

Human longing is for nothing less than
the reconciliation of time and place, of past and future,
of the many and the one, of the living and the dead.

Boston is precious because it lives in the national imagination,
and increasingly the world's, just so—
as a still brilliant map of America's good hope.

—James Carroll from *Mapping Boston*

Helping to Build The Good City

The Boston Foundation works closely with its donors to make real, measurable change in some of the most important issues of our day. A number of key areas of community life benefited from the Foundation's "Understanding Boston" model for social change in 2005:

Research This year, the Foundation's third biennial *Boston Indicators Report* identified the key competitive issues facing Boston and the region and offered an emerging civic agenda. The Foundation also released the third annual "Housing Report Card" and a report on ways for towns and cities to build affordable housing without increasing school costs. Other reports focused on goals for Boston Harbor and the Waterfront—and the impact and role of Greater Boston's higher education institutions through the Carol R. Goldberg Seminar.

Major Convenings All Boston Foundation reports are released at forums attracting thousands of people every year. In 2005 alone, the Foundation held some 20 forums on a diverse set of issues—including two major housing convenings, sessions focused on strengthening the nonprofit sector and community safety—and forums examining the effects of the tsunami and Hurricane Katrina on national and local philanthropy.

Task Forces Task Forces of experts and stakeholders are convened and facilitated by the Foundation. This year's included committed civic leaders seeking to create a new state funding mechanism for cultural facilities, strengthen the nonprofit sector state-wide, and chronicle the impact of the region's colleges and universities while calling for the creation of a new alliance of their leaders.

Public Policy This year, more than ever before, the Boston Foundation helped to inform and shape legislation addressing important areas of community life, including incentives to produce affordable housing, new funding vehicles for the state's cultural facilities, and increased support for workforce development programs that train for local employers' needs.

Honoring Our Past. Shaping Our Future.

Greater Boston's Community Foundation | Celebrating 90 Years

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1915: The Boston Foundation Opens Its Doors

A look at the year that Charles E. Rogerson and his son, Charles M. Rogerson, founded the Permanent Charity Fund—later to become the Boston Foundation—reveals areas of community life that have changed dramatically over the last 90 years, and others that have remained remarkably the same. As the clouds of what would be called World War I were gathering abroad, Boston was facing its own local challenges.

Boston has more than doubled its population since 1870 and is now the fifth largest city in the nation, with residents numbering **670,585**.

Democrat **James Michael Curley**, “the Mayor of the Poor,” is serving the first of his four terms.

First generation and foreign-born immigrants make up more than 70 percent of the population, with newcomers arriving by the thousands every year.

Italian immigrants and Jews from Eastern Europe settle in the decaying **North End**, described by some as “all bedrooms,” comprising one of the most densely populated neighborhoods in the world.

Among the Foundation’s first grantees are the city’s many **Settlement Houses**, which provide services to immigrants and work to improve conditions for the poor.

Infantile paralysis, later known as polio, has reached worldwide epidemic proportions.





D.W. Griffiths' *Birth of a Nation* opens at the Tremont Theatre, and **William Monroe Trotter** leads blacks on a march to protest the film, segments of which glorify the Ku Klux Klan.



Boston is the intellectual center of the **Suffrage Movement** and scores of women march down the city's streets for the right to vote.



Boston's park system, largely designed by Frederick Law Olmsted, is considered to be the finest in the nation.

A young musician named **Arthur Fiedler** joins the **Boston Symphony Orchestra**.

Boston is a major manufacturer of a variety of goods and products, from textiles to shoes, but working conditions are poor, hours are long, and wages are low.

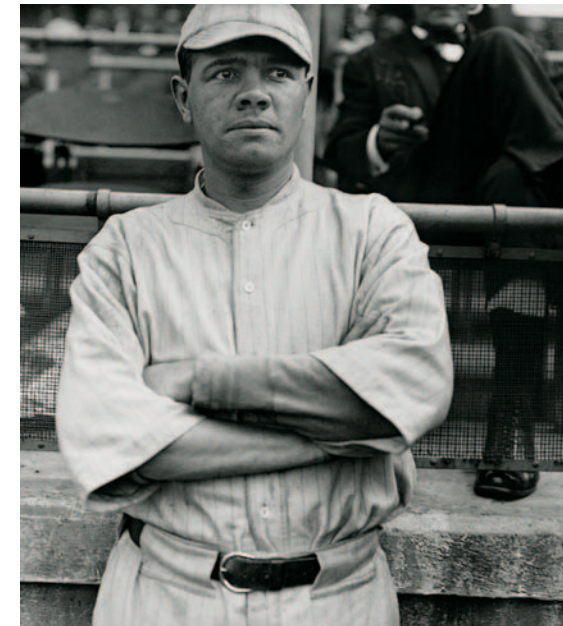
The North Bennet Street Industrial School begins its first Vocational Guidance and Placement program—and its founder, Pauline Agassiz Shaw, retires.

The streets are filled with **horse-drawn carriages as well as automobiles**. The price of gas has escalated to an unprecedented 25 cents per gallon and transit fare on Boston's subways is five cents.



Construction on the **Custom House Tower** is completed. At 496 feet, it is allowed to exceed the city's height limit of 125 feet because it is a federal building.

A 20-year-old rookie named **Babe Ruth** plays his first full season with the Boston Red Sox, and the team wins the World Series.



2005: At the Boston Foundation

In addition to grantmaking, the Foundation's role as a center for new information and a major convener and civic leader was the focus of much of the Foundation's work in 2005. Here are a few highlights:

A Record Year Sees More than \$63 million in Grants Made and New Gifts Received of More Than \$53 million.

Grants, totaling \$63 million, exceed last year's by \$13 million and set a new record. New contributions are more than \$53 million—the second highest in the Foundation's history and exceeding last year's total by more than \$10 million. Donors create 56 new funds. At year's end, the Foundation's assets top \$686 million.

A New Spending Rule Adds \$2 Million for Grants

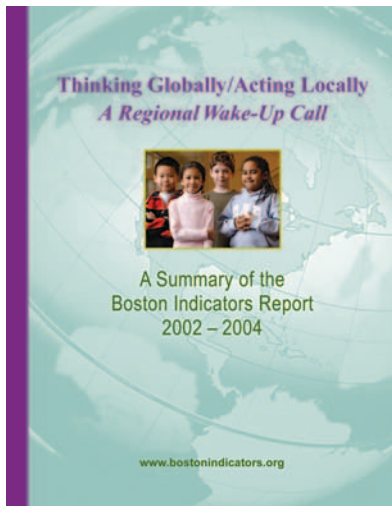
The Foundation leads the way among community foundations nationally by adopting a new spending rule of six percent for its discretionary assets, increasing the amount available next year for grants by \$2 million.

The Boston Indicators Report Sounds a Regional Wake-Up Call and Offers a Civic Agenda

Thinking Globally/Acting Locally, the third biennial Boston Indicators Report, identifies the key competitive issues facing our region—warning that technological and demographic changes are accelerating rapidly and will profoundly affect the future. The report also presents an emerging “civic agenda” designed to strengthen Greater Boston and the region.

Total Gifts to the Civic Leadership Fund Surpass Goal Again

Inspired by the Boston Foundation's increasingly visible role as a civic leader and social innovator, donations to the Civic Leadership Fund top \$678,000, surpassing the goal of \$600,000.





Understanding Boston

This series of fresh research, convenings, and action agendas produces 12 reports about the city and region, holds some 20 forums, and supports special task forces focused on the contributions of higher education to the region, increasing support for cultural facilities, and revamping the state's criminal records (CORI) system.



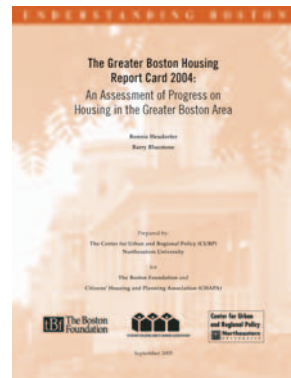
Informing Public Policy

The Foundation's civic leadership informed public policy in several key areas, including incentives to produce affordable housing, new funding vehicles for cultural facilities, and workforce development programs to meet local employers' needs.



The Third Annual Greater Boston Housing Report Card is Released

An assessment of progress in housing shines a spotlight on the fact that Greater Boston has become the most expensive metropolitan area in the United States, with high housing costs playing a significant role.

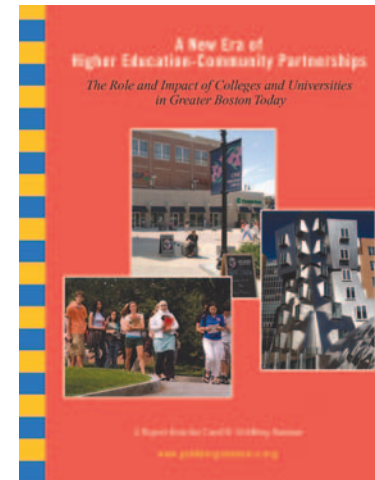


Community Conversations

A series of community conversations is launched to engage Boston's major ethnic groups in discussions about the challenges facing them. The first two focus on the Latino and Asian communities.

A Goldberg Seminar Report is Released on Higher Education's Role in Greater Boston

Leaders in higher education come together to examine the vital role that Greater Boston's 75 colleges and universities play in enhancing community life. A special gathering paves the way for future collaborations.



Understanding the Boston Foundation

Established 90 years ago, in 1915, the Boston Foundation is Greater Boston's community foundation—a major grantmaker, partner in philanthropy, key convener, provider of information, and civic leader.

Innovation

The Foundation's grantmaking, special initiatives, and civic leadership promote innovation across a broad range of compelling community issues, from educational excellence to affordable housing to workforce development to galvanizing support for the arts.

Information

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

Impact

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

Governance and Staff

The Foundation is overseen by a 20-member Board of Directors, selected to represent diverse interests within the community, and made up of 43 staff members who work closely with donors, grantees, civic leaders, and community residents to have a positive impact on Greater Boston. The staff includes professionals in the areas of grantmaking, philanthropy, finance and administration, and communications and public policy.

Grantmaking

Through its grants from Discretionary and Designated Funds to Greater Boston—and its Donor Advised Funds—the Foundation and its donors make more than \$63 million in grants to thousands of nonprofit organizations in Boston and across the country.

Primary Funding Areas

Grants address a broad range of core areas including Housing, Social Services, Health, Education, Cultural Institutions, Arts and Humanities, Conservation and the Environment, Community Development, and Civic Affairs.

Special Initiatives

Special grantmaking initiatives, designed by the Foundation's staff, address the most pressing areas of contemporary community life. Special initiatives include those that focus on civic engagement and voter participation, community safety, the new economy, the environment, pilot schools, homelessness prevention, and workforce development.



Donors

With some 850 separate funds established either for the general benefit of the community or for special purposes, the Foundation works closely with its donors to achieve their philanthropic goals. Some donors give unrestricted funds, others earmark gifts for special purposes, and a number work closely with Foundation staff to focus their dollars on the areas of community life they care about most.

Assets

The Foundation's endowment stands at more than \$686 million. Its charitable assets are invested in *The Fund for the 21st Century*—a pool of investment management products created specifically for the Foundation that includes nationally-renowned, principally Boston-based money managers.

\$19.5 Million in Additional Funds Generated

In addition to annual contributions from donors, the Boston Foundation also generates millions of dollars in additional resources to benefit Greater Boston. Here is a brief summary:

Close to \$3.3 million received for special initiatives, including those in the areas of civic engagement, homelessness prevention, racial justice, out-of-school time programming for teens, and workforce development.

A \$500,000 Boston Foundation annual investment in SkillWorks raises \$2.3 million from other private and public sources in 2005, with a total of **\$12 million pledged over five years**.

Close to \$800,000 in additional funds are managed and distributed, including those for arts service organizations and the Polaroid Fund.

Close to \$2 million is generated by collaboratives housed at the Boston Foundation, including \$403,000 for English for New Bostonians, \$255,000 for Home Funders, and \$316,000 for the Boston Schoolyard Initiative.

More than \$1.1 in additional funds is distributed in collaboration with the Foundation, including \$518,000 for homelessness prevention, \$235,000 for Civic Engagement, and \$2.3 million for Workforce Development.

A Program Related Investment of \$1.5 million for pre-development costs associated with single room occupancy housing for very low-income individuals is estimated to leverage some **\$10 million every year over the next 10 years**.



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HarborVest Partners, LLC



Richard M. Burnes, Jr.
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Senior Management (from left): Ruben Orduña, Vice President for Development; Kate Guedj, Vice President for Philanthropic and Donor Services; Gail Snowden, Vice President for Finance and Operations; Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs; Jerrold Mitchell, Chief Investment Officer; Paul Grogan, President and CEO; Terry Lane, Vice President for Program; Stephen Chan, Special Assistant to the President.

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Letter from the Chair

The Boston Foundation's 90th Anniversary has led me to think about those who guided this organization in 1915. Back then, it was called the Permanent Charity Fund and the board was made up of just seven people—but their grantmaking was surprisingly innovative for such new philanthropists. Clearly, they were acutely aware of the searing poverty in which Boston's newest immigrants lived—and they responded.

Among the very first grants went to Settlement Houses to provide instruction in English and numerous other services to immigrants. Some of those organizations still exist, in the form of organizations like Federated Dorchester Neighborhood Houses and United South End Settlements. It is remarkable, in fact, how many community-based institutions funded back then are still thriving—from the Women's Educational and Industrial Union (now the Women's Union) to the North Bennet Street School. Like the Boston Foundation, these institutions have survived because they have successfully adapted to change.

Today, the Boston Foundation's board is larger and far more diverse than it was in 1915—and I'm proud to say that the Foundation is not just adapting to change, it is helping to drive it.

I had the honor of moderating a forum—one of 20 "Understanding Boston" forums held last year—on the Criminal Offender Registration Information (CORI) system and its role in preventing some people from moving forward with their lives. What a stimulating discussion we had that morning. And, just weeks later, the Foundation was asked to share its report on CORI with our state's legislators, to guide them in their policymaking.

This is just one example of the good work that is driven and informed by a deeply committed staff and an extremely active board. In the spring, we lost several treasured members of the board to term limits. I am particularly grateful to Hanson Reynolds, who served as vice-chair, and whose wise counsel and positive energy contributed so much. We will also miss the contributions of Judge Marianne Bowler and Ira Jackson. But, we are delighted to welcome new members: Jackie Jenkins-Scott, President of Wheelock College; and Paul La Camera, General Manager of WBUR—and we look forward to the contributions they will make.

This year, our donors stepped up to the plate more than ever before, offering close to \$500,000 in co-funding, which allowed the Foundation to expand its own resources in support of grantees. Our donors are the lifeblood of this institution. The very first was a financier named James Longley, whose bequest of \$4 million gave the old Permanent Charity Fund the capacity to make a discernable difference in Boston. Today's donors are not only providing financial support, but many are actively engaged in their philanthropy.

The name of this foundation has changed, but there is no question that it is "permanent," nor that it is redefining the word "charity," through a dynamic mix of grantmaking and civic leadership. We celebrate this 90th anniversary with pride in the things we have accomplished—with our donors and other partners—a keen awareness of the work that remains, and a tremendous sense of hope about the future.

Reverend Ray A. Hammond
Chair

Letter from the President

As the Boston Foundation celebrates its 90th anniversary, the city and region this community foundation serves has in many ways never been healthier or more dynamic. Informed observers agree that we have successfully converted to a Knowledge Economy, which rests heavily on ideas and innovations in higher education, health care, technology and finance.

Greater Boston has undeniable advantages in these arenas—including thousands of skilled professionals, a unique constellation of colleges and universities, and peerless teaching hospitals and research labs. And, we have the most diverse population in our history. In short, Boston has made itself into one of the most vital and attractive cities in America, if not the world.

That's the good news. The bad news is that these advantages are occurring in the midst of continuing disparities for far too many children and families—disparities in education, in income and in health care. Masked by our achievements is the heartbreaking tragedy of generations of children who are not being prepared to succeed. And today, more than ever, our future prosperity depends on preparing all of our young people for success.

I say this, in part, because our position as a hub of innovation is in some jeopardy right now. This didn't happen as suddenly as a plane crashing into a building or a flood sweeping away an entire region, but it has the potential to become our very own, slow-motion urban disaster.

Those who say that we can thrive in a Knowledge Economy also tell us that an educated, skilled and talented workforce is essential to this economy. And that is a disturbingly accurate description of the very people we are beginning to lose to

other regions of our country. In fact, ours is the only state in the nation that experienced a net population loss last year. If it weren't for foreign immigration, the picture would be far bleaker.

A primary reason for this alarming trend is, of course, our high cost of living, especially our inflated housing market. By now, I'm sure you have learned that our region is deemed to be the most expensive in the country in which to live. This is not where we want to be number one.

We know, however, what steps we must take to counter these dangers—to meet what I call the “talent imperative.” We need to build more housing in order to retain and attract new talent. We need to educate the next generation of workers and help new Bostonians receive the English skills they need to advance. And, we need to train a workforce for the more than 60,000 jobs that go unfilled every day in our state.

The narrative section of this annual report describes a concerted effort on behalf of the Boston Foundation—and our many donors and partners—to address these issues through grantmaking and through civic leadership.

We approach this work with a tremendous sense of optimism, because we know that this city has reinvented itself, over and over again, and that we can do it again. Working together, we not only will adapt to these changes, we will embrace them and emerge stronger than ever before.

Paul S. Grogan
President and CEO



Boston Foundation staff in front of the Cyclorama at the Boston Center for the Arts. As we celebrate 90 years as Greater Boston's community foundation, we take the opportunity to remind readers that 90 years is also the average age of our state's cultural facilities. We invite you to work with us and our partners to meet the bricks and mortar needs of these institutions, which are so vital to the economic and spiritual well-being of our region.



Honoring Our Past.

Meeting the Talent Imperative

Boston's history reveals a city that has adapted, again and again, to the economic and social realities of the day—first serving as a center of international maritime commerce, then as a leader of industry. The historian Thomas H. O'Connor tells us that by the early part of the 20th century, however, when the Boston Foundation was founded, Boston's textile factories were deteriorating and the city's influence was weakening. In his book "The Hub," O'Connor quotes Barrett Wendell, who moaned, "We are vanishing into provincial obscurity. America has swept from our grasp. The future is beyond us."

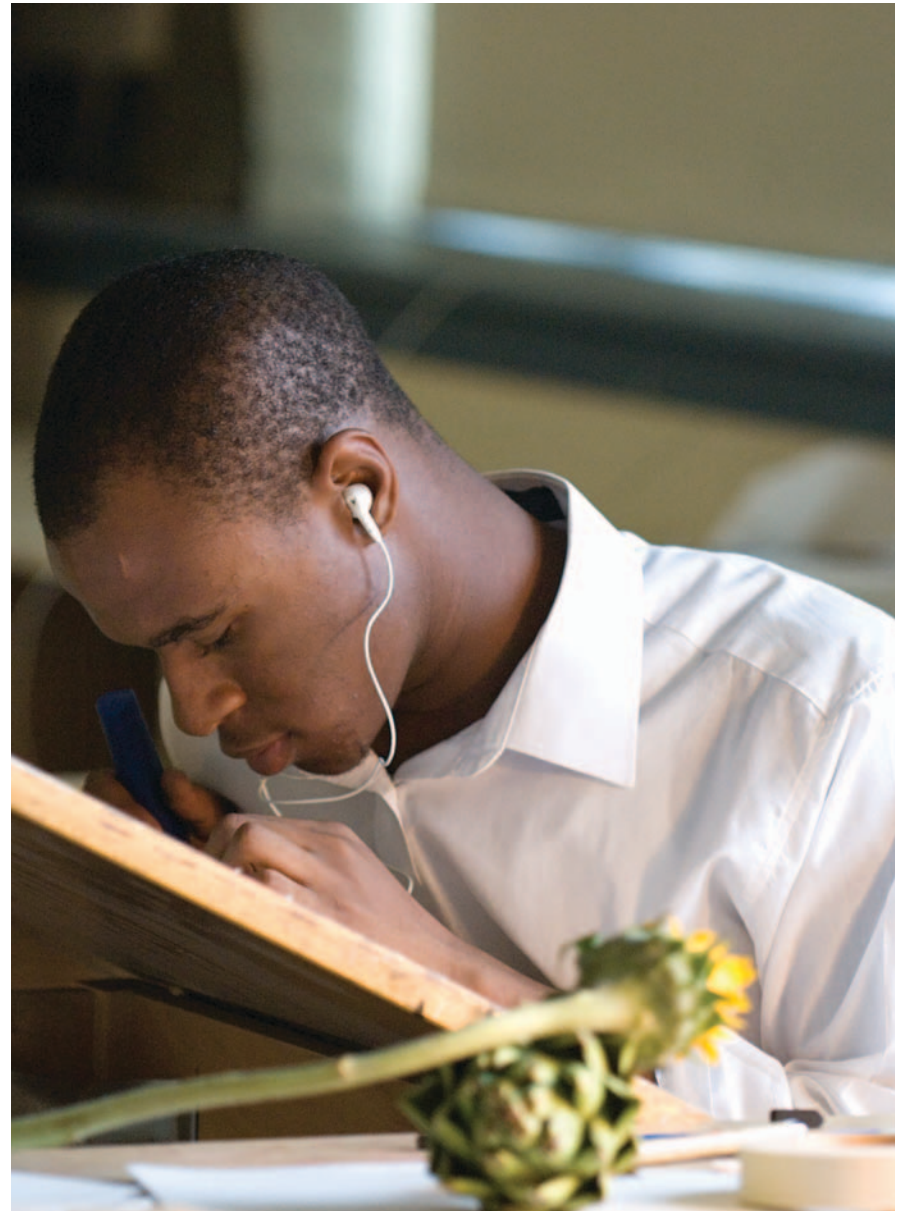
Mr. Wendell was wrong. Boston would go on to successfully build a new economy based on service industries, finance, and retailing and wholesaling. And, by the end of the century, the city and the region had successfully adapted to the Knowledge Economy, which is fueling prosperity today. Greater Boston has numerous advantages in this economy, including thousands of skilled professionals, hundreds of start-up technology and venture capital firms, an extraordinary array of 75 topnotch colleges and universities, and world-renowned hospitals and research laboratories.

Shaping Our Future.

Not unlike the Boston of 90 years ago, however, these advantages are beginning to slip from our grasp. College students are starting to head home after graduating—or settling elsewhere—fleeing an area that reportedly has the highest cost of living in the country. Employers are having a hard time recruiting young professionals who are moving to cities where they can afford to purchase a starter home or condo. And the very character of work is changing—demanding specific skills and becoming far less place-based than ever before.

In today's "flat and wired" world, as the *Boston Indicators Report 2002-2004* tells us, it is crucial that Boston and the region maintain its ascendant position in the Knowledge Economy, because there is no other arena in which we can excel or even succeed, and, as a result, the future would, indeed, be 'beyond us.'

In 2005, in addition to making grants and leading special initiatives across a broad range of areas, the Boston Foundation responded, strategically, to this very real threat to our economic well-being by focusing on four key program areas: Education, Workforce Development, Housing, and Economic Development. The Foundation approaches these areas of community life not only through its grant-making, but also through civic leadership—and in partnership with numerous other groups, public and private, all focused on rising to the historic challenge of "Meeting the Talent Imperative."



Promoting Excellence in Education



North Bennet Street Industrial School offered classes to children of immigrants and recreational and vocational training to older students.

In 1915, the Boston Public Schools determined that the children of poor immigrants had to prepare themselves for better lives than their parents and began to provide not only basic education, but vocational training. Today, the Boston Foundation is focused on the full range of education, from K-16 to after-school programming, to preparing young people for work in the Knowledge Economy.

Great Schools, Pilot Schools and Charter Schools

This year, the Boston Foundation made grants totaling \$75,000 to the Great Schools Campaign, a coalition of education and business leaders organized by Mass Insight Education. The Campaign targets the state's 114 failing schools by focusing on teacher training, longer school days, and math and science instruction.

The Foundation also continued its commitment to decentralizing Boston's schools through a 10-year, \$2.5 million program-related investment in Charter Schools and a \$100,000 grant to the Center for Collaborative Education to evaluate and strengthen Pilot Schools, which are performing well on all indicators.

Focusing on the Commonwealth's youngest residents, the Foundation is also a major partner in Strategies for Children's "Early Education for All" campaign,



Baldwin Early Learning Center prepares students for school.





which is dedicated to making voluntary, high-quality early childhood education available to all Massachusetts children. This year, the campaign had major legislative victories, with more than \$20 million in new funding made available for early education.

The Foundation is also deeply committed to strengthening the Boston Public Schools. One approach is based on the idea that when parents have a better understanding of the choices available, more of them will keep their children in the Boston Public Schools, resulting in increased economic diversity and stable neighborhoods. The Foundation provided \$200,000 in funding to Y/BPS, a partnership between the YMCA of Greater Boston and the Boston Public Schools that places parents in YMCA branches to offer critical information about the public schools to other parents.

What the Boston Indicators Report Tells Us About Education MCAS improvement rates in the Boston Public Schools surpassed the state average in nearly every grade in the spring of 2004, with long-term gains among all racial and ethnic groups despite persistent disparities. However, a key measure of school success is the ability to read by grade three. In the spring of 2005, only 31% of Boston's third graders were reading at grade level. Go to bostonindicators.org and choose Education for more.



Boston Arts Academy is a Pilot School launched with Boston Foundation funding.

Investing in Workforce Development

In 1915, most jobs were in textiles and manufacturing, while today, some of the best opportunities are in the areas of technology and health care. As was true 90 years ago, however, English instruction is crucial to preparing immigrants for jobs. In the early 20th century, the Foundation funded Settlement Houses to offer English classes—and North Bennet Street Industrial School for job training. Today, the Foundation's approach still includes support for English classes and job training—and a special initiative called SkillWorks.

Teaching English, Training Young People, Launching SkillWorks

The Foundation is a major partner in English for New Bostonians, a four-year, private-public community partnership operated by the Boston Adult Literacy Fund. The program provides grants and technical assistance to community-based programs that offer English for Speakers of Other Languages (ESOL) instruction in Boston's neighborhoods. A grant of \$100,000 in 2005 was designed to expand and strengthen these programs—and reduce unacceptably long waiting lists for classes.

The Foundation also made a \$100,000 grant to Year Up, which is preparing urban



Year Up trains young adults for jobs in technology.



As World War I loomed, young Bostonians learned Morse Code.



Trainees of Partners in Career and Workforce Development, a SkillWorks grantee



**What the Boston Indicators
Report Tells Us About Workforce**

Development The state's workforce did grow from 2001-2004, but only due to foreign immigration, yet immigrants face long waits for English classes and difficulties in receiving in-state tuition rates at public institutions of higher education. And, funding for public higher education in the Commonwealth has declined by 23% since 2001, ranking the state 49th out of 50 in tax appropriations for higher education, per \$1,000 of income. **Go to bostonindicators.org and choose Economy for more.**

young adults for life and work in this technology-driven society. The Foundation was “there at the beginning” for this innovative organization, which provides technology job training to disadvantaged young adults between the ages of 18-23. Some 87 percent of Year Up’s graduates go on to earn full or part-time jobs. This year’s grant supported a project that will award college credit to Year Up’s graduates.

With 16 public and private partners, the Boston Foundation is coordinating the largest and most ambitious workforce development initiative in Boston’s history. SkillWorks is a five-year, \$15 million investment partnership among local and national funders, the City of Boston and the Commonwealth of Massachusetts designed to provide Boston with a stream of reliable, skilled employees. A direct response to the workforce needs of Boston’s health, hotel, and automotive industries, SkillWorks actively engages employers in designing programs to meet their needs—and helps to prepare skilled workers for real jobs.



Immigrant women prepared for jobs in the textile industry.



African-American families moved to the South End and other neighborhoods to escape the crowded West End.

Responding to the Crisis in Housing

By 1915, more than 30,000 Italian immigrants had moved into the North End's tenements—and only Calcutta could rival the North End for its population density. While our city still has some neighborhoods that are struggling to improve housing stock and living conditions, rising housing costs are pushing many people out of the neighborhoods they grew up in—and the Boston Foundation is taking the critical need for affordable housing head on.

Providing Leadership, Preventing Homelessness, Making Progress

Last year, the Commonwealth Housing Task Force made extraordinary progress in paving the way for new housing with the passage of Chapter 40R, which encourages communities to zone for multifamily and single-family housing on small lots near transportation nodes. This year, losing no time to respond to concerns expressed by cities across the state, the Task Force released a new report, titled “School Cost Analysis,” which provides detailed data to insure communities against increased



Housing in Roxbury developed by Urban Edge



The North End was one of the most densely inhabited neighborhoods in the world.

school costs and pave the way for the successful implementation of Chapter 40R.

The Task Force gains its strength from one of the most extensive and successful networks of Community Development Corporations (CDCs) in the country, many of which received seed funding from the Boston Foundation. Now, with a total of \$140,000 in Boston Foundation funding, major CDCs are working together to build new transit-oriented housing.

The Fairmount Collaborative has four CDC partners—serving Dorchester Bay, Codman Square, Mattapan, and Southwest Boston—all committed to building 650-1,200 new units along the underused Fairmount commuter rail line that goes from South Station to Readville in Hyde Park. And, Urban Edge and Jamaica Plain Neighborhood Development Corporation have formed a joint enterprise to develop 10 acres adjacent to the Jackson Square transit stop, which will create 200-400 units of affordable housing.

For the state's poorest families, the Boston Foundation and 12 other funders are investing in the most humane and practical way to prevent homelessness. A joint program called Home Funders plans to raise \$26 million to create 1,000 permanent homes and leverage an additional 3,000 affordable units in the next 10 years. Already, the partners have pledged up to \$15.5 million in loans and more than \$800,000 in grants.

What the Boston Indicators Report Tells Us About Housing

Between 2001 and 2003, Mayor Menino's Leading the Way initiative spurred \$2 billion in public and private investment to produce nearly 13,000 market rate and affordable housing units. Since 1997, median sale prices for housing have soared by 90% in the region and 134% in Boston. Regionally, housing construction lags the target by about 3,000 units per year, with production levels at only 11,000 annually. Go to bostonindicators.org and choose Housing for more.



Open space at Roxbury's Academy Homes



Small businesses receive start-up support from Jamaica Plain Neighborhood Development Corp.

Strengthening the Local Economy

In 1915, Boston's prominence as a center of industry was challenged by the growth of other port cities and the westward expansion of the national borders. New England's economic boom turned into a bust when textile and shoe factories moved to cheaper labor markets in the South. Today, Boston finds itself in a transitional era once again, as the city works to strengthen its position in the Knowledge Economy.

Investing in Neighborhoods, Main Streets and Small Businesses

This year, one of the Foundation's unsolicited "Out of the Blue" grants of \$75,000 went to Boston Community Capital, which is working to build healthy communities where low-income people live and work. The approach is to invest in projects that provide affordable housing, decent jobs, and goods and services by building connections between low-income neighborhoods and mainstream capital markets. Its recent success can be measured by an allocation award of \$70 million in New Markets Tax



Small shops and businesses built a sense of community in Boston's neighborhoods.



Shoe and leather factories were major employers in the early 1900s.

What the Boston Indicators Report Tells Us About Our Economy

Visitors to Greater Boston spent \$7.9 billion and supported 127,000 jobs in 2004. Patents rose by 8% between 1998 and 2004, placing Massachusetts first among leading technology states. However, Massachusetts lost 84,000 jobs from 2001 to 2004—almost half in high tech industries—and Boston lost about 30,000 payroll jobs between March of 2001 and March of 2005. Go to bostonindicators.org and choose **Economy for more.**

Credits from the U.S. Department of the Treasury, one of the largest awards to any nonprofit in the country. The Foundation also supported longtime grantee Local

Initiatives Support Corporation for its Campaign for Communities, which seeks to

raise and invest \$33 million in Greater Boston's neighborhoods, towns and cities to strengthen the local economy. And, the Foundation is also a partner in Boston Main Streets, established by the City of Boston as a public-private partnership to revitalize the city's neighborhood commercial districts. Each of the 19 local Main Streets organizations provide merchants and community residents with the tools and information they need for their commercial centers to compete in today's marketplace.

To strengthen the vitality of companies that are owned and run by people of color, the Boston Foundation, the City of Boston, United Way of Massachusetts Bay, Blue Cross Blue Shield of Massachusetts—and several other corporations—have invested \$1.3 million in The Initiative for a New Economy. The initiative is designed to expand commerce between Boston-area businesses of color and large corporations—and, as a result, help home-grown companies gain much greater access to the main-stream marketplace.



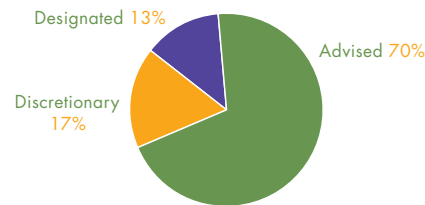
Spire Printing in Dorchester (top) and Central Machine in Waltham provide jobs to local residents.

Selected Grants from 2005

In 2005, the Boston Foundation and its donors made \$63 million in grants to nonprofit organizations in the Greater Boston community and across the country.

To convey the full breadth of this grant-making, a representative group of selected grants from all funds—Discretionary, Designated and Advised—are presented in the following pages, organized by broad categories. The Foundation’s Board of Directors authorizes all grants.

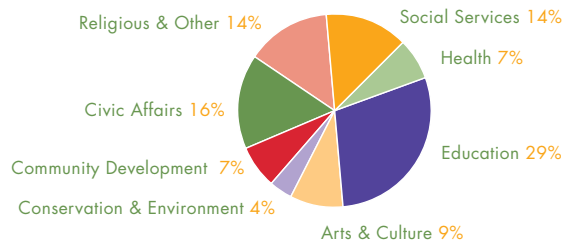
2005 Grants Paid by Fund Type



Selected Grants from Discretionary Funds

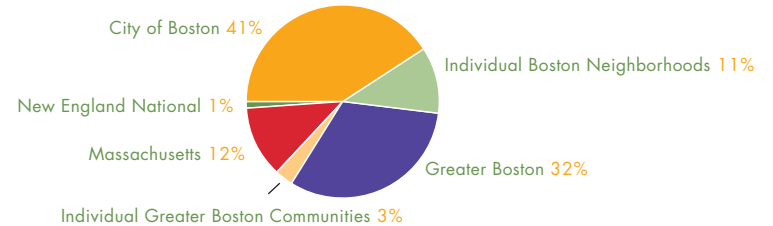
Discretionary Funds are the primary funds for which nonprofit organizations may apply. They include: the Community Fund, which is the largest unrestricted fund and has been built by hundreds of civic-minded Bostonians over the years; Named Funds—often established to honor a notable person or organization; and Field of Interest Funds, created by donors who care deeply about a specific area of community life. Many grants are made from a combination of these different kinds of funds. In the following lists, we briefly describe the purpose of each grant.

2005 Grants Paid by Program Area



The largest proportion of grant dollars from Discretionary Funds benefit Greater Boston as a whole (32%), or target the City of Boston and its individual neighborhoods (52%). Of the neighborhoods, the largest percentage of funds go to Roxbury, North Dorchester and East Boston. Another 12% go to projects that benefit the entire state.

Geographic Distribution of Discretionary Grants



Selected Grants from Designated Funds

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

Selected Grants from Donor Advised Funds

Donor Advised Funds are established by people who want to be actively involved in the grantmaking process. Many of these donors have a commitment to strengthening the Greater Boston community, and take advantage of the knowledge the Boston Foundation has about the issues that are most pressing and the nonprofit organizations that are most effective. There are no purposes listed for these grants because they are generally for broad organizational support.

SELECTED Social Services GRANTS

A total of **\$9,150,600** in grants was made in the area of Social Services. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Disability Policy Consortium, Inc., \$50,000

From the Edith M. Ashley Fund

For the Consortium's constituent involvement and advocacy activities

Haitian Multi-Service Center, \$35,000

\$15,000 from the Frederika Home Fund and \$20,000 from the Katherine Dexter Shelman Fund

To support the Haitian Elders Program

Home for Little Wanderers, \$75,000

From the Starr Foundation Fund

For support of the Transition to Independent Living Task Force to examine issues facing youth leaving the care of the state

Massachusetts Society for the Prevention of Cruelty to Children, \$30,000

From the Louis Agassiz Shaw Fund

For evaluation of the Connecting Families program which aims to prevent child abuse and neglect

Grants from Designated Funds

American Red Cross of Massachusetts Bay, \$5,949

From the Dana P. and Maude E. Simpson Memorial Fund

Crittenton Hastings House, \$14,240

From the James F. Casey Fund

Home for Little Wanderers, Inc., \$10,752

From the Harry D. Neary Fund

Rosie's Place, Inc., \$25,000

From the Willis Munro Fund

Grants from Donor Advised Funds

Big Brothers of Massachusetts Bay, \$26,000

From the Carol and Howard Anderson Fund

Julie's Family Learning Program, Inc., \$50,000

From the Albert J. & Diane E. Kaneb Family Fund II

Open Door Cape Ann Food Pantry, Inc., \$25,000

From the Gilbert H. Hood Family Fund

Samaritans, Inc., \$10,000

From the Atlantic Fund



SELECTED Health GRANTS

A total of **\$4,554,183** in grants was made in the area of Health. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Boston Public Health Commission, \$50,000

From the TBF Community Fund

For support of the Neighborhood Treatment and Prevention Coalitions

Health Law Advocates, Inc., \$40,000

From the TBF Community Fund

For support of the Children's Mental Health Parity Project

Joseph M. Smith Community Health Center, \$25,000

From the Harriet M. Bartlett Fund

To establish an Outreach Department targeted at Latino and Haitian immigrants

Massachusetts Coalition of School-Based Health Centers, \$35,000

\$33,200 from the TBF Community Fund and \$1,800 from

the Janet S. & George T.B. Perkins Fund

To strengthen the Coalition's administrative operations



Grants from Designated Funds

Beth Israel Deaconess Medical Center, \$22,654

From the Primary Care Fellowship Program Fund

Caritas Good Samaritan Medical Center, \$28,479

From the James F. Casey Fund

Massachusetts Eye and Ear Infirmary, \$2,343

From the Stetson Witcher Fund

Metrowest Community Health Care Foundation, \$36,107

From the Charles and Cornelia Pfaff Fund

Grants from Donor Advised Funds

Children's Hospital Corporation, \$100,000

From the James and Margaret Wade Fund

Fund for Neurologic Diseases, \$10,000

From the Corvelli Fund

Harborlight Dental Clinic, \$56,000

From the Philancon Fund

Riverside Community Mental Health and Retardation Center, \$10,000

From the Stone Charitable Fund

SELECTED Education GRANTS

A total of **\$17,733,713** in grants was made in the area of Education. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Center for Collaborative Education, \$125,000

\$110,000 from the Theodore C. Hollander Trust Fund and

\$15,000 from the Edith M. Ashley Fund

To provide technical assistance and other support to Boston Pilot Schools and to research the performance of Pilot Schools

Efficacy Institute, Inc., \$100,000

\$86,000 from the TBF Community Fund, \$9,200 from the Janet S. & George T.B.

Perkins Fund, and \$4,800 from the David R. Pokross Fund for Children in Need

To begin a Boston Campaign for Proficiency in Cluster Seven of the Boston Public Schools

Mass Insight Education and Research Institute, \$50,000

From the J.E. Adrien Blais Fund I

For the Great Schools Campaign

Rennie Center for Educational Research & Policy, \$50,000

From the TBF Community Fund

For the Transforming Labor Management Relations in Education Program

Grants from Designated Funds

Hingham High School, \$1,663

From the Douglas A. Eaton Memorial Fund

Perkins School for the Blind, \$14,503

From the Rae and Aaron Alberts Foundation Fund

Phillips Academy, \$1,000

From the George and Judy Webb Fund

St. Coletta and Cardinal Cushing Schools of Massachusetts, Inc., \$196,182

From the John S. McCann Fund

Grants from Donor Advised Funds

All Newton Music School, Inc., \$16,000

From the Field Parker Fund

Boston Center for Adult Education, \$40,000

From the Dr. Jordan S. Ruboy Charitable Fund

EdVestors, \$27,500

Paid to the Boston Foundation from the RETQ Fund

Suffolk University, \$15,000

From the Sydell and Edward I. Masterman Fund



SELECTED Cultural Institutions, Arts and Humanities GRANTS

A total of **\$6,093,034** in grants was made in the area of Cultural Institutions, Arts and Humanities.

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

Grants from Discretionary Funds

Arsenal Center for the Arts, \$50,000

\$46,000 from the Stephen & Sybil Stone Arts Fund and

\$4,000 from the TBF Community Fund

To plan and launch programming at the Arsenal Center for the Arts in Watertown

First Night, Inc., \$100,000

From the TBF Community Fund

For implementation of a new business plan

Massachusetts Advocates for Arts, Sciences and Humanities, \$50,000

From the TBF Community Fund

For implementation of a new strategic plan

Zoo New England, \$60,000

From the TBF Community Fund

To launch a comprehensive strategic planning process

Grants from Designated Funds

Boston Symphony Orchestra, \$78,655

From the Miriam and Sidney Stoneman Fund

Children's Museum, \$70,764

From the Michael Spock Community Service Fund

Easton Historical Society, \$10,000

From the Robert D. and Sally G. King Fund

Watertown Free Public Library, \$28,386

From the Charles T. Burke Fund for the Watertown Free Public Library



Grants from Donor Advised Funds

Arts and Cultural Alliance of Newport County, Inc., \$5,000

From the Dainger Fund

Boston Ballet, Inc., \$50,000

From the Jonas Family Fund

Coolidge Corner Theatre Fund, \$35,000

From the Golden Family Fund

Featherstone Center for the Arts Inc., \$30,000

From the M.R. Kidder Charitable Fund

SELECTED Conservation/Environment GRANTS

A total of **\$2,423,068** in grants was made in the area of Conservation/Environment. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Charles River Conservancy, Inc., \$20,000

From the TBF Community Fund

For a Service Learning Coordinator to facilitate use of the Charles River Basin for after-school and school-based programs

Crittenton Hastings House, \$40,000

\$38,800 from the TBF Community Fund and \$1,200 from the Norman Everett Pearl Fund

For staff and community involvement costs associated with planning for Crittenton Woods

Museum of Afro-American History, Inc., \$50,000

From the TBF Community Fund

For preparation for the Abolitionist Exposition in 2005 and the Museum's Bicentennial Celebration in 2006



Trust for Public Land, New England, \$25,000

From the TBF Community Fund

For the Greener Boston project

Grants from Designated Funds

Capen Hill Nature Sanctuary, \$12,319

From the Gaywest Farm Fund

Natural Resources Trust of Easton, \$157,796

From the Sheep Pasture Fund

Minnechaug Land Trust, \$2,000

From the Herbert Farnsworth Fund

Essex County Greenbelt Association, Inc., \$30,648

From the Allyn Cox Fund for Essex County Greenbelt

Grants from Donor Advised Funds

Conservation Law Foundation, \$25,000

From the Butler's Hole Fund

Friends of the Public Garden, \$16,667

From the LMG Fund

Massachusetts Audubon Society, Inc., \$3,000

From the Morgan Palmer Charitable Fund

Trustees of the Reservations, \$6,000

From the Walter A. & Hope Noyes Smith Fund

SELECTED Community Development GRANTS

A total of **\$4,643,218** in grants was made in the area of Community Development. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Conservation Law Foundation, \$50,000

From the TBF Community Fund

For the Greater Boston Institute, which promotes inclusive and environmentally sensitive development, open space, housing and transportation planning in Boston

Massachusetts Association of Community Development Corporations, \$40,000

From the TBF Community Fund

For a public education and advocacy campaign to expand resources for affordable housing.

Covenant Housing Initiative, \$50,000

\$25,000 from the TBF Community Fund, \$10,000 from the Harry L. Nason Fund, and \$15,000 from the Katherine Dexter Shelman Fund

To support infrastructure building for the Initiative



Chinese Progressive Association, \$125,000

From the TBF Community Fund

For its Campaign to Protect Chinatown

Grants from Designated Funds

Community Resources for Justice, \$26,181

From the Gertrude Hooper Fund

Homes for Families, Inc., \$75,000

From the Starr Foundation Fund

Roxbury Multi-Service Center, \$5,134

From the Ruby C. Emerson Fund

Urban Edge, \$22,500

From the Home Funders Fund

Grants from Donor Advised Funds

Allston-Brighton Community Development Corporation, \$50,000

From the Microsoft Unlimited Potential Fund

Center for Teen Empowerment, \$80,000

From the Trefler Fund

Greater Lawrence Habitat for Humanity, \$3,000

From the Skylight Fund

Housing Opportunities for Women, \$30,000

From the J. Jill Compassion Fund

SELECTED Civic Affairs GRANTS

A total of **\$2,173,546** in grants was made in the area of Civic Affairs. Here is a brief representative sampling from the three different types of funds.

Grants from Discretionary Funds

Commonwealth Legislative Seminar and Network, \$45,000

\$40,500 from the TBF Community Fund, \$3,300 from the Katherine C. Wheeler Fund, and \$1,200 from the Massachusetts Civic League Fund

To support efforts to train leaders of communities of color to become effective advocates on relevant issues and develop working relationships with policymakers

Massachusetts Immigrant and Refugee Advocacy Coalition, Inc., \$75,000

From the TBF Community Fund

For its advocacy activities designed to build a strong and informed constituency for issues that confront immigrant and refugee communities in the state

Massachusetts Voter Education Network, Inc., \$25,000

From the TBF Community Fund

To engage nonprofit organizations in Lynn and Somerville in voter education activities based on the Boston VOTE model

TransitWorks, \$50,000

From the TBF Community Fund

For expansion of activities designed to help the Massachusetts Bay Transportation Authority (MBTA) retain and renew relationships with the riding public

Grants from Designated Funds

Andover Village Improvement Society, \$5,000

From the Bessie P. Goldsmith Fund

Massachusetts Affordable Housing Alliance, Inc., \$10,000

From the Civic Engagement Project Fund

Massachusetts Association of Community Organizations for Reform Now, \$30,000

From the Civic Engagement Project Fund

Social Law Library, \$73,985

From the Social Law Library Endowment Fund

Grants from Donor Advised Funds

Amnesty International of USA, Inc., \$5,000

From the Rust Bowl Fund

Anti-Defamation League of B'nai B'rith, \$10,000

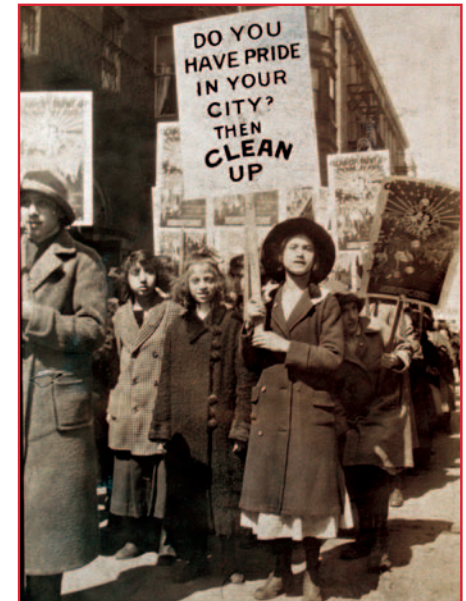
From the David G. Mugar Fund

National Conference for Community and Justice, \$15,000

From the Rodgers Community Fund

Robert F. Kennedy Children's Action Center, \$5,500

From the Mayel Fund



SELECTED Special Initiatives GRANTS

The Boston Foundation plays a leadership role in developing focused initiatives in key areas of civic life where intensive involvement has the potential for significant impact. On these pages are brief descriptions of the initiatives and a brief representative sampling of the grants from them.



The Civic Engagement/Voter Participation Initiative

This initiative was established by the Boston Foundation and supported by several foundations. It is specifically focused on increasing voter turnout in low-income neighborhoods where voter participation has been historically low. Phase One of this three-year nonpartisan voter participating effort raised \$1 million and ended in the spring of 2005. Based on its success, the funders decided to launch Phase Two and have raised \$1.7 million for the second phase, which will be managed by the Massachusetts Voter Education Network. In 2005, grants of \$105,000 went to the following groups for Phase Two:

Boston Tenant Coalition

Chelsea Human Services Collaborative

Chinese Progressive Association

Dudley Street Neighborhood Initiative

Fenway Community Development Corporation

Hyde Square Task Force

Massachusetts Affordable Housing Alliance

Massachusetts Association of Community Organizations for Reform Now

Community Safety Initiative

This three-year, \$1.5 million initiative, which came to a close in Spring 2005, sought to revitalize and strengthen successful community safety efforts focused on addressing immediate and systemic issues around rising crime in Boston. In addition to its grantmaking this year the Foundation also hosted a forum with the Crime and Justice Institute to discuss the Criminal Offender Record Information (CORI) system.

The forum drew over 200 people and addressed potential strategies to respond to the major challenges of the system. All of the grants made through this initiative are from the Community Safety Fund unless otherwise stated. Here is a sampling of grants made this year:

Black Ministerial Alliance of Greater Boston, Inc. \$20,000

To support the engagement and coordination of pastors in anti-violence work

Boston Ten Point Coalition, Inc., \$65,000

For support of capacity building and organizational development efforts

Boys and Girls Clubs of Boston, Inc. \$10,000

To support efforts to keep clubhouses open weeknights until 9:00 pm from August 16 through September 3, 2004

Harvard University John F. Kennedy School of Government, \$50,000

For support of the Research Partnership to Prevent Serious Violence in Boston

Roxbury Youthworks, Inc. \$25,000

For support of the Female Focus Initiative

Fund for the Environment

The Fund for the Environment operates the New England Wildlife Grants Program. Priorities include land conservation, land stewardship, education and outreach, and preservation of flora and wild birds. The following are selected grants from the Fund's Discretionary Funds. See page 39 for selected grants from Designated Funds.

Cape Cod Museum of Natural History, Inc., \$4,800

To enhance flora for songbirds on conservation land in the Stony Brook Valley, Brewster

Coalition for Buzzards Bay, Inc., \$5,000

For support of the Nulands Neck Project

Green Mountain Conservation Group, \$5,000

For support of the Trout Pond Conservation Project

The Lobster Conservancy, \$5,000

For support of the Juvenile Lobster Monitoring Program

Orleans Conservation Trust, \$5,000

For support of the Sarah's Pond and Meadow Pond Bog Land Project

The Homelessness Prevention Initiative

This is an effort to champion the cost-effective strategy of preventing of homelessness, by demonstrating the most effective strategies that will keep families and individuals stable in their housing through addressing the wide variety of circumstances that can place them at risk, such as domestic violence, mental illness and substance abuse, or unexpected financial reversals. With its partners—Tufts Health Plan, the Massachusetts Medical Society and Alliance Charitable Foundation, and the Starr Foundation—grants totaling \$1,060,000 were made to 19 organizations. Here are some selected grants:

Bridge Over Troubled Waters, \$45,000

For the Transitional Day Program to prevent homelessness among high-risk youth

Family to Family, \$40,000

For the Homelessness Prevention Partnership, a collaborative of six agencies

Massachusetts Coalition for the Homeless, \$75,000

For the First Stop Initiative

Rosie's Place, \$60,000

For the Non-Residential Support Service Program

Victory Programs, \$52,000

For the Homelessness Prevention Program

The New Economy Initiative

This five-year program is designed to increase digital equity for young people and adults in our community and enable them to succeed in the new economy. The initiative also builds the technology capacity of nonprofit organizations in the area. All of these grants came from the New Economy initiative Fund unless otherwise stated. Here are selected grants from 2005:

Health Care For All, \$50,000

For Massachusetts RealBenefits, an internet-based eligibility and application tool for public benefits to low-income families

Massachusetts Immigrant and Refugee Advocacy Coalition, \$40,000

For Speakeasy: a real-time telephone-based interpretation system that links volunteers to those needing interpretation services

Museum of Science, \$25,000

For a study on a Wireless Boston strategy

South End Technology Center @ Tent City, \$40,000

For the Teach 2Learn-Learn2Teach program for 48 high school students

Timothy Smith Network, \$40,000

For a long-term sustainability plan for a network of 40 community technology centers in Roxbury

Pilot School Initiative

This initiative is designed to support Boston public schools interested in exploring the Pilot school model. Like charter schools, Pilot schools have flexibility in hiring, scheduling, work rules and budgeting. In FY2005 the Foundation made three additional implementation grants to each of the following schools:

Baldwin Early Learning Center

Lee Academy Pilot School

Samuel W. Mason Elementary School

SkillWorks

SkillWorks is the single largest public/private investment in workforce development in Boston's history. SkillWorks seeks to change the way employers hire and promote entry-level workers from Boston's neighborhoods by encouraging employer-driven partnerships with community training organizations. Funding partners include the City of Boston, the Commonwealth of Massachusetts and other local and national funders. These grants were made in 2005:

Asian American Civic Association, \$330,000

International Institute of Boston, \$330,000

Jamaica Plain Neighborhood Development Corporation, \$330,000

Management Consulting Services, \$75,000

Partners HealthCare, \$330,000

Voice and Future Fund, \$330,000

The Women's Union, \$330,000

Out of the Blue Grants

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

Building Educated Leaders for Life (BELL)

Committee to End Elder Homelessness, Inc.

Greater Boston Legal Services, Inc.

Madison Park Development Corporation—ACT Roxbury Consortium

Boston Foundation Advisory Groups

In the Boston Foundation's continuing campaign to bring new voices and community expertise to its work, a number of special task forces and committees inform our work in the areas of arts and culture, community safety, education, the environment, health care, housing and economic development, homelessness prevention, the new economy, and workforce development. The Boston Indicators Project also has a leadership group that guides its work and progress.

These groups vary in size and mission, but not in importance. As of the printing of this report, the following people were engaged in advising our work.

We are grateful for their commitment of time, their experience, and their wisdom.

Arts & Culture Policy Advisory Committee

Louis Casagrande, President, The Boston Children's Museum, *Committee Chair*

Jon Abbott, Executive Vice President, WGBH

Paul Bittenwieser, MD, Psychiatrist; Novelist; Trustee, Boston Symphony Orchestra, Institute of Contemporary Art, and Museum of Fine Arts, Boston

Barbara Casey, Managing Director, Mellon Private Wealth Management; Trustee, Hyams Foundation

Kathleen Cerveny, Senior Program Officer, The Cleveland Foundation

Jim Darr, Senior Fellow, Boston Foundation

George Fifield, Executive Director, Boston Cyberarts

Paul Grogan, President & CEO, The Boston Foundation

Susan Hartnett, Director, Mayor's Office of Arts, Tourism & Special Events

Martha Jones, President & Executive Director, Bank of America Celebrity Series

Mary Kelley, Executive Director, Massachusetts Cultural Council

Jeremy Liu, Executive Director, Asian Community Development Corporation

Michael Maso, Managing Director, Huntington Theatre Company

Charlie McDermott, Deputy Director, Massachusetts Cultural Council

Ann McQueen, Senior Program Officer, The Boston Foundation

Jill Medvedow, James Sachs Plaut Director, Institute of Contemporary Art

Samuel Miller, President, Leveraging Investments in Creativity (LINC)

Margaret H. Morton, Senior Vice President-Program, the Fidelity Foundations

Jeffrey Poulos, Executive Director, StageSource

Gil Rose, Artistic Director, Boston Modern Orchestra Project

J. Mark Schuster, Professor, Department of Urban Studies and Planning at MIT

Klare Shaw, Senior Associate, Barr Foundation

Holly Sidford, Consultant, Leveraging Investments in Creativity (LINC)

Candelaria Silva, Director, ACT Roxbury Consortium

Katherine Sloan, President, Massachusetts College of Art

Edmund Toomey, Chief Operating Officer, Lesley University

Clara Wainwright, Artist/Producer, Faith Quilts Project

Community Safety Advisory Committee

Frank Hartmann, Executive Director and Senior Research Fellow, Program in Criminal Justice, *Committee Chair*

Cathleen Bennett, Director of Training, Committee for Public Counsel Services

Pat Bradley, Assistant Secretary, Executive Office of Public Safety

Angela Browne, Adjunct Lecturer, Department of Health Policy and Management, Harvard School of Public Health

Christine Coles, Chief of Staff, Executive Office of Public Safety

Shirley Fan, Executive Director, Asian Task Force Against Domestic Violence, Inc.

Robert Gittens, Vice President of Public Affairs, Northeastern University

Rev. Ray Hammond, Pastor, Bethel AME Church, Boston Foundation Board Chair

Scott Harshbarger, Former Massachusetts Attorney General, Head of Harshbarger Governance Practice, Murphy, Hesse, Toomey & Lehane, LLP

Frank Hartmann, Executive Director, Criminal Justice Policy and Management, John F. Kennedy School, Harvard University

Michael Kozu, Community Coordinator, Project R.I.G.H.T

Tracy Lithcut, Senior Coordinator, Office of High School Renewal

Doug Lomax, Substance Abuse Coordinator, Boston Municipal Court
Jennifer Machonochie, Director, Office of Strategic Planning and Resource Development,
Boston Police Department
Ralph Martin III, Former District Attorney, Suffolk County and Partner,
Bingham McCutchen LLP
Jack McDevitt, Director, Center for Criminal Justice Policy Research, Northeastern
University
Gloria Cross Mwase, Coordinator, Making Connections, Annie E. Casey Foundation
Kathleen O'Toole, Commissioner, Boston Police Department
Rev. Eugene F. Rivers III, Chairman, National Ten Point Leadership Foundation
Willie Rodriguez, Executive Director, La Alianza Hispana, Inc.
Milton L. Wright, Jr., Presiding Justice, Roxbury District Court

Education Advisory Committee

James Darr, Senior Fellow, The Boston Foundation, *Committee Chair*
Carol Anderson, Boston Foundation Board Member
William Boyan, Former President and COO, John Hancock Financial Services;
member, Boston School Committee
Linda Brown, Executive Director, Building Excellent Schools
Chris Coxon, Deputy Superintendent, Teaching and Learning, Boston Public Schools
Donald Davies, Professor Emeritus of Education, Boston University
Charles Desmond, M.D., Associate Vice Chair for Schools and Collaboration,
University of Massachusetts Boston, Graduate College of Education
Ellen Guiney, Executive Director, The Boston Plan for Excellence
Marc Kenen, Mass Charter School Association
Karen Mapp, Deputy Superintendent for Family and Community Engagement,
Boston Public Schools
Claudio Martinez, Executive Director, Hyde Square Task Force
Kenneth Novack, Of Counsel, Mintz Levin Cohn, Ferris, Glovsky and Popeo
James Peyser, Chairman, Massachusetts Board of Education
Jacqueline Rivers, Executive Director, Math Power
Robert Schwartz, Harvard Graduate School of Education
Klare Shaw, Senior Associate, The Barr Foundation
Pamela Trefler, President, Trefler Foundation
Miren Uriarte, M.D., Research Associate Gaston Institute, UMass Boston

Fund for the Environment Advisory Committee

Jennifer Bender Ferre, Board Member, New England Aquarium
Trudy Coxe, Chief Executive Officer, Preservation Society of Newport County
Alan French, Chairman, Bay Circuit Alliance
Kate Guedj, Vice President for Philanthropic & Donor Services, The Boston Foundation
Kathryn Kilguss, Past President of the Board, Save the Bay
Binkley C. Shorts, Senior Vice President, Wellington Management Company, LLP
Freda Swan, Advisory Council, Upper Valley Land Trust
Gregg H. Swanzey, Executive Director, Schooner Ernestina Commission
Emily V. Wade, President, Museum Institute for Teaching Sciences
Alan Wilson, Past Vice President, CLF Ventures, Conservation Law Foundation

Health Care Advisory Committee

Jackie Jenkins-Scott, President, Wheelock College, *Committee Co-Chair*
Malcolm Sherman, Chairman, Gordon Brothers Group, *Committee Co-Chair*
Stuart Altman, Professor of National Health Policy, Brandeis University
Hortensia Amaro, Ph.D., Director, Institute on Urban Health, Northeastern University
John Auerbach, Executive Director, Boston Public Health Commission
Harris Berman, M.D., Dean, Public Health and Professional Degree Programs,
Tufts University School of Medicine
Elizabeth Childs, M.D., Commissioner, MA Department of Mental Health
Lula Christopher, Executive Director, Boston Black Women's Health Institute
James Hunt, President & CEO, MA League of Community Health Centers
Peter Koutoujian, Representative and Chair, Healthcare Committee, MA House of
Representatives
James Mandell, M.D., President and CEO, Children's Hospital
John McDonough, Executive Director, Health Care for All
Joyce Murphy, President, Caritas Carney Hospital
David Nathan, M.D., President Emeritus, Dana Farber Cancer Institute
Deborah Prothrow-Stith, M.D., Associate Dean, Harvard School of Public Health
Valerie Sullivan, Director of Marketing, Pfizer Pharmaceuticals Group
Judy Swahnberg, Board Member, Kenneth B. Schwartz Center
Jacob Smith Yang, Executive Director, MA Asians and Pacific Islanders for Health
Azzie Young, Ph.D., Executive Director, Mattapan Community Health Center

Homelessness Prevention Advisory Committee

Cindy Rizzo, Senior Program Officer, The Boston Foundation, *Committee Chair*

Robyn Alie, Manager, Massachusetts Medical Society and Alliance Charitable Foundation

Susanne Beaton, One Family Campaign Director, One Family, Inc.

Ed Sanders-Bey, Assistant Commissioner, Massachusetts Department of Transitional Assistance

Carol Collins, Director of Housing Management, Massachusetts Department of Housing and Community Development

Jennifer Day, Manager, Massachusetts Medical Society and Alliance Charitable Foundation

Elizabeth Doyle, Assistant Director for Housing Development, Department of Neighborhood Development, City of Boston

Joseph Finn, Executive Director, Massachusetts Housing and Shelter Alliance

Donna Haig Friedman, Ph.D., Director, Center for Social Policy Research, University of Massachusetts Boston

Robyn Frost, Executive Director, Massachusetts Coalition for the Homeless

James Greene, Shelter Commissioner, City of Boston

Julia Kehoe, Executive Director, Metropolitan Boston Housing Partnership

Anne Marie Boursiquot King, Manager, Community Partnerships and Volunteerism, Tufts Health Plan

Margaret Leonard, Executive Director, Project Hope

Paul Nixon, Housing Management Specialist, Massachusetts Department of Housing and Community Development

Alison Rice, Director of Family Housing Services, Housing Assistance Corporation

Marc Slotnick, Associate Director, Public Housing and Rental Assistance, Massachusetts Department of Housing and Community Development

Toni Abrams Weintraub, M.D., Assistant Medical Director, Tufts Health Plan

Housing and Economic Development Advisory Committee

Eleanor White, President, Housing Partners, Inc., *Committee Chair*

Amy Anthony, President, Housing Investments Inc.

Barbara Berke, Consultant

Barry Bluestone, Director, The Center for Urban and Regional Policy, Northeastern University

Rachel Bratt, Professor, Department of Urban and Environmental Policy and Planning, Tufts University

Eva Clarke, Executive Director, Mattapan Community Development Corporation

Larry Curtis, Managing Partner, Winn Development

Aaron Gornstein, Executive Director, Citizens Housing & Planning Association

Albert J. Kaneb, Chairman and CEO, Barnstable Broadcasting, Inc.

Mossick Hacobian, Executive Director, Urban Edge Development Corporation

Sandra Henriquez, Director, Boston Housing Authority

Langley Keyes, Professor of City and Regional Planning, Department of Urban Studies, MIT

Joe Kriesburg, President, Massachusetts Association of Community Development Corporations

Robert H. Kuehn, Jr., President, Keen Development Corporation

Alvaro Lima, Director of Research, Boston Redevelopment Authority

Joanne Massaro, Director of Operations, Department of Neighborhood Development, City of Boston

Nelson Merced, Director of National Initiatives, NeighborWorks

Jeanne Pinado, Executive Director, Madison Park Community Development Corporation

Stephanie Pollack, Consultant

Robert L. Pyne, Director of Rental Development, MassHousing

David Squire, Vice Chair, MassDevelopment

Matt Thall, Senior Program Director, Local Initiatives Support Corporation

Sarah Young, Deputy Director for Policy Development, Department of Housing and Community Development

The New Economy Initiative Steering Committee

Geeta Pradhan, Program Director, The Boston Foundation, *Committee Chair*

David Altshuler, Founder and CEO, TechFoundation

Professor Nolan Bowie, Adjunct Lecturer in Public Policy, John F. Kennedy School of Government, Harvard University

Holly M. Carter, Ph.D., Director, Community Technology Centers Network

Cathleen Finn, Community Relations Program Manager, IBM

Jonathan Guerster, Principal, Offshore View

Deborah C. Jackson, CEO, American Red Cross of Massachusetts Bay

Alice Jelin, Executive Director, Massachusetts Software Council Education Foundation

Lewis Karabatsos, Director, U.S. Strategy and Operations, Hewlett-Packard Company

Cesar McDowell, Director, Center for Reflective Community Practice, M.I.T

Marc Osten, Principal, Summit Collaborative Partners

Mary Rafferty, Regional Director, Verizon Foundation

Carol J. Ramsey, Director, Corporate Relations, Raytheon Company

Gregory Sheldon, Chair, MTC Workforce Development Committee, Massachusetts Telecommunications Council

Neil Sullivan, Executive Director, Boston Private Industry Council

The SkillWorks Funders Group

Angel H. Bermudez, Senior Director of Grantmaking and Special Projects,
The Boston Foundation, *Committee Chair*

Henry Allen, Senior Program Officer, The Hyams Foundation

Ken Barnes, Deputy Director for Planning and Policy Development, Mayors' Office of Jobs
and Community Services

Sue Beaton, Director, One Family Campaign/Fireman Foundation

Angela Brown, Program Officer, The Hyams Foundation

Annie Chin-Louie, Director, Community Investments, United Way of Massachusetts Bay

Gloria Cross Mwase, Local Site Coordinator, Annie E. Casey Foundation

Conny Doty, Executive Director, Mayor's Office of Jobs and Community Services

Sharon Driscoll, Vice President, Bank of America Private Bank

Christie Getto Young, Public Policy Manager, United Way of Massachusetts Bay

Carol Glazer, Consultant, The Rockefeller Foundation

Jennifer James, Director of Interagency Initiatives Department of Workforce Development,
Commonwealth of Massachusetts

Melinda Marble, Executive Director, One Family Campaign/Fireman Foundation

Rowan Murphy, Program Consultant, The John Merck Fund

Dan Singleton, Deputy Director of Adult Services, Mayor's Office of Jobs and Community
Services

The Boston Indicators Project Leadership Group

Robert Gittens, Vice President, Public Affairs, Northeastern University, *Co-Chair*

Joyce Plotkin, President, Mass Technology Leadership Council, *Co-Chair*

Stephen Adams, Regional Advocate, Region I Office of Advocacy, U.S. Small Business
Administration

Geoff Beckwith, Executive Director, Massachusetts Municipal Association

Margaret Blood, President, Strategies for Children, Incorporated

Barry Bluestone, Director, Center for Urban and Regional Policy, Northeastern University

Ian Bowles, Executive Director, MassINC

Valerie Burns, President, Boston Natural Areas Network

Maria Cheevers, Project Director, The Female Focus Initiative, Roxbury YouthWorks

John Ciccarelli, Assistant to the Chancellor for Economic Development, University of
Massachusetts, Boston

Stephen Crosby, Publisher, Cable in the Classroom

Gloria Cross Mwase, Coordinator, Making Connections Boston, Annie E. Casey Foundation

Robert Culver, President, MassDevelopment

Curtis Davis, Senior Project Advisor, MetroFuture, Metropolitan Area Planning Council

Marc Draisen, Executive Director, Metropolitan Area Planning Council

Mary Fifield, President, Bunker Hill Community College

Paul Grogan, President and CEO, The Boston Foundation

Ronald Homer, President, Access Capital Strategies

Cheng Imm Tan, Director, Office of New Bostonians

Marion Kane, Executive Director, The Barr Foundation

Kathleen Kelley, President, Massachusetts Federation of Teachers

Terry Lane, Vice President for Program, The Boston Foundation

David Lee, Vice President, Stull & Lee, Incorporated

Vanessa Leong, Senior Community Relations Specialist, Raytheon Company

Vivien Li, Executive Director, Boston Harbor Association

Alvaro Lima, Director of Research, Boston Redevelopment Authority

David Luberoff, Executive Director, Rappaport Institute, John F. Kennedy School of
Government, Harvard University

Melinda Marble, Executive Director, The Paul and Phyllis Fireman Charitable Foundation

Larry Mayes, Chief of Human Services, City of Boston

Peter Meade, Vice President, Corporate Affairs, Blue Cross/Blue Shield of Massachusetts

Mary Jo Meisner, Vice President for Community Relations, Communications and Public
Affairs, The Boston Foundation

Keith Motley, Vice President for Business Affairs at the Office of the President,
University of Massachusetts

Mary Ostrem, Director of Research, Boston Public Health Commission

Stephanie Pollack, Center for Urban and Regional Policy, Northeastern University

Tina Rice, Assistant Director, Corporate and Government Affairs, Carroll School of
Management, Boston College

Arnold Rosoff, Founder, Arnold Worldwide

Lukas Ruecker, Vice President, US Strategy and Planning, Staples, Incorporated

John Schneider, Director, New Skills for a New Economy Awareness & Action Campaign,
MassINC

Cathleen D. Stone, Special Assistant to the Mayor for Special Projects, City of Boston

William Walczak, Executive Director, Codman Square Health Center, Inc.

Applying for a Grant



The Boston Foundation invests in nonprofit organizations in order to build a vibrant, cohesive and interconnected community that provides access to fundamental resources and opportunities for all citizens. Nonprofit organizations are essential partners in the task of creating a livable metropolitan area that is the center of new ideas and opportunity. Boston Foundation grants help them to generate and implement innovative projects, grow proven programs to significant scale, respond to changing times and circumstances, and address barriers to equal opportunity.

As a community foundation, the Foundation has a special responsibility to support a broad range of activities that strengthen the fabric of communities in Greater Boston. The Foundation supports organizations and programs working in a wide variety of subject areas that include: Arts & Culture; Civic Engagement; Education/Out-of-School Time; Health & Human Services; Housing & Community Economic Development; Urban Environment; and Workforce Development.

The Foundation makes grants from its Discretionary Funds on a semi-annual basis. Discretionary Funds are largely unrestricted, and allow the Boston Foundation the greatest degree of flexibility in grantmaking. They include the Community Fund (the largest unrestricted fund), Named Funds (established to honor a person or organization), and Field of Interest Funds, which focus on general areas of interest.

Who Can Apply?

The Boston Foundation welcomes applications from organizations in the Greater Boston area that are tax exempt under section 501(c)(3) of the Internal Revenue Code. If a project is new and not yet tax exempt, an application may be submitted through a nonprofit organization that has agreed to serve as a fiscal agent.

Types of Grants

Generally, the Boston Foundation makes the following types of grants:

Project or program support for community-based efforts that improve the quality of life in our community, test new models and promote collaborative and innovative ventures;

Organizational support to develop and build the capacity of nonprofit organizations; support that helps organizations keep pace with the changing requirements and demands of their communities and broader environments; and

Support for planning to enable organizations and residents to assess community needs, respond to new challenges and opportunities, and provide for the inclusion of new populations.

Guidelines and Deadlines

- 🍷 The Boston Foundation has two proposal deadlines each year for grants from general Discretionary Funds.
- 🍷 The application process has two stages, requiring applicants to submit a Pre-Application Form about 10 weeks in advance of the proposal submission deadline. The Foundation will then invite full proposals from applicants whose work best advances TBF's priorities and goals.
- 🍷 The two deadlines for Pre-Application are July 1 and January 5.
- 🍷 The Foundation will invite submission of full proposals based on its review of the Pre-Application Form, but will not consider uninvited proposals.
- 🍷 The Foundation does not accept concept papers.

Special Initiatives

The Foundation plays a leadership role in developing focused initiatives in key areas where more intensive involvement has the potential for significant impact. Initiative funding is announced through a Request for Proposal (RFP) process, and widely communicated to the community. Initiative information is always posted on the Foundation's website at www.tbf.org.

For More Information Visit Our Website

There is detailed grantmaking information on TBF's website, including the on-line Pre-Application Form. The website also contains information about higher and lower funding priorities in each of TBF's grantmaking sectors and priorities for specific populations. Those organizations interested in applying for funding are strongly encouraged to visit the website at www.tbf.org, where extensive information is available about every aspect of TBF's grantmaking process. Interested organizations may also call the Foundation at 617-338-1700 for more information.

Establishing a Fund

Boston Foundation donors want to make a real difference with their philanthropy, and they know that the Boston Foundation has the capacity to help them do just that. The Foundation offers a variety of fund options to meet donors' needs—from flexible funds that can be used to benefit Greater Boston to Donor Advised Funds that engage donors who want to be actively involved in their giving.

It's quick and easy to establish a fund at the Boston Foundation—even if gifts are complicated, such as gifts of restricted stock or real estate. And as the partnership with the Boston Foundation deepens, donors have access to some of the most exciting information and events about today's Greater Boston community.

Endowing Boston

To benefit this community, now and for future generations, many donors choose to establish a charitable legacy that will carry their name and charitable interests in perpetuity. Donors can choose from three basic types of funds.

The Community Fund

An unrestricted gift to Boston's primary endowment, the Community Fund, can be made with the knowledge it will always be applied to the most pressing community needs by a staff that is in close touch with the issues challenging Greater Boston.

Field of Interest Funds

By establishing a Field of Interest Fund, donors can focus their gift on the area of community life that they care about most—such as promoting excellence in education for all children, addressing the health care needs of the most needy, or supporting arts and culture.

Designated Funds

A Designated Fund allows donors to provide annual support to organizations in Greater Boston or across the United States that have made a difference in their lives and the lives of loved ones.

The Civic Leadership Fund at the Boston Foundation

The Civic Leadership Fund fuels the 'beyond grantmaking' work of the Boston Foundation—including researching problems that are challenging Greater Boston, bringing people together to exchange information and ideas, encouraging cross-sector partnerships, and creating action plans for change in areas like affordable housing, workforce development, and education.

Donor Advised Funds

Donor Advised Funds operate much like private foundations, but without the administrative burdens or paperwork. Donors are able to make contributions to nonprofit organizations anywhere in the United States—even internationally. And, for those who want some assistance with their giving, Boston Foundation donors have access to a knowledgeable and experienced staff that can help guide their giving as little or as much as they would like.

The Many Ways of Giving

Donors can work with the Boston Foundation to maximize their financial opportunities for themselves, their heirs—and the charitable causes they care about most. The Boston Foundation offers a full range of ways of giving:

Cash Contributions

Cash is the easiest way to establish a fund or add to an existing fund.

Gifts of Appreciated Assets

Stocks and bonds, including restricted stock, pre-IPO stock, mutual funds, certain closely-held stock and readily marketable real estate—a wide variety of assets may be used to establish a fund, add to a fund or create a planned or legacy gift.

Assets from a Private Foundation

A private foundation can make a grant to any fund at the Boston Foundation or transfer its assets to a Donor Advised Fund and ease the administrative burden—with the option of co-investing with the Boston Foundation on local grants.

Planned and Legacy Giving

The Boston Foundation offers many creative ways to incorporate charitable giving into estate planning. Planned and legacy giving is an excellent way to establish a charitable legacy, while realizing significant financial and tax benefits. These are the basic options.

- ♥ Gifts by Will or Trust
- ♥ Gifts of Retirement Plan Assets and Life Insurance
- ♥ Gifts That Pay an Income
- ♥ Gifts That Preserve Assets for Heirs

Philanthropic and Donor Services

An entire department at the Boston Foundation is dedicated to working with donors to make their philanthropy as effective and fulfilling as possible. Staff members help donors identify organizations and programs that will benefit most from their support

and offer opportunities to ‘co-invest’ in effective and timely programs already receiving grants from the Foundation. Donors are invited to special briefings on topics of current interest with leaders in the field—and given the opportunity to become involved on a series of levels with the civic leadership work of the Foundation.

Advantages of Partnering with the Boston Foundation

Like many other excellent gift fund services, the Boston Foundation offers:

- ♥ Simplicity and speed in opening and maintaining a fund;
- ♥ Maximum tax benefits;
- ♥ Online grantmaking and fund services;
- ♥ Investment expertise and enhanced investment returns; and
- ♥ Anonymity.

The Boston Foundation also provides our donors with so much more:

- ♥ Personalized philanthropic and donor services, with a staff ready to meet donors’ needs and answer all of their questions about grantmaking;
- ♥ Experts in all of the major areas of community life in Greater Boston and across the country;
- ♥ Invitations to Understanding Boston forums and access to leading-edge research about our community;
- ♥ A full range of planned and legacy giving opportunities; and
- ♥ Connection to an ‘extended family’ of donors and civic leaders who are dedicated to making Greater Boston as great as it can be.

For more information about establishing a fund or making a planned or legacy gift, call the Development Office at 617-338-1700 or visit the Foundation’s website at www.tbf.org and choose Become a Donor.

Boston Foundation Funds

*Y*oung high tech professionals and retired senior citizens, volunteers and heads of major corporations, bankers, artists, doctors, venture capitalists, lawyers and teachers. Individuals, entire families and the boards and staffs of for-profit businesses and nonprofit organizations. A remarkably wide range of people have established and contributed to funds at the Boston Foundation over the last 90 years.

Some Boston Foundation donors are carrying on a tradition established by their families and even ancestors. Others are new to the world of philanthropy, and just beginning to shape their giving philosophy.

A growing number are rolling up their sleeves and actively participating in the areas of community life about which they are most passionate—and in the process taking advantage of the Foundation’s extensive knowledge about the Greater Boston community.

The following pages include lists of all funds held by the Foundation, beginning with those that were established during 2005. Each fund has its own name, purpose and history, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston’s community foundation for today and the future.



56 New Funds Were Established in 2005

We gratefully acknowledge the generous community-minded people who established new funds at the Boston Foundation during 2005.

The following list includes Discretionary Funds, Designated Funds and Donor Advised Funds.

Discretionary Funds

Alzheimer's Disease Research Foundation
East Boston Chelsea Creek Fund

Designated Funds

Sybil F. Stone Arts Scholarship Fund

Donor Advised Funds

A & E Educational Quest Fund
AADS Memorial Fund
Acacia Fund
Agatha Fund
Anthos Family Fund
Ausschnitt Fund
Kathryn and Charles Avison – Miriam
Avison Charitable Fund
Charlotte Saltonstall Bigham Memorial Fund

Bitpipe Legacy Fund
Timothy and Kathryn Conway Charitable
Fund
Cregan Charitable Fund
Joe DiGeronimo Charitable Fund
Phyllis and Jimmy DiGeronimo Fund
Dillon Fund
Lesser Eber Fund
Eisenson Family Fund
Jack Florey Fund
Florin Family Charitable Fund
Rich Florin Family Fund
Sherley Gardner-Smith Charitable Gift Fund
Albert Francis Gilmartin Memorial
Scholarship Fund
Jay Habegger and Christine Nagle Fund
W.J. Hannigan Family Fund

Herzog Family Charitable Fund
Hobart / Toole Charitable Fund
Robert Hooper Family Fund
Iron Mountain Education Fund
Stephen and Caroline Kaufer Charitable
Giving Fund
Mr. and Mrs. Raymond B. Keefe
Memorial Fund
Khudari Fund
M. R. Kidder Charitable Fund
Kidder SBSM (Strong Body, Strong Mind)
Fund
M. Volpe Kluchman Fund
Knopf Family Charitable Fund
G. Barrie Landry Fund
Microsoft Unlimited Potential Fund
Mid-Century Fund

Gabrielle J. Miller Donor Advised Fund
Sykes Moyer Fund
Myrtle Field Fund
Tami E. Nason & Kent A. Lage Fund
New Beginnings/Kidder Hildner Fund
Thomas Perls Fund
Kevin Phelan Fund
Colette Phillips Scholarship Fund
Roberts-Belove Fund
Margaret M. Schmidt and Kenneth J.
Danila Fund
Schumann Family Fund
Sherman Family Foundation Fund
Lee J. Strauss Fund
Susan and Michael Thonis Fund
Scott and Jennifer Tobin Charitable Fund
Weiss Charitable Fund

New Donors to the Community Fund

The Community Fund is the most flexible Discretionary Fund held by the Foundation, because it places no restrictions on the way the income may be used, and gives our Staff and Board of Directors the resources to respond to the most critical issues facing Greater Boston today and tomorrow.

These gifts to the Community Fund were received during 2005 and are gratefully acknowledged.

Individuals, Charitable Funds, Corporations and Foundations

Fleet Bank
Gillette Company
Ms. Helen Jones

Francis Ward Paine Foundation, Inc.
Matthew J. & Gilda F. Strazzula Foundation
Ms. Hungwah Yu and Mr. David J. Elliott

Estates & Trusts

Donald Gregg Trust u/Will
Elizabeth D. Herteli Trust
Vladimir N. Herteli Trust

Estate of Elizabeth B. Hough
Joyce E. Irving Revocable Trust
Mason Charitable Remainder Annuity Trust

Donors to the Civic Leadership Fund

This fund provides fuel for the Boston Foundation's increasingly strong role as a civic leader, including its research, convenings, task forces, and action agendas addressing the most compelling issues facing our city and region.

Abt Associates	Mr. Ferdinand Colloredo-Mansfeld	Fish Family Foundation	Ms. Katherine B. Hood
Adams Harkness	Combined Jewish Philanthropies of Greater Boston, Inc.	Fleet Matching Gifts Program	Hunt Alternatives Fund
Alzheimer's Disease Research Foundation	Ms. Jill K. Conway	Fleet Charitable Gift Fund	Mr. Brian Hyde and Mr. Joe Fiorello
Carol and Howard Anderson Family Fund at the Boston Foundation	Cooper Leeser Fund at the Boston Foundation	Mr. Laurence B. Flood	Mr. and Mrs. Ira A. Jackson
Axiom International Investors	Constance and Lewis Counts Fund at the Boston Foundation	Drs. Robert H. and Rochelle R. Friedman	Jeffrey Jones, Esq.
Beacon Capital Partners	Mr. Richard Dagen	Ms. Susan Y. Friedman	Martin S. Kaplan, Esq.
Mr. Robert L. Beal	Dainger Fund at the Boston Foundation	Fulkerson Family Fund at the Boston Foundation	Michael B. Keating, Esq.
Dr. and Mrs. James Beck	Ms. Catherine D'Amato	Mr. Allan W. Fulkerson	The Kelyn Group, LLC
Mr. Jeffrey Bilezikian	Dammann Boston Fund at the Boston Foundation	Gabrieli Family Fund at the Boston Foundation	William and AnnMarie Kennedy
Mr. Mark Blaxill	Mr. Richard and Ms. Tracey Davis	Robert and Linda Glassman Fund at the Boston Foundation	Steven and Paula Koppel
Blue Cross & Blue Shield of Massachusetts	Mr. Edward and Mrs. Paula DeMore	Carol R. & Avram J. Goldberg Fund at the Boston Foundation	Kravitz Family Fund at the Boston Foundation
Joan Bok Fund at the Boston Foundation	Denterlein Worldwide	Rachael P. & Andrew P. Goldfarb Fund at the Boston Foundation	Terry and Jonathan Lane
The Boston Company	DeWolfe Family Fund at the Boston Foundation	Goldman Sachs & Co.	Barbara Lee Family Fund at the Boston Foundation
Boston Globe	Lawrence S. DiCara, Esq.	Goodworks Fund	Liberty Mutual Foundation, Inc.
Boston Herald	Mr. James and Mrs. Janice DiStasio	Gordon Educational Fund at the Boston Foundation	LMG Fund at the Boston Foundation
Mr. and Mrs. F. Gorham Brigham, Jr.	Mr. Ralph J. Donofrio	Grogan Fund at the Boston Foundation	Loomis Sayles & Company, Inc.
Peter A. Brooke Fund at the Boston Foundation	Mr. and Mrs. John E. Drew	Mr. Steven and Mrs. Barbara Grossman	Lovett-Woodsum Family Fund at the Boston Foundation
William T. Burgin Fund at the Boston Foundation	Druker Company, Ltd.	Gualala Fund at the Boston Foundation	Mr. Bernard A. Margolis and Ms. Amanda Batey
Mr. Michael R. Burkom	Eastern Bank Charitable Foundation	Kate and Thierry Guedj	Sydell and Edward I. Masterman Fund at the Boston Foundation
Butler's Hole Fund at the Boston Foundation	Eaton Vance Management	Mr. and Mrs. Paul Guzzi	Mr. Kevin McCall
Catherine and Paul Buttenwieser Foundation	Mr. William S. Edgerly	Hale and Dorr Capital Management LLC	Emily & Bernard H. Mehlman Fund at the Boston Foundation
Louis and Julie Casagrande	Mr. Michael and Ms. Barbara Eisenson	Rev. Ray Hammond and Dr. Gloria Hammond	Ms. Mary Jo Meisner
Ms. Fay M. Chandler	Ronald E. Feldman Trust	John Hancock Life Insurance Company	Merganser Capital Management LP
Charles River Realty Advisors	Fidelity Foundation	Ramelle Hieronymus	Metro Corporation
Citizens Financial Group, Inc.	Fidelity Charitable Gift Fund (4)	Petie Hilsinger Fund at the Boston Foundation	Jack and Beth Meyer
Citizens Bank Foundation	Fiduciary Charitable Foundation		Mill River Foundation Fund at the Boston Foundation
Co-Investment Fund at the Boston Foundation	Paul and Phyllis Fireman Charitable Foundation		

Millennium Partners-Boston
 David and Mary Ellen Moir
 Mr. Herbert E. Morse
 Muddy Pond at the Boston Foundation
 David G. Mugar
 National Development
 New Boston Fund, Inc.
 Mr. and Mrs. Kenneth J. Novack
 Novotny/Swahnberg Fund at the
 Boston Foundation
 Obermayer Foundation, Inc.
 Mr. Thomas L.P. O'Donnell
 Ohrn Family Fund at the Boston
 Foundation
 O'Neill & Associates
 Mr. Ruben D. Orduna and
 Ms. Elizabeth G. Hill
 Parker Family Fund at the
 Boston Foundation

Mr. and Mrs. Thomas Payzant
 Mr. and Mrs. Kevin C. Phelan
 Pitts Family Fund at the Boston Foundation
 Mrs. Elizabeth K. Pozen
 Prime, Buchholz and Associates, Inc.
 The Irving and Charlotte Rabb
 Charitable Foundation
 Rackemann, Sawyer & Brewster
 Remmer-Fox Family Fund at the
 Boston Foundation
 Hanson S. Reynolds, Esq.
 Mr. William G. Rogerson
 Andrew L. & Leslie (George) Ross Fund
 at the Boston Foundation
 Risha C. and Paul A. Samuelson Fund
 at the Boston Foundation
 Mr. Joseph R. Savage
 Schawbel Family Fund at the
 Boston Foundation

Schoen Family Foundation
 Shawmut Design and Construction
 Paula L. and Edwin N. Sidman
 Family Fund
 Richard & Susan Smith Family Foundation
 Snowden - Trimmier Family Fund at the
 Boston Foundation
 Mr. and Mrs. Alan D. Solomont
 Sovereign Bank of New England
 Mrs. Helen Spaulding
 Stephanie H & David A Spina Family
 Foundation
 Micho and William J. Spring
 Squire Family Fund at the Boston
 Foundation
 Stamps Family Charitable Foundation, Inc.
 State Street Bank & Trust Company
 Stone Charitable Fund at the
 Boston Foundation

Richard Talkov & Susan Davies Fund
 at the Boston Foundation
 Mr. and Mrs. Peter Thomsen
 Tishman Speyer Properties
 Topol Family Fund at the Boston
 Foundation
 Travaglini Committee
 Vanguard Charitable Endowment Program
 Verizon Foundation
 Mr. Robert R. Wadsworth
 Wainwright Bank
 R. F. Walsh Company, Inc.
 Mr. and Mrs. Robert W. Weinstein
 Wellington Management Company
 Charitable Fund
 Mrs. Benaree P. and Mr. Fletcher H. Wiley
 Winn Development Company
 Ms. Alice H. Wolpert
 Ms. Hungwah Yu and Mr. David J. Elliott

Planned and Legacy Gifts Received

Many donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad range of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, gifts of retirement plan assets and life insurance, and the Foundation's Pooled Income Fund.

During Fiscal Year 2005, close to \$11 million in planned and legacy gifts were received from the following, which are gratefully acknowledged.

Estate of Emily T. Allen
 Estate of David Avison
 Estate of George P. Beech
 Estate of Pauline S. Germeshausen
 Estate of Albert G. Gilmartin

Donald Gregg Trust u/Will
 Estate of John Hagopian
 Elizabeth D. Herteli Trust
 Vladimir N. Herteli Trust
 Estate of Elizabeth B. Hough

Estate of Francis C. Huvos
 Estate of Samuel Lamar Jordan
 Estate of Arthur R. Kravitz
 Estate of Marian S. Larson
 Mason Charitable Remainder Annuity Trust

Esther Taft Quinn Charitable Lead Annuity
 Trust
 Estate of Patricia Remmer
 Florence Snelling Trust
 Estate of Margaret C. Williams

Rogerson Legacy Society

The Rogerson Legacy Society has been established to recognize and thank those donors who have made arrangements to support the work of the Boston Foundation through a planned gift to benefit a variety of charitable funds. The following donors are current members of the Society.

Howard and Carol Anderson	Marian M. Ferguson	John H. Livens	Charles R. Schroeder
Geoffrey D. Austrian	June M. Ficker	Dunbar Lockwood, Jr.	Annabelle W. Shepherd
Theodore S. Bacon, Jr.	Edward S. Fleming	Hugo Logemann, Jr.	Binkley and Paula Shorts
Sherwood E. Bain	Americo J. Francisco	Donald J. and Susan Kelley MacDonald	William F. Spang
Mary Barber	Walter Eugene Geier	Myron and Barbara Markell	David F. Squire
Allen I. Barry	Robert J. Glaser, M.D.	Alice McGrath	Arthur L. Stevenson
Martha L. Bass	Samuel A. and Pauline S. Groves	Edward J. and Jane S. Michon	Ellen Stillman
Beryl H. Black	Thomas Hale	Robert Minnocci	Anne B. Stone
David Blot	Charlotte I. Hall	Charles Fessenden Morse	George W. Thorn, M.D.
Kenneth S. Brock	Mrs. Chester Hamilton	Donald M. Morse	Libby and Sidney Topol
Seth N. Brockway	Marilyn L. Harris	Frederick W. Neinas, M.D.	Alan and Pamela Trefler
Jacob F. and Barbara C. Brown	Ann S. Higgins	Mary Greene Nelson	David F. Tuttle, Jr.
A. Page Browne, Jr.	Kenneth D. and Cynthia L. Holberger	Mark A. and Judith A. Osborne	Joy E. Van Buskirk
Beryl H. Bunker	Chuck and Gayle Holland	Nancy E. Peace	Henry Walter
George E. Burden	Marjorie Howard-Jones	Drs. Robert A. and Veronica S. Petersen	Gordon Weil, Jr.
Margaret A. Bush	Richard O. Howe	Agatha W. Poor	Elizabeth A. Wheeler
Frank and Ruth Butler	Brian Hyde and Joe Fiorello	Nathaniel Pulsifer	Stetson Whitcher
Robert B. Canterbury	Jane Wegscheider Hyman	Glendora M. Putnam	Constance V. R. White
Margaret J. Clowes	Donald G. Irving	Irving W. Rabb and Charlotte F. Rabb*	Michael N. and Mary M. Wood
Frances F. Connelly	David Jeffries	Warren Radtke and Judith Lockhart Radtke	Eleanor D. Young
Elizabeth D. Coxe	Stephen G. and Rosemarie Torres Johnson	Richard L. Robbins	
Diane Currie (to benefit the Diane Currie Wildlife Fund)	Helen M. Jones	Sumner and Helen Rodman	
Elizabeth T. Damon	Karen Joyce and John Fitzgerald	Eleanor L. Ross	
Harriet E. Dolan	Ms. Ruth G. Kahn	Edith M. Routier	
Joy G. Dryfoos	Mr. Andrew M. Kamarck	Jordan S. Ruboy, M.D.	
Malcolm Dunkley	Gary P. and Susan Kearney	Beverly H. Ryburn	
Knight Edwards	Phyllis Kleban	Anthony Mitchell Sammarco	
Mary C. Eliot	Shirley G. Lagrenade	Mary L. Schaffner	*deceased
	Frances J. Lee-Vandell	Ruth Gessner Schocken	

Discretionary Funds

Many donors have established funds that are totally unrestricted or have broad purposes, giving TBF flexibility in the way the income is used. These are primary funds for which Greater Boston area nonprofit organizations may apply. They provide support to programs that address a broad range of community needs. The following is a list of all Discretionary Funds established at the Boston Foundation over the last 90 years.

The Community Fund

Donors to the Community Fund want to address the needs that people of Greater Boston have today—and give TBF the resources to meet future needs as well. The following list includes donors who have made gifts totaling more than \$5,000 to the Community Fund, with the year of their first contribution noted in parentheses.

Individuals, Corporations and Foundations

Barr Foundation (2004)	Donald J. Hurley Memorial Fund (1978)	William L. Birely (1959)	Donald Gregg (1963)
Mr. and Mrs. Peter Brooke (1994)	Jane W. Hyman (2002)	Edmund Bridge (1933)	Patricia Grisham (1964)
The Boston Company (1991)	Dr. & Mrs. Arthur R. Kravitz (1987)	Frederick W. Bridge (1942)	Joseph Guild (1964)
Henry Burkhardt, III (1986)	Mr. and Mrs. Gael Mahony (1982)	Jesse F. Burton (1971)	John Hagopian (2002)
Catherine and Paul Buttenwieser Foundation (2003)	The Overbrook Foundation (1991)	Susan Cabot (1947)	Ellen Page Hall (1931)
William Putnam Cabot (1970)	Francis Ward Paine Foundation, Inc. (1982)	Charles T. Carruth (1983)	Dorothy C. Harris (1967)
Dorothy Jordan Chadwick Fund (2002)	Harry & Minnie Rodwