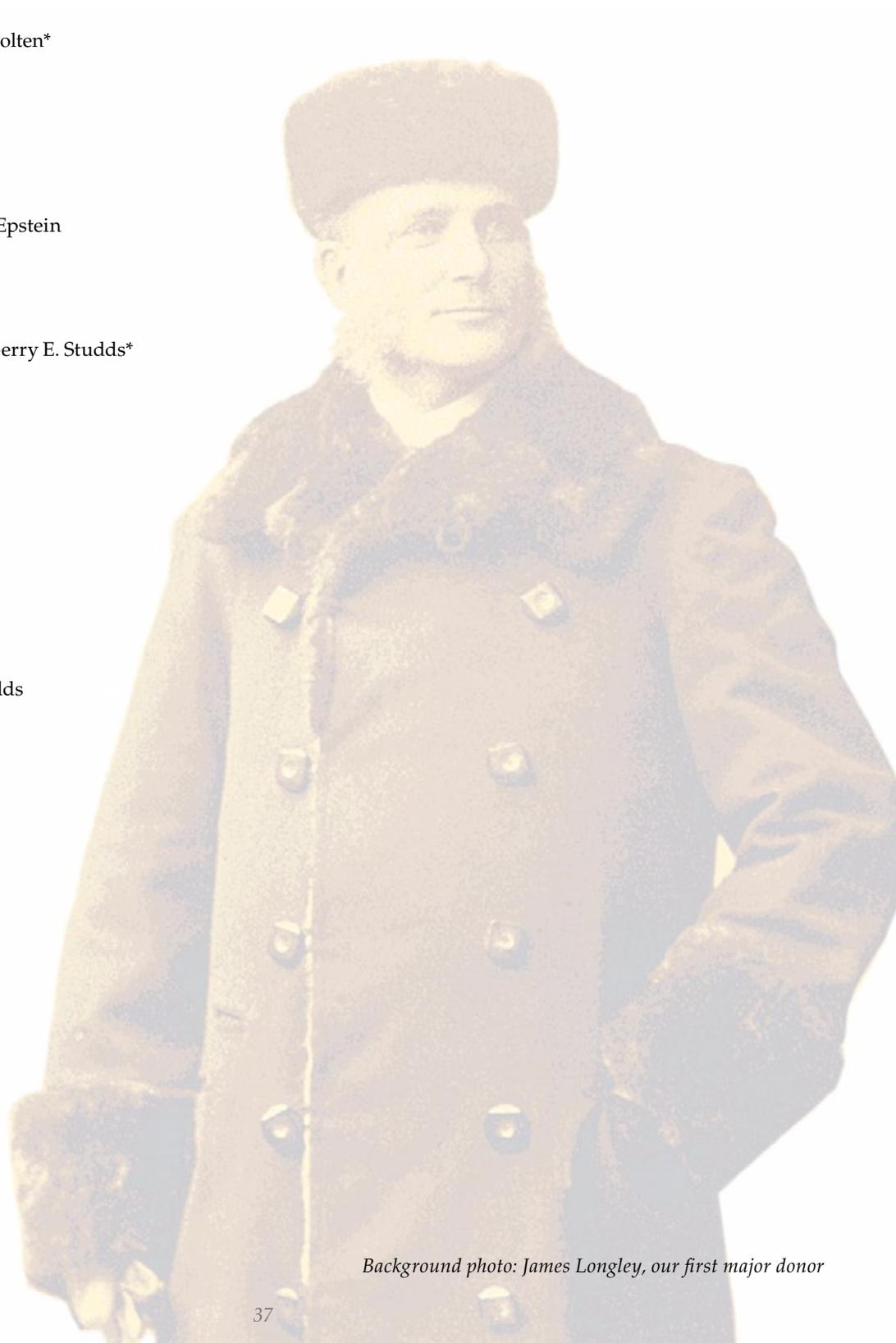
Anonymous (6)
Diane DeSerras Arenella
James F. Becker and Randal D. Rucker
Rick and Nonnie Burnes
Belden, Pamela, and Andrew Daniels
Richard and Marcia DeWolfe
Michael and Barbara Eisenson
David J. Elliott and Hungwah Yu
Grace and Edward Fey
Atsuko and Larry Fish
Peni Garber
Brian Hyde
Jane Wegscheider Hyman
Louis and Marcia Kamentsky
J. Dayne Lamb and Gardner N. Stratton
Edward J. LeMay
Anne R. Lovett and Stephen G. Woodsum
The McLachlan Family
Bill Nigreen and Kathleen McDermott
Robert A. and Veronica S. Petersen
Robert A. Radloff
Sam Plimpton and Wendy Shattuck
Joseph G. Prone Foundation
Lindsey A. Rosen
Dr. David and Mrs. Judith M. Schurgin
Sandra M. Stark
Mark and Grace Sullivan

LONGLEY LEGACY SOCIETY

The following donors have confirmed legacy commitments of up to \$999,999 to grow the Permanent Fund for Boston.

Anonymous (8)
Howard and Carol Anderson
Catherine Axon and Thomas M. Elder
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
Ellen Epstein and Rose* and Lee* Epstein
Paul and Patricia 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
Peter and Stephanie Kurzina
Colman & Carol Levin Fund
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
Jennifer P. and Daniel I. Sherman
Charles E. and Deana M. Shirley
Binkley and Paula Shorts
Scott E. Squillace, Esq.
Charles A. Walsh III
Ann and Hans Ziegler

*Deceased



Background photo: James Longley, our first major donor

ROGERSON LEGACY SOCIETY

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

Anonymous (38)
Mary Lee T. and Peter C. Aldrich
G. Thomas and Allison Aley
Barbara Jane Anderson
Geoffrey D. Austrian
Sherwood E. Bain
Mary Barber
Rich Becker
Laurie A. Bencal, CPA
Doreen B. Biebusch
Thomas W. Bird
David Blot
Kenneth S. Brock
Jacob F. and Barbara C. Brown
Rick and Nonnie Burnes
Margaret A. Bush
Frank and Ruth Butler
David and Gay Campbell
Helen T.W. Chen and Keith R. Ohmart
Stanley and Josephine Chen
Edward A. and Penny Cherubino
Arthur D. Clarke and
Susan P. Sloan
Marilyn Darling
David S. and
Shirley G.* Dayton
Ralph J. Donofrio
Malcolm Dunkley
Anita Maria Elliott

Ellen Epstein and Rose*
and Lee* Epstein
Joe Fiorello
Sandra and Philip* Gordon
Andrew C. Goresh
Dr. G. Anne Guenzel
Charlotte I. Hall
Marilyn L. Harris
Barbara Hauter Woodward
William G. Henderson and
Carol M. Brogna Henderson
Petie Hilsinger
Kenneth D. and Cynthia L. Holberger
Chuck Holland
Helen R. Homans
Emily C. Hood
Marjorie Howard-Jones
Stephen G. and
Rosemarie Torres Johnson
Karen A. Joyce and John Fitzgerald
Ruth G. Kahn
Louis and Marcia Kamentsky
Gary P. Kearney, M.D. and
Susan Kearney
James A. Kilmurray and
Janice L. Quiram
G. P. Paul Kowal
Barbara N. Kravitz
Virginia Kropas
Frances J. Lee-Vandell
Donald J. and Susan Kelley MacDonald
Robert and Poppy Mastrovita

Stephen J. McCarthy
Meredith and Elsa McKinney
The McLachlan Family
Rabbi Bernard H. Mehlman
Edward J. and Jane S. Michon
Charles Fessenden Morse
Frederick W. Neinas, M.D.
Carl H. Novotny and
Rev. Judith Swahnberg
Mark A. and Judith A. Osborne
Douglas D. and Geraldine Payne
Nancy E. Peace
Robert A. and Veronica S. Petersen
Warren Radtke and
Judith Lockhart Radtke
Chris Remmes
Richard L. Robbins
Edith M. Routier
John A. Russell
Wendy C. Sanford
Margaret Schmidt and Kenneth Danila
Norman J. and
Maryellen Sullivan Shachoy
Binkley and Paula Shorts
Ellen L. Simons
Edward G. (Ted) and
Nancy L. Smethurst
Cheryl H. Smith
Scott E. Squillace, Esq.
David F. and Patricia R. Squire
Arthur L. Stevenson
Anne B. Stone
Elihu and Bonnie Stone
Anne Thompson
Libby and Sidney Topol
Alan and Pamela Trefler
Joy E. Van Buskirk
Peter S. and Pamela L. Voss
Robert R. Wadsworth and
Catherine E. Moritz
J. H. Walton, Jr. and Carolyn Walton
Inge J. Wetzstein
Constance V. R. White
Eric S. and Linda H. White
Jeffrey and Theresa Whitehead
Michael N. and Mary M. Wood

**Deceased*

Background photo: Charles Rogerson, our founder

FUNDS

PERMANENT FUND FOR BOSTON

The Permanent Fund for Boston is Greater Boston's endowment and the most flexible fund held by the Boston Foundation, giving our staff and board members the crucial resources they need to respond to the most pressing issues facing our community at any point in time. It is made up of hundreds of separate funds that are either Unrestricted or Field of Interest Funds.

UNRESTRICTED FUNDS

The following funds are either totally unrestricted or directed to a general issue or area of concern. Many of these funds were established by families or organizations to honor loved ones or treasured colleagues by naming the fund after them. The year the fund was established is listed in parentheses.

Emily Tuckerman Allen Fund (2006)
Anonymous Fund X (2018)
Area IV Fund (2015)
Geno A. Ballotti Fund (1985)
Irene W. Bancroft Fund (1997)
James R. Bancroft Trust Fund (1985)
Harriett M. Bartlett Fund (1988)
J. E. Adrien Blais Fund I (1968)
The Barry Bluestone and Mary Ellen Colten Legacy Fund (2017)
Franklin S. & Cynthia B. Browning Fund (1989)
Frank B. & Watson G. Cutter Fund (1984)
James Dean Fund (1947)
Katherine E. Dooley Fund (1998)
Herbert and Lucy Fields Fund (2009)
Edward Glines Fund (1939)
Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2010)
Nathaniel Hooper Fund (1939)
Grace A. Jacobs Fund (1989)

Karoff Fund for Leadership in Philanthropy (2017)
Michael B. Keating Fund for Justice and Social Equity (2016)
Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2007)
Polaroid Fund (1997)
Ruth M. Reiss Memorial Fund (1997)
Samuel H. & Lizzie M. Robie Trust Fund (1983)
Walter J. & Marjorie B. Salmon Fund (1999)
Robert Wadsworth Fund for the Future of Boston (2008)

UNRESTRICTED FUNDS ANONYMOUS DONOR

A number of donors to the Boston Foundation wish to remain anonymous. In 2017, the Boston Foundation received a part of the transfer of a majority investment in a Massachusetts-based company. A substantial portion of the gift was directed to benefit the Permanent Fund for Boston, the Boston Foundation's endowment, which makes our strategic giving in Greater Boston possible. The donor, who wishes to remain anonymous, closely follows the work that the historic gift has made possible.

FIELD OF INTEREST FUNDS

The following funds are directed to a particular issue or area of concern. Many of these funds were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them. The year the fund was established is listed in parentheses and new funds are bolded.

Solomon Agoos Fund (1987)
Arts Fund (1998)
 Edith Allanbrook Fund (2003)
 Boston Parks Access Fund (2003)
 Free for All Endowment Fund (2014)
 Edward Hyde Cox Fund (2001)
 Anna Faith Jones Arts Fund (2001)
 MassDevelopment Arts Fund for Community and Economic Development (2003)
 Stephen and Sybil Stone Arts Fund (2003)
 Brother Thomas Fund (2008)
 Brooks White, Jr. Memorial Fund (2001)
Edith M. Ashley Fund (1961)
Asian Community Fund (2019)
Diane Heath Beever Memorial Fund (2008)
J. E. Adrien Blais Fund II (1968)
J. E. Adrien Blais Fund III (1968)
Emily Budd Fund (1961)
Business Equity Fund (2018)
Camping Associates of Roslindale & Milton Fund (1982)
Community Organizing & Advocacy Endowment Fund (1988)
Coolidge Christian Education Fund (1994)
Curtis International Council Fund (2000)
David W. Cushing Fund (1988)
DACA Dream Fund (2018)
Mabel Walsh Danforth Fund (1950)
Virginia Herrick Deknatel Fund for Children's Services (2002)
Major Arthur M. Diggles Foundation Fund (1993)
Annie S. Dillaway Fund (1966)
Kate Ellis Fund (1954)
Equality Fund (2012)
Mary C. Farr Arts Fund (2006)
The Flow Fund (2015)
Frederika Home Fund (1980)
General Support Fund for Education (1989)
Elizabeth D. Goldsmith Fund for Families (2011)
Hack.Diversity (2017)
Charles W. Hapgood Trust Fund (1987)
Harcourt Family Fund (2002)
Mary Harris Fund (1941)
Grace L. Holland Fund (2008)
Theodore C. Hollander Trust Fund (1929)
Jacoby Club of Boston Fund (1984)
Jamaica Plain Dispensary Fund (1963)
Charles Frederick Joy and Dora Marie Joy Fund (1993)
Vera Kilstein and Sarra Victorine Fund (2019)
King Boston (2018)
Kraft Family Non-Profit Emergency Fund (2016)
Louise P. Kush Fund (2016)
Edith Shedd Larsen Fund (1963)
Latino Legacy Fund (2012)
MAAH Stone Book Prize Fund (2019)
Maude A. MacNaught Fund (1980)
Azad & Doris Maranjian Charitable Trust Fund (2009)
Massachusetts Civic League Fund (1984)
Massachusetts United for Puerto Rico (2018)
Willis Munro Fund (1990)
Harry L. Nason Fund (1954)
Florence Arnaud Newton Fund (1956)
Grace G. North Fund (1955)
Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006)
Norman Everett Pearl Fund (1997)
Janet S. & George T.B. Perkins Fund (2000)
Petersen Family Fund for the Environment (2016)
Louise Phillips Bequest Fund (2003)
David R. Pokross Fund for Children in Need (1997)
Alice F. Rosenquist Fund (1985)
Fund for Self-Reliance (1989)
Louis Agassiz Shaw Fund (1992)
Katherine Dexter Shelman Fund (1955)
Arthur L. Sherin and Frances C. Sherin Fund (2003)
The Shout Syndicate Fund (2018)
Sophia Snow Fund (1949)
Helen & Marion Storr Fund (1986)
Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994)
Carroll J. Swan Memorial Fund for Children's Charities (1936)
Nelson E. Weeks Fund (1938)
Fanny Wharton Fund (1920)
Katherine C. Wheeler Fund (1988)
Fund for Preservation of Wildlife & Natural Areas (1994)
 Herbert Farnsworth Fund (1994)
 Hollis D. Leverett Memorial Fund (1994)
 Ruth and Henry Walter Fund (2011)
Arthur L. Williston and Irene S. Williston Trust For Education (1954)
Mary Denny Williston Fund (1970)
Window Shop Fund (1989)
Gladys W. Yetton Fund (1970)

DONOR ADVISED FUNDS

The Boston Foundation is proud to be a supportive partner to individuals, families and companies who utilize the Foundation's Donor Advised Fund program to pursue their own philanthropic interests and make a difference through charitable giving.

The year the fund was established is listed in parentheses and new funds are bolded. In addition to the 28 new Donor Advised Funds listed in bold, there were seven new anonymous Donor Advised Funds in fiscal year 2019.

3C Fund (2013)
63 Marlborough Street Fund (1985)
A & E Educational Quest Fund (2005)
AADS Memorial Fund (2005)
Walter and Alice Abrams Family Fund (2006)
Abromowitz/Ruttenberg Family Fund (2001)
Acacia Fund (2005)
Adler Family Fund (2006)
Adlib Foundation (2010)
Adopt-A-Statue Endowment Fund (1988)
Adopt-A-Statue Program - Bill Russell Legacy Project (2014)
Affinity Services Corporation Fund (2003)
The Akili Fund (2016)
James F. Alenson Memorial Fund (2007)
Aley Fund (2010)
Aliad Fund (1994)
Linowes Alinsky Philanthropic Fund (2018)
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1996)
George and Nedda Anders Fund (1992)
Barbara Jane Anderson Fund (2000)
Ashley Anderton Memorial Fund (2017)
Selma and Bayness Andrews Fund (2007)
Michael & Ellen Angino Fund (1998)
Anony Fund (1999)
Ansara Family Fund (2006)
Anthes Weitz Family Fund (2015)
Anthropologists' Fund for Urgent Anthropological Research (1996)
APOC Fund (2012)
Arba Lifnot Boker Fund (1993)
Arch Stanton Charitable Fund II (2016)
Armony Erel Charitable Fund (2009)

DONOR ADVISED FUNDS **DAVID MENDELS**

After meeting David Delmar Senties, the founder of Resilient Coders, David Mendels and his wife Leila Yassa began to support Resilient Coders through their Donor Advised Fund at the Boston Foundation.



Mendels was so inspired by Resilient Coders' mission of promoting social justice through economic empowerment, that he joined the board of the nonprofit, which trains young people of color who have an aptitude for technology as software engineers and then matches trainees to jobs in the high tech field.

DONOR ADVISED FUNDS
GAIL GOODMAN

Gail Goodman first heard about Entrepreneurship for All (EforAll), which helps under-resourced entrepreneurs launch new businesses, from another Boston Foundation donor, Desh Deshpande, who provided initial funding to the nonprofit in 2003 when it was launched in Lowell. Today Goodman supports EforAll through her family's Donor Advised Fund. She also chairs the board of EforAll, serves as a mentor to some of its entrepreneurs and is helping the Massachusetts-based nonprofit expand from mid-sized cities in the Commonwealth to Roxbury and cities in other states across the country.



Jennifer Winn Aronson Philanthropy Fund (2019)

- Atalaya Fund (2013)
- Atlantic Fund (1998)
- Ausschnitt Fund (2005)
- Victoria J. Avery Charitable Fund (2015)
- Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)
- Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
- Back Porch Fund (2015)
- Bagley Family Fund (2016)
- Bain Capital Relief Fund (2018)
- Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)
- M. Baldwin Family Fund (2016)
- John & Judith Barber Fund (2003)
- Richard Allan Barry Fund (2003)
- Hanna and James Bartlett Fund (2015)
- Baudanza Family Fund (1998)
- Baupost Group Charitable Fund (2004)
- Beachcomber Fund (2008)
- Belinda Fund (2011)
- Bellinger Fund (2008)
- Benjamin Foundation (2006)
- William D. & Mary E. Benjes Fund (1985)
- Jane Bernstein Fund (2006)
- Best Doctors Charitable Foundation (2011)
- Charlotte Saltonstall Bigham Memorial Fund (2005)
- Bird Fund (1999)
- Bill Bither Charitable Fund (2014)
- Bitpipe Legacy Fund (2005)

- Black Philanthropy Fund (2009)
- NICSA/William T. Blackwell Scholarship Fund (1995)
- Emmanuel and Jane Blitz Fund (1993)
- Blue Piano Fund (2018)
- Tom and Lisa Blumenthal Family Foundation (2006)
- Joan T. Bok Fund (1998)
- Bolze Family Fund (2013)
- The Bonomo Family Fund (2017)
- David Bor and Henrietta Barnes (2018)
- Boston City Hospital Social Service Fund (1981)
- BPE/Bank of Boston 200th Anniversary Fund (1983)
- Braverman Family Fund (1993)
- Bride-McEnany Fund for Empowering Women (2014)
- Bronner Charitable Foundation (2006)
- Brooke Family Donor Advised Fund (2008)
- Peter A. Brooke Fund (1999)
- Peter W. and Ruth H. Brooke Fund (2004)
- The Christine A. Brown Fund (2019)**
- Brumme Family Fund (2018)
- Buckman Fund (2011)
- Bill and Barbara Burgess Fund (2003)
- William T. Burgin Fund (2001)
- John A. Butler Memorial Fund (1989)
- Kairos Butler Fund (1994)
- Butler's Hole East (2012)
- Butler's Hole Fund (1995)
- Butler's Hole North (2012)
- Butler's Hole South (2012)

- The Byong Uk Chung Memorial Fund (2018)
- C & K Foundation Fund (2000)
- Norman L. Cahners Fund (1984)
- Campbell Foundation Fund (2003)
- A. Bruce Campbell Fund (2002)
- Krystle Campbell Memorial Fund (2013)
- James E. Canales and James C. McCann Fund (2018)
- Carbonite Charitable Fund (2018)
- Margaret W. Casey Fund (1987)
- John J. Cattaneo III Fund II (2017)
- Champa Charitable Foundation Fund (2003)
- Charlestown Benevolent Fund (2011)
- Charlestown Fund (2009)
- Chasin/Gilden Family Fund (2000)
- Charles Ezekiel and Jane Garfield Cheever Fund I & II (2006)
- Chelsea Community Fund (1998)
- Joyce Chen and Helen Chen Foundation Fund (1995)
- Cherry Stone Archives Fund (2011)
- Chertavian Family Fund (2006)
- The Mitchell D. Chester Memorial Fund (2018)
- Christ on Earth Fund (1989)
- Michael W. Christian Memorial Fund (1987)
- Dr. & Mrs. B.U. Chung Fund (2000)
- Chung Family Fund (2000)
- Churchill Family Fund (1997)
- Circle Fund (1998)
- Civic Engagement Fund (2011)
- CJE Foundation Fund (2007)
- Clark Family Fund (2011)
- Clementine Fund (2015)
- Coit Family Fund A (2002)
- Colby Charitable Fund (1981)
- Colin's Joy Project (2019)**
- Colony Road Fund (1997)
- Commonwealth Children's Fund (2018)
- Condor Street Fund (1989)
- Karen and Brian Conway Fund (2017)
- The Pat Cooke Fund (2016)
- Coolidge Family Fund (1982)
- Cooper Leeser Family Fund (1997)
- The Ann & Will Cordis Fund (2019)**
- Stephanie Dodson Cornell and James Cornell Family Foundation (2016)
- Corvelli Fund (1996)
- Constance and Lewis Counts Fund (1991)
- Demetrios G. C. & Kimberly A. Coupounas Fund (1997)
- George D., Angelyn K. & Demetrios G.C. Coupounas Fund (1995)
- Jessie B. Cox Charitable Trust Fund (2009)

Jessie B. Cox CLT - Cox Family Fund (2010)

Coxhead Family Foundation (2017)

Crane Fund (2012)

Joseph and Nancy Craven Family Fund (2014)

Cregan Charitable Fund (2005)

Crosby Family Fund (2000)

Kate Crozier Fund (2008)

Cuming Family Endowment Fund (1996)

Tarrant and Laura Cutler Charitable Gift Fund (2009)

John Da Silva Memorial Fund (1989)

Dainger Fund (1998)

Dammann Boston Fund (2004)

Lawrence B. and Elisabeth T. Damon Charitable Fund (2014)

Daniels Fund for Aspiring Boston Youth (2015)

Darling Family Fund (1983)

Kimberly Dawson Charitable Fund (2012)

John H. Deknatel Family Fund (2010)

Marshall and Laura Derby Charitable Fund (2008)

Rebecca Derby and Evan Morton (2008)

Sarah Derby and Gary MacDonald (2008)

DeWolfe Family Fund (2001)

Dibble Family Fund (2006)

Larry DiCara Fund (2006)

Dillon Fund (2005)

Dintersmith-Hazard Foundation Fund (2007)

Doe Noordzij Fund (2002)

Eugene B. & Nina L. Doggett Charitable Fund (2000)

Eric Dolinski & Kristen Ploetz Fund (2015)

Marthanne Dorminy Fund (2015)

Drane Center Fund (2002)

Douglas Drane Family Fund (1984)

Dretler Family Fund (2018)

Dryfoos Family Fund (2013)

William J. Ducas Charitable Fund (2012)

Bill and June Duggan Fund (2017)

Rebecca F. Duke Charitable Fund (2016)

Dupre-Nunnally Charitable Gift Fund (2007)

The Eagle Fund (2001)

Ecclesia Mission Fund (2013)

Edgerley Family Fund (2012)

Gregory J. Egan Donor Advised Fund (2019)

Egozy Fund (2007)

Eisenson Family Fund (2005)

Stephen J. Elledge (2017)

Elliott and Yu Education Fund (2012)

Ellis Family Fund (2003)

Elphaba Fund (2014)

Elpus Family Fund (2015)

Elving-Carr Family Fund (2016)

Employment Retention Fund (2004)

English Family Gift Fund (2019)

Ethics Trust Fund (1994)

Evans Family Fund (2000)

Connor Evans Fund (2018)

Norris & Constance Evans Charitable Fund (2000)

Taylor Evans Fund (2018)

The Ewing Family Fund (2014)

Faber Daeufer & Itrato Fellowship Program (2017)

Peter and Ellen Fallon Fund (1998)

The Farlovia Fund (2017)

Steven D.H. Farrell Fund (2013)

Carol Fazio Charitable Fund (2011)

First Principle Fund (2006)

Fish Family Fund (2010)

Fishreys Family Philanthropic Fund (2000)

Jack Florey Fund (2005)

Flower Hill Fund (2012)

Foote-Richards Family Foundation (2014)

Footpath Fund (2019)

Forshey Family Fund (1998)

James & Audrey Foster Charitable Foundation (2018)

Free for All Concert Fund (2011)

Niki & Alan Friedberg Fund (1987)

The Linda Friedman Memorial Fund (2018)

Fulkerson Family Fund (1999)

Lyle W. Fulkerson Fund (1999)

Sarah Fulkerson and Robert Le Roy Family Fund (1999)

Fuller Trust, Inc. Fund (2010)

Future Fund (2006)

Gabrieli Family Fund (1998)

Galilean Fund (2008)

Ganesh Fund (2002)

Gannon Family Charitable Fund (2004)

Gannon Family S.U.N. Fund (2010)

John Lowell Gardner Fund (1987)

Garuda Fund (2008)

Brad Gatlin Family Fund (1996)

Gaudette Family Fund (2000)

Gergen Family Fund (2010)

Gilbert Fund (2008)

Ginsberg/Kaplan Fund (2011)

Giudice Family Fund (2012)

Glassman Gale Family Fund (1985)

Carol R. & Avram J. Goldberg Fund (1984)

John & Ethel Goldberg Fund II (1984)

Golden Family Fund (2001)

Goldstein-Allen Fund (2019)

Peter G. Gombosi Memorial Fund for Autism Research and Services (2006)

The Goodman-Swindell Family Foundation (2015)

Goodworks Fund (2003)

Gordon Educational Fund (2002)

Gordon Place Charitable Fund (2012)

Sandra & Philip Gordon Family Foundation Fund (2002)

Laurie Gould and Stephen Ansolabehere Fund (2010)

Gravelley Springs Fund (2006)

Green Fund (2011)

Greenhill Family Charitable Fund (2014)

Grogan Fund (2012)

Elizabeth and Phillip Gross Family Foundation (2015)

Patricia H. Gross Fund (2000)

Grunebaum Charitable Fund (2007)

Gualala Fund (1991)

Guenzel-Pieters Family Fund (2009)

Charles & Dorothy Gullickson Fund for Social Change (1999)

Jay Habegger and Christine Nagle Fund (2005)

Belle Linda Halpern Family Fund (2013)

The Kathryn Hannigan Fund (2019)

The Matthew J. Hannigan Fund (2019)

Ken and Becky Hansberry Fund (2001)

J. Allan Hauter Memorial Fund (2004)

Hebb Charitable Fund (2004)

HEIRS Fund (1997)

Henderson Fund (1997)

The Hesperia Fund (2016)

Hewitt Family Charitable Trust Fund (1994)

The Hidden Garden Fund (2016)

Hidden History Fund (2017)

Higgins Endowed Fund (2012)

Higgins Family Fund (2014)

Ann S. Higgins Fund (2002)

Hildreth Stewart Fund (2013)

Joanne K. Hilferty Fund (2017)

Lucius T. Hill III and Wendy Y. Hill Fund (2001)

Petie Hilsinger Fund (2000)

Marc Hirschmann Foundation Fund (2002)

Hoffman Fund (1987)

Holberger Family Fund (1994)

Holland Family Fund (1994)

Emily C. Hood Fund (2012)

Gilbert H. Hood Family Fund (1981)

Robert Hooper Family Fund (2005)

The Hot Chocolate Fund (2018)

Hourless Fund (1998)

Hamblin L. Hovey Institute Fund (1983)
 Hoyt Family Fund (2001)
 Hunt Fund for Charlestown Children (2002)
 Brian R. Hyde Foundation (2018)
 Income Research and Management Charitable Fund (2014)
 Interstitial Fund (2010)
 The Irza-Leggat Family Charitable Gift Fund (2018)
 J. Jill Compassion Fund (2002)
 Mitchell & Diane Jacobs Fund (1999)
 Jade Fund (2008)
 JAHHELBE Fund (2002)
 Hope and David Jeffrey Fund (2012)
 Jewel Family Fund (2017)
 Jochkan Charitable Fund (2002)
 Julia and Peter Johannsen Charitable Fund (2016)
 Stephen G. & Rosemarie Torres Johnson Family Fund (2000)
 Jonas Family Fund (2000)
 Hubie Jones Fund (2004)
 Samuel Lamar Jordan Trust Fund (2001)
 The Joy Fund (2017)
 Jumping Rock Fund (2001)
 Louis and Marcia Kamensky Donor Advised Fund (2010)
 Albert J. & Diane E. Kaneb Family Fund II (1997)
 Beton M. Kaneb Fund (1984)
 Martin & Wendy Kaplan Fund (2007)
 Kaplan-Barletta Family Fund (2018)
 Kassler Family Fund (2000)
 Kaufer Family Charitable Giving Fund (2005)
 Kaye Charitable Fund (2004)
 John & Anne-Marie Keane Foundation Fund (1998)
 Keewaydin Fund (2002)
 Sabina F. Kelly Catholic Charitable Fund (1992)
 Kensington Capital Children's Fund (2002)
 Keogh Family Fund (2001)
 Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
 Kidder Smith Fund (2003)
 M. R. Kidder Charitable Fund (2005)
 The Caren and Tom Kilgore Charitable Trust (2016)
 Kindling Fund (2012)
 Bert King Fund (2016)
 John Thomas Kittredge and Charles R. Morehead Fund (2011)
 KJN Family Fund (1998)
 Kluchman Family Fund (1997)
 Allen and Elizabeth Kluchman Fund (1997)
 Klureza Family Fund (1997)
 Knox Family Fund (2018)
 Pamela Kohlberg Fund (1995)
 Stephen P. Koster Fund (1986)
 Ronni Sachs Kotler Family Fund (2007)
 Roger and Lisa Krakoff Foundation (2018)
 Kravitz Family Fund (1994)
 Krivickas Family Fund (2007)
 Paul and Mimi La Camera Charitable Fund (2018)
 Gregory and Deborah Laham Family Charitable Fund (2011)
 Lisa and William Lahey Fund (2017)
 Jay R. and Carol B. LaMarche Family Charitable Trust (2013)
 LandsEnd Charitable Fund (2018)
 LandWave Fund (2010)
 Lash Family Charitable Fund (2014)
 Lorin A. Lavidor and Eric E. Berman Charitable Fund (2006)
 The J. & S. Lawrence Family Fund (2018)
 Leading By Example Fund (2015)
 Barbara Lee Family Foundation Fund (2004)
 Paul and Mary Lee Fund (2014)
 Roger & Clarissa Lee Family Fund (2010)
 Thomas E. & Barbara B. Leggat Fund (1987)
 Jo-Ann and Martin Leinwand Fund (1987)
Edward J. LeMay Fund (2019)
 Colman & Carol Levin Fund II (2017)
 The Karen and Howard Levine Family Fund (2004)
 Levitt Family Fund (2001)
 Light-Curtin Fund (2017)
 John S. Llewellyn, Jr. Community Assistance Fund (1997)
 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 (2001)
LogMeIn Charitable Fund (2019)
 Longfield Family Foundation (2012)
 Loomis Sayles Charitable Fund (2008)
 Lord-Buck Fund (1996)
 Bruce Lunder Fund (1983)
 John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
 Donald J. & S. Kelley MacDonald Charitable Fund (1999)
 Magic Penny Fund (1998)
 Mahoney Family Fund (1984)
 Mann Family Fund (2011)
 Margolin/Rushford Charitable Fund (2015)
 William G. Markos Fund (1983)
 Evelyn A. Marran Fund (1984)
Marston Family Fund (2019)
 Martin Fund (1998)
Kumi & Bill Martin Foundation (2019)
 Mason-Brown Fund (2008)
 Match School Scholarship Fund (2008)
 Joan S. Mathews Charitable Fund (2015)
Karen Mauney-Brodek Fund (2019)
 Eric and Sue May Charitable Fund (2012)
 May-McClain Charitable Gift Fund (2012)
 Mayel Fund (1982)
 Austin and Tiverton McClintock Gift Fund (2014)
 Alice L. McDougall Donor Advised Fund (2015)
 Richard & Judith McGinnis Fund (2000)
 McNeill Family Foundation (1998)
 McSweeney Family Charitable Fund (2010)
 Medical Research Fund (1993)
 Emily & Bernard H. Mehlman Fund (2003)
 Melendez & Beauchamp Family Fund (2018)
 Mellowes Fund (1998)
 Thomas M. Menino Fund for Boston (2014)
 Gilbert G. Menna Family Fund (1999)
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1999)
 Meyer Foundation (2007)
 Allan Meyers Fund for the Advancement of Careers in Disability (2001)
 Michon Family Fund (1987)
 Microsoft Unlimited Potential Fund (2005)
 Mid-Century Fund (2005)
 J. F. Middleton Family Fund (1996)
 Milford Street Fund (2015)
 Mill River Foundation Fund (2004)
 Gabrielle J. Miller Donor Advised Fund (2005)
 The Mills Family Charitable Fund (2017)
 Mimecast Charitable Fund (2018)
 Anita L. Mishler Education Fund (1984)
The Mission Fund (2019)
 Moccasin Brook Fund (2000)
 The Modi Family Pass The Luck Foundation (2012)
 Molino Family Fund (2004)
 Monadnock Fund (2002)
 Mormann Family Fund (2007)
 Andy Morris and Lynne Salkin Morris Family Fund (2012)
 Robert S. Morris Advised Fund (2001)
 Sykes Moyer Fund (2005)

Muddy Pond Trust Fund (1994)
 Munger Family Fund (2002)
 Bob & Alison Murchison Fund (2014)
 Murphy Family Fund (2014)
 The Murray Family Fund (2017)
 Musicus (2018)
 Mussafer Family Fund (2014)
 Myrtle Field Fund (2005)
 Mystic Harmony Fund (2001)
 Mystic River Watershed Environmental Fund (2012)
 Paul and Kathleen Nagle Family Fund (2007)
 Leslie & Sandra Nanberg Charitable Foundation Fund (2002)
 Tami E. Nason Fund (2005)
 NE500/501Circle (2016)
 NEID Climate Change Giving Circle Fund (2018)
 NEID Giving Circle (2017)
 New Beginnings/Kidder Fund (2005)
 New England Temperature Solutions (2014)
 New Place (2018)
 Next Door Fund (2006)
 Nichols Foundation (2017)
 Nichols Foundation West (2017)
 Joan Nichols Family Fund (2017)
 The Nichols Philanthropy Fund (2017)
 William H. Nichols Fund (2017)
 Nixin Foundation (2018)
 North Conway Institute Fund (2001)
 Chad & Lia Novotny Fund (2002)
 Kathryn Novotny Fund (2007)
 Nicholas Novotny Fund (2007)
 Novotny/Ramirez Donor Advised Fund (2002)
 Novotny/Swahnberg Fund (1998)
 O'Brien Family Fund (2007)
 Barbara Rose O'Connor Charitable Fund (2018)
Vania K.E. O'Connor Fund (2019)
 One Foot Plan (2015)
 Orchard Hill Fund (2013)
The Oristaglio Foundation (2019)
 Orpheus Fund (2003)
 E. Ostroff Fund for Service (2017)
 Owen Marie Fund (2013)
 Palmer Family Fund (2016)
 Morgan Palmer Foundation (1982)
 John J. Pappenheimer Fund (1995)
Parachute Fund (2019)
 The Park Family Charitable Fund (2014)
 Parker Family Fund (2001)
 Field Parker Fund (1997)
 Partnership Fund in honor of Anna Faith Jones (2001)
 Alfred Nash Patterson Foundation for the Choral Arts Fund (1980)

Payne's Creek Fund (2002)
 Payson Family Fund (2001)
 Peaceable Kingdom Fund (1998)
 Perkins Improvements Fund - William (1996)
 John A. Perkins, Jr. Fund (2001)
 Robert C. Perkins Fund (2001)
 Samuel Perkins and Nancy Reed Fund (1996)
 Sheila and Sara Perkins Fund (1996)
 Peter Fund (2001)
 Petersen Family Fund (2002)
 Philancon Fund (1990)
 Katherine A. & Fannie Phillips Fund (1997)
 Picard Family Fund (2000)
 Jamie Pierce & Rick Cresswell Fund (2003)
 Karen Odessa Piper Charitable Gift Fund (2014)
 Plimpton - Shattuck Fund (2006)
 Pluhar Family Fund (2014)
 Renata Poggioli Fund (1992)
 The Poler Family Foundation (2009)
 Pool Family Fund (1998)
Poorvu Jaffe Family Fund (2019)
 Poss-Kapor Family Fund (1996)
 Helen C. Powell Donor Advised Fund (2015)
 Pride in Scholarship Fund (1993)
 Primary Care Progress Fund (2012)
 Thomas & Mary Prince Family Fund (2001)

Joseph G. Prone Foundation (2014)
 Sue and Bernie Pucker Fund (2003)
 Donald and Frances Putnoi Charitable Fund (2007)
 Peg Pyne Fund for Handicapped Access (1986)
 Quid Nunc Fund (2002)
 Sidney R. & Esther V. Rabb Family Fund (1984)
 Barbara & Yale Rabin Fund (2002)
 Radtke Family Fund (1997)
 Otto W. Ramstad Fund (1999)
 Phyllis and Jerome Lyle Rappaport Fund (2016)
 Bessye Bedrick Ravelson Fund (2003)
Ravichandran Foundation (2019)
 Gene Record Fund (2002)
 Sara Delano Redmond Fund (1996)
The Reidy/Andre Fund (2019)
 Remmer-Fox Family Fund (1996)
 Reno Family Charitable Foundation (1999)
 Edward S. Reynolds Memorial Fund (1985)
 Rhyme and Reason Fund (2001)
 Roberts Family Fund (1996)
 Roberts-Belove Fund (2005)
 Robynhood Thanksgiving Fund (2003)
 Rosedune Fund (1971)
 Rosen Family Fund (2008)
 Lindsey A. Rosen Fund (2011)
 Rossiter Family Fund (2018)

DONOR ADVISED FUNDS **MIMECAST**

Mimecast Co-Founder and CEO Peter Bauer has built corporate social responsibility into the organization's culture from the start. He established the Mimecast Charitable Fund as a Donor Advised Fund at the Boston Foundation to support nonprofits in the U.S., U.K. and Australia. The cybersecurity company has developed a strong relationship with the nonprofit organization Year Up for which the Boston Foundation was "there at the beginning" with one of its first grants. Together they will develop a workforce development program to annually serve 160 young adults—who are currently shut out of viable career and higher education opportunities.



Daniel and Brooke Roth Charitable Gift Fund (2008)
 Rothman Charitable Fund (2014)
 Rotman-Attardo Family Fund (2006)
 Rust Bowl Fund (1988)
 Saffron Circle Fund (2006)
 David Salten Fund (2008)
 Samuelson Family Gift Fund (2013)
 Risha C. and Paul A. Samuelson Fund (1982)
 Sands Family Fund (2012)
 Susan F. Schaeffer Fund (2014)
 Schawbel Family Fund (1995)
 Margaret M. Schmidt and Kenneth J. Danila Fund (2005)
 Schott Fund (1999)
 Schumann Family Fund (2005)
 Joel Schwartz Family Fund (2001)
 Schwinn Family Charitable Foundation (2011)
 Charles S. and Zena A. Scimeca Charitable Fund (2004)
 September Fund (2001)
 A Servant's Heart (2014)
 Norman and Maryellen Sullivan Shachoy Fund (1998)
 Shames/Egasti Fund (1992)
 Shapiro/Fleishman Fund (2000)
 Douglas Boyd Sharpe Donor Advised Fund (2007)
 Shawkemo Fund (2001)
 SheGives Fund (2015)
 Bob and Jean Sheridan Family Fund (2013)
 Sherman Family Foundation Fund (2005)
 Jon Shevell Cancer Fund (2011)
 Jon Shevell Children's Fund (2011)
 Jon Shevell Education Fund (2011)
 Shoe Box Foundation Fund (2004)
 Peter Sidewater Foundation (2017)
 Jean Karpas Siegel Fund (1995)
 Silvia-Chandley Fund (2014)
 John and Susan Simon Boston Foundation Fund (2007)
 Ellen L. Simons Fund (1998)
 Sixty-Nine Roses Charitable Foundation (2011)
 Skylight Fund (2000)
 Fay Slover Fund (2011)
 Ellin Smalley Fund (1988)
 Austin & Susan Smith Fund (2000)
 Clark R. and Trina H. Smith Family Fund (1991)
 Anna and Jack Sommers Family Gift Fund (2018)
 Nancy and George Soule Family Fund (1998)
 Sparky Foundation Fund (2004)
The Sparsh Foundation (2019)
 Spector Fund (2002)
 Spencer Family Charitable Fund (2015)
 David F. Squire Family Fund (1998)
 Harvey & Shirley Stein Fund (2000)
 Stewart Fund (2006)
 Tracy Stewart Fund (2009)
Jim Stiles & Randy Bird Charitable Trust (2019)
 Stith Hope Fund (2015)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 James M. and Cathleen D. Stone Family Foundation (1996)
 Congressman Gerry E. Studds Fund (2007)
 Charles Sugnet Fund (1999)
 Joshua Sugnet Fund (1999)
 Suhrbier Family Fund (2006)
 Nancy L. Sullivan Fund (1990)
 Diane Sullivan-Villano Fund (1998)
 Sunrise Fund (1993)
 Sylvan Fund (1986)
TAF Device (2019)
 TechFoundation Fund (2003)
 Tempero Family Fund (2003)
Ann Theodore Foundation (2019)
The Third Base Fund (2019)
 Marc Thompson & Maureen Conway Family Fund (2008)
 Thomsen Family Fund (2001)
 Susan and Michael Thonis Fund (2005)
 Scott and Jennifer Tobin Charitable Fund (2005)
 Toms Family Fund (2016)
 Topol Family Fund (1991)
 Trefler Fund (1997)
 Tusk Montgomery Charitable Giving Fund (2018)
 The Tuukka Rask Foundation (2014)
 Tye Charitable Fund (2007)
Upper Mill Fund (2019)
 Joseph Bishop Van Sciver Fund (1861-1943) (1998)
 Nancy J. Vickers Fund (2007)
 Marlyn and Richard Victor Fund (2017)
 Violet Iris Fund (2015)
 Ann & Robert von der Lippe Fund (1998)
 James and Margaret Wade Fund (1997)
 JH & EV Wade Fund (1991)
 Linda M. Walczak Children's Literacy Fund (2016)
 Waldron Charitable Fund (2018)
 Walker Fund (1999)
 The Walter/Capone Fund (2011)
 Ruth and Henry Walter Fund I, II, & III (2011)
 J. H. Walton Family Fund (1987)
 Mitchell and Barbara Freedman Wand Charitable Fund (2014)
 Warner Charitable Gift Fund (2000)
 Anita Barker Weeks Charitable Gift Fund (2012)
 Gordon Weil, Jr. Fund (2010)
 Weiss Charitable Fund (2005)
 Wellesley Hills Congregational Church Outreach Fund (2007)
 Janet White Memorial Scholarship Fund (2004)
 Whitehead - Sayare Fund (2008)
 Guy and Maggie Wickwire Fund (1990)
 James and Debra Wiess Fund (2013)
 Benjamin J. Williams, Jr. Fund (1987)
 Hope A. Williams Fund (1987)
 Natica R. Williams Fund (1987)
 Ralph B. & Margaret C. Williams Fund (1985)
 Ralph B. Williams, II Fund (1987)
 Williamson Charitable Fund (2016)
 The Windy West Fund (2016)
 Winkler Family Foundation Fund (2001)
 Winn Family Charitable Fund (2016)
 Wesley L. Winship Fund (1999)
 Winsor Foundation Fund (1989)
 Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 Michael N. Wood Fund (1997)
 Christopher and Debra Wysopal Charitable Trust (2018)
 Leila Yassa & David Mendels Fund (2001)
 YotMe Donor Advised Fund (2018)
 Zabin Charitable Fund (2001)
 Emily Zofnass Fund (1998)
 T. Zouikin Charitable Fund (2004)
 Zug Family Fund (2009)
 Zwanziger Fund (2007)
 The Zwanziger-Hoffman Fund (2018)

SUPPORT ORGANIZATIONS

Support Organizations have the continuing involvement of their founders, yet maintain public charity status through their affiliation with the Boston Foundation. The year the fund was established is listed in parentheses.

Bruce J. Anderson Foundation (1981)
Deshpande Foundation (2007)
Horace Moses Foundation (1995) to support Junior Achievement
James M. and Cathleen D. Stone Family Foundation (1995)

SCHOLARSHIP FUNDS

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

The Laura Ahlbeck Memorial Scholarship Fund (2017)
Harry Ankeles Scholarship Fund (1993)
Benjamin Foundation Scholarship Program (2017)
Blair Family AvalonBay College Scholarship (2013)
George C. Brackett STEM Scholarship (2016)
Francis J. Bresnahan Educational Scholarship Fund (1987)
Alex Castoldi Memorial Scholarship Fund (1982)
The Cicolani Family Scholarship Fund (2018)
Paula Marie Danforth Memorial Scholarship Fund (1990)
deVille Fund (1995)
Eagle Bank-Frank E. Woodward Scholarship Fund (1986)
Americo J. Francisco Scholarship Fund (1994)
Albert Francis Gilmartin Memorial Scholarship Fund (2005)
Gladwood Scholarships (2018)
Robert L. Gould Fund (1988)
Charles Hammond Fund - Hanover (1972)
Charles Hammond Fund - Springfield (1972)
Janey Fund Scholarship Program (1999)
Manton Scholars (2017)
MFG Scholars Program (2019)
Nixon Peabody Scholarship Program in Recognition of Retired Managing Partners
Robert S. Cummings, Nestor M. Nicholas, and Harry P. Truheart, III (1998)
Stephen D. Paine Scholarship Fund (1999)
Prilla Smith Brackett Award (2018)
Francis P. Sears Scholarship Fund (1974)
Waldron-Wayland Scholarship Fund (2019)
Paul & Eleanor Young Fund (1989)
Youth Business Institute Scholarship (2014)

DESIGNATED FUNDS

Designated Funds have been established to support specific, named organizations. Through these funds, many nonprofit institutions receive crucial annual support.

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

ACCESS Education Fund (1985)	Boston Ballet - E. Virginia Williams Endowment Fund (1984)	Charles T. Burke Fund for the Watertown Boys and Girls Club (1995)
Fund for Adult Literacy (1985)	Boston Bar Association Endowment Fund (1984)	Charles T. Burke Fund for the Watertown Free Public Library (1995)
Rae and Aaron Alberts Foundation Fund (2003)	Boston Baroque Fund (2004)	Agnes T. Carruth Fund (1984)
Rae and Aaron Alberts Foundation Fund II (2005)	Boston Debate League Endowment Fund (2018)	James F. Casey Fund (1950)
Ames, IA Public Library Large Print Endowment Fund (2018)	Boston Medical Center Services Fund (2018)	Dr. Walter Channing Memorial Fund (1934)
Frank E. Anderson Fund (1976)	Boston Schoolyard Funders Collaborative (1996)	Charles River Parklands Stewardship Fund (2002)
Artists Foundation Endowment Fund (1984)	Boston University School of Education Fund (2018)	Philip P. Chase Fund (1956)
Red Auerbach Youth Foundation Fund (1983)	Richard L. Bowser Fund (1985)	Julia Child Fund (1980)
The Helena and Alfred Barthel "Peace on Earth" Endowment (2017)	BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)	Ellen D. Cholerton Fund (1970)
Lilian G. Bates Fund (1952)	BPE/Support for Early Educational Development Fund (1986)	Arthur G. Chute and Nordice Chute Family Legacy (2018)
Bedford, MA Public Library Large Print Endowment Fund (2018)	Herbert Brandshaft Scholarship Fund (2008)	Ernest & Vera Clivio Charitable Memorial Fund (1982)
Grace & Floyd Lee Bell Fund (1988)	Annie L. Breckenridge Trust Fund (2000)	Committee to Light Commonwealth Avenue Fund (2012)
Lisa and Tom Blumenthal Artistic Innovation Fund (2018)	Brookline Youth Concerts Fund (1995)	Concord, MA Public Library Large Print Endowment Fund (2018)
	Michael and Stella Buonsanto Charitable Fund (2013)	Almon B. Cook - Relief Fund (2001)
		Allyn Cox Fund for Essex County Greenbelt (1994)
		Thomas G. Curtin - Bobby Kargula Nanae Fund (2010)
		Dedham Choral Society Endowment Fund (1992)
		Harry Ellis Dickson Youth Concerts Fund (1982)
		Joy & George Dryfoos Charitable Fund (2013)
		Duggan Charity Fund (1999)
		East Boston Social Centers, Inc. Fund (1997)
		Douglas A. Eaton Memorial Fund (1963)
		William V. Ellis Fund for Our Lady of Good Voyage Carillon (2012)
		Ruby C. Emerson Fund (1967)
		English High School Class of 1934 Award Fund (1995)
		The English High School - John P. Murphy Scholarship Fund (1996)
		Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2009)

DESIGNATED FUNDS

VILLA VICTORIA CENTER FOR THE ARTS

Originally named after a former executive director, Inquilinos Boricuas en

Acción (IBA) opened the Jorge Hernández Cultural Center (now

Villa Victoria Center for the Arts) in 1986 to act as a vibrant

community gathering place. Hosting musical, literary,

artistic and theatrical performances predominantly led

by Latino artists, Villa Victoria Center for the Arts

welcomes community members of all income levels to

enjoy the creativity of local and international Latino

culture. The Boston Foundation was "there at the

beginning" for IBA when it was founded in 1970.



Philip M. Fagan Family Fund (1972)
Paul R. & Jacqueline D. Fehrenbach Family Fund (2000)
Benjamin M. Feinberg Fund (1963)
Arthur Fiedler Esplanade Concerts Fund (1980)
Mark Hayden Fineman Chess Tournament Fund (1985)
Food and Fuel Fund (2009)
Felix Fox Memorial Fund (1975)
Americo Francisco Fund, Estate & Realty/Charitable Trusts (1999)
Peter Marshall French Memorial Fund (1977)
The Linda Friedman Memorial Fund (2017)
Gaywest Farm Fund (1994)
Agnes A. Gidley Memorial Fund (2014)
John & Ethel Goldberg Fund I (1984)
John & Ethel Goldberg Fund IV (1985)
John & Ethel Goldberg Fund V (1985)
John & Ethel Goldberg Fund VI (1985)
Bessie P. Goldsmith Fund (1994)
Barbara W. & Frank B. Gopen Fund (1979)
Walter W. Gove Fund (1973)
The GranCommunity Fund (2019)
Elizabeth Grant Fund (1981)
Greatrex Scholarship Fund (1989)
Rosario Fajardo Hagan Fund (1991)
Haiti Development Institute Fund (2016)
Patricia Jellinek Hallowell Fund (1993)
Hastings-Plummer Fund (1941)
Jorge N. Hernandez Fund (1988)
Gertrude Hooper Fund (1997)
Madeleine C. Huiginn Fund (1993)
Blanche Hyslop Fund (1983)
Orchestra of Indian Hill Music Director Fund (2003)
James W. & Margaret A. Ingraham Charitable Fund (1992)
Inversant Fund (2018)
Ella Jackson Artists and Scholars Fund (1983)
Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2014)
Donaldson F. Jones Fund (2000)
Patrick F. Jones, Jr. Endowment Fund (1982)
William & Sean Kelley Scholarship Fund (2010)
John F. Kennedy Library Foundation Endowment Fund (1984)
Demetra Kenneth-Brown Fund (1921)
Alice V. Kidder Fund (2001)
Robert D. and Sally G. King Fund (2000)
Kit Clark Senior Services Fund (2000)
La Vida (2018)

Gerald V. Levreault & Claire H. Levreault Fund (2002)
Lawrence B. Lewis Fund (1958)
Lexington Arts & Crafts Endowment Fund (2018)
Lexington, MA Public Library Large Print Endowment Fund (2018)
Lincoln, MA Public Library Large Print Endowment Fund (2018)
Lionheart Foundation Endowment Fund (2018)
Ralph Lowell Fund (1983)
Gertrude F. & Henry L. Maurer Fund (1999)
John S. McCann Fund (2000)
MHEAC Fund for ACCESS (1987)
Dorothy Morse Endowment Fund (2000)
Harry D. Neary Fund (1951)
Neighborhood Preservation Initiative Fund (1995)
New England Aquarium Education Fund (1984)
New England Forestry Foundation Fund (1997)
New England Women's Club Fund (2002)
Next Steps Fund (2017)
Roger L. Nichols Internship Program Fund (1985)
William H. Nichols Fund For Chemistry (2017)
Noonan Scholars Endowment Fund (2018)
Lottie S. Page Fund (1985)
Robert Treat Paine Historical Trust Fund (1991)
Palazzo San Gervasio Library Fund (1995)
William Morgan Palmer Fund (1978)
Harold Peabody Memorial Fund (1993)
Permanent Fund for Vocational Education (1979)
John M. Pero Scholarship Fund (2015)
Charles & Cornelia Pfaff Fund (1965)
Henry L. Pierce Fund (1959)
Emma K. & Richard Pigeon Fund (1956)
The Plimpton-Poorvu Design Prize Fund (2015)
Pozen Prize for Innovative Schools (2014)
Primary Care Fellowship Program Fund (1983)
Public School Management Research Fund (2003)
Charlotte F. & Irving W. Rabb Family Fund (1985)
Reading Visiting Nurse Association Fund (1977)
Rockport Music Fund (2018)
Rogers Fund of the Riverside Cemetery (1998)

Henry A. Root Fund (1927)
Rose Fund (1982)
Roxbury Community College (2018)
Dr. Jordan S. Ruboy Charitable Fund (2014)
Sheep Pasture Fund (1994)
Bessie H. Short Fund (1997)
Dana P. & Maude E. Simpson Memorial Fund (1999)
Muriel & Otto Snowden Endowment Fund (1985)
Social Law Library Endowment Fund (1982)
Michael Spock Community Service Fund (1981)
Alison L. Stevens Fund (1977)
Eva and William Stillman Scholarship Fund (2014)
Miriam & Sidney Stoneman Fund (1984)
Surfmen's Trust Fund (1978)
Agnes & Lewis Taylor Fund (1963)
Frank B. Thayer Fund (1977)
Pauline Toumpouras Fund (2010)
Tsuda College Fund (2018)
David J. Tuttle, Jr. ALS Fund (2016)
David J. Tuttle, Jr. MIT Fund (2016)
United Way Millennium Fund for Children and Families (2000)
Ansin Fund (2003)
Chelsea Boys and Girls Club Fund (2001)
Connell Family Fund (2001)
Carol R. & Avram J. Goldberg Fund (2002)
Lawrence & Beth Greenberg Fund (2001)
Darlene & Jerry Jordan Fund for Children (2000)
Margarete McNeice Fund (2001)
David R. and Muriel K. Pokross Fund (2004)
Schoen Family Fund (2000)
Tom & Nancy Shepherd Fund (2001)
State Street Foundation Fund (2001)
J.C. Tempel Fund for Children (2001)
Vinik Family Fund (2001)
Peter and Pamela Voss Fund (2001)
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 (1980)
Stetson Witcher Fund (1987)
Wiener Fund (2009)
May J. Wikstrom Fund (1999)
Rudolph & Sara Wyner Prize Fund (1986)

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The Boston Foundation works closely with professional advisors in the Greater Boston area to support them and their clients in all aspects of philanthropic giving. We would like to acknowledge the contributions of our Professional Advisor Committee and Professional Advisor Network, who together with Boston Foundation staff advocate for the value of philanthropy and examine innovative mechanisms for high impact charitable planning.

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**PAN Co-Chair, FY2019*

***PAN Co-Chair, FY2020*

BECOMING A DONOR

The Boston Foundation has a close partnership with our donors—individuals, families, executives and entrepreneurs—who seek a platform for their charitable giving because, like them, we measure philanthropy by impact created, not just dollars given.

Supporting Systemic Change Through Civic Leadership

By working with the Boston Foundation, you become an important part of a dynamic community of problem solvers. Through research, forums and policy leadership, the Boston Foundation has helped to leverage hundreds of millions of dollars in federal and state funds, restructure our community college system, provide crucial state funds for cultural facilities and inform groundbreaking criminal justice legislation. This work is supported by the Annual Campaign for Civic Leadership, to which more than 500 generous donors contributed last year.

Helping You Shape Your Legacy

You don't need millions to leave a legacy gift and make a lasting impact on the world. Through careful estate and succession planning, funds of any size can create a lasting legacy while helping you realize financial and tax benefits. Your legacy gift to the Permanent Fund for Boston will support the most pressing issues of the day, whatever those issues may be decades or centuries into the future. There are many ways to accomplish your goals, and we look to be your partner in this work.

Streamlining Your Philanthropy Through a Donor Advised Fund

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 will work with you to make it happen. For more than 30 years, the Boston Foundation has been an expert provider of Donor Advised Funds. Establishing a fund here is ideal for those who want the benefits of a private foundation with none of the administrative, legal, tax or regulatory burdens.

For more information about becoming a donor by opening a Donor Advised Fund, contributing to our Annual Campaign for Civic Leadership or making a planned or legacy gift, contact us at 617-338-2213 or donorservices@tbf.org.

Helping Companies Give Locally, Nationally and Internationally

Partnering with the Boston Foundation for your company's giving is an easy and dynamic way to maximize your impact on the communities you serve. We can customize a suite of services to assist with launching or growing your company's giving program—in Greater Boston, nationally or internationally. Opening a Company Donor Advised Fund at the Boston Foundation is an efficient and effective alternative to establishing a corporate foundation. The Foundation also encourages entrepreneurs to join Pledge 1% Boston to weave philanthropy into the fabric of their companies from the very beginning.

Maximizing Your Giving with the Philanthropic Initiative

A pioneer in the field of strategic philanthropy for 30 years, The Philanthropic Initiative (TPI) is an internationally recognized provider of philanthropic consulting and management services. Under the umbrella of the Boston Foundation, TPI offers strategic advising to private foundations, families, individuals and corporations here and around the globe. Building from the values and interests of each client, TPI delivers innovative, customized solutions that help clients maximize the impact of their philanthropy by defining priorities and strategies, implementing programs and evaluating success.

Getting Started

Every donor arrives at the Boston Foundation with a unique story, vision and goal. Our rich diversity of expertise offers a host of opportunities to meet your unique needs. We invite you to contact us so that we may assist you in determining the best approach for you.



APPLYING FOR A GRANT

Each year, the Boston Foundation distributes more than \$16 million in grants and other support from our endowment, the Permanent Fund for Boston, which has been built over the years through outright gifts and bequests from hundreds of generous Boston area donors who care deeply about our community.

VISION 2020

Funding Opportunities

Over the last 10 years, the Boston Foundation has invested the majority of its strategic funding in nonprofits that are “moving the needle” in five impact areas and two crosscutting strategies. We also distribute a portion of our resources through Open Door Grants, designed to respond to the expressed opportunities and needs of the communities we serve. And a number of grants and strategic investments are made to special issue-focused initiatives.

Five Impact Areas

Major grants are made to proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with our five impact areas:

EDUCATION
HEALTH & WELLNESS
JOBS & ECONOMIC DEVELOPMENT
NEIGHBORHOODS & HOUSING
ARTS & CULTURE

Crosscutting Strategies

We also have two crosscutting strategies:

The Nonprofit Effectiveness crosscutting strategy strives to accelerate social change by strengthening Greater Boston nonprofit organizations and leaders via two core strategies: building infrastructure and providing resources.

Visit www.tbf.org/grants for more information about all of these funding opportunities and detailed guidelines that will help organizations apply for a grant.

The **Grassroots crosscutting strategy** works to connect the Boston Foundation with key programs and innovative leaders, many who have had relevant lived experience. Through this strategy, the Boston Foundation strives to deepen our understanding of Greater Boston's communities and residents, especially those that have been historically excluded. Currently we have three programs under this strategy: Boston Neighborhood Fellows; Collaborate Boston and My Summer in the City. Visit our website for more on both of our crosscutting strategies.

Open Door Grants

The Open Door Grants program is a responsive grant program designed to respond to the community's expressed ideas and needs. New and existing nonprofit organizations in Greater Boston that are not directly aligned with the strategies, goals and approaches pursued in the Foundation's five impact areas can apply for support to meet existing needs as well as test new ideas and innovations that address the most critical challenges and biggest opportunities facing Greater Boston.



2019 FINANCIALS

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

Fund for the 21st Century

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

Financial Oversight

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

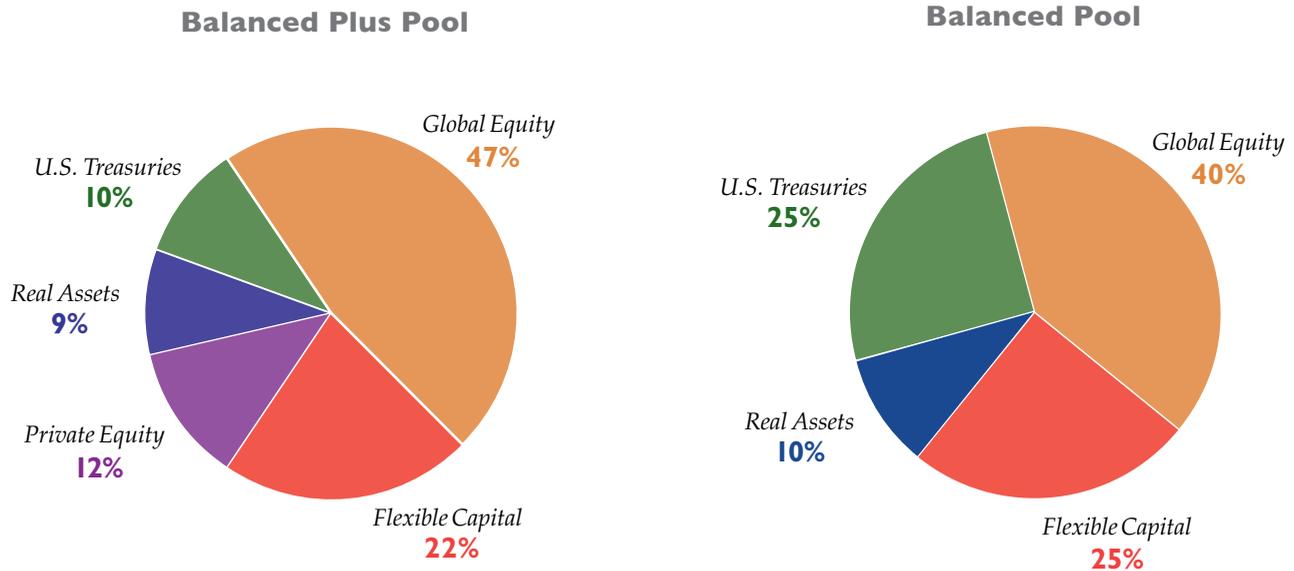
The Balanced Plus Pool assets include global stocks, investments with flexible capital managers, private equity, venture capital, real estate, and treasury securities. Diversification among multiple asset classes should help to reduce the volatility of the Foundation’s investment returns.

INVESTMENT PERFORMANCE

(June 30, 2019)

	1 YEAR	3 YEARS	5 YEARS	10 YEARS	15 YEARS
<i>Fund for 21st Century Investment Options:</i>					
Balanced Plus Pool	5.3%	8.9%	5.4%	8.0%	6.5%
Balanced Pool (established 2/1/11)	5.1%	7.4%	4.0%	n/a	n/a
Short-Term Pool (established 1/1/10)	2.3%	1.4%	0.9%	n/a	n/a
<i>Benchmarks:</i>					
FTSE World Bond Index	5.5%	1.0%	0.8%	2.2%	3.5%
65% MSCI A.C. World/35% FTSE World Bond Index	6.0%	8.0%	4.5%	7.5%	6.0%
MSCI All Country World Stock Index	5.7%	11.6%	6.2%	10.1%	7.0%
S & P 500 Stock Index	10.4%	14.2%	10.7%	14.7%	8.8%

ASSET ALLOCATION



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 2019 spending rate was 5.75% for its permanently restricted discretionary funds. For Fiscal Year 2020, the Board approved a spending rate of 5.5% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the spending rate applied to the current market value. The approved spending policy rate for designated endowment funds remained at 5% for Fiscal Year 2020.

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 2019, the operations of TPI added \$2.8 million of service fee income to the operations of the Foundation.

Financial Analysis

Total assets of the Boston Foundation were maintained at \$1.3 billion at June 30, 2019. For the year, net investment returns for the Balanced Plus Pool were 5.3%. Total investment returns were \$59 million. During this same period, the Foundation received \$151 million in contributions and paid \$151 million in grants. Other expenses totaled \$26.3 million, thus explaining the change in total assets.

Financial Statements

The Foundation's financial statements are prepared in accordance with policies and procedures overseen by the Foundation's independent Audit Committee and the Board of Directors.

A summary of the financial statements is shown on the following page. The statements and Form 990 are available on our website at www.tbf.org.

2019 AND 2018 SUMMARY FINANCIAL STATEMENTS

(in thousands)

ASSETS:	2019	2018
Investments	\$ 1,241,062	\$ 1,209,800
Cash & Equivalents	4,703	6,088
U.S. Treasury Notes	25,061	25,157
Receivables & Other	22,489	16,612
Total Assets	\$ 1,293,315	\$ 1,257,657
LIABILITIES & NET ASSETS:		
Accounts Payable and Other Liabilities	\$ 7,898	\$ 7,817
Grants Payable	2,663	2,091
Net Assets	1,282,754	1,247,749
Total Liabilities & Net Assets	\$ 1,293,315	\$ 1,257,657
REVENUES:		
Contributions	\$ 150,942	\$ 202,734
Service Fee Income	2,461	2,248
Net Investment Return	58,934	88,545
Total Revenues	212,337	293,527
GRANTS & EXPENSES:		
Grants	152,767	130,105
Change in Split Interest Trusts	248	(154)
Operating Expenses	24,317	21,736
Total Grants & Expenses	177,332	151,687
Change in Net Assets	35,005	141,840
Net Assets Beginning of Year	1,247,749	1,105,909
Net Assets End of Year	\$ 1,282,754	\$ 1,247,749

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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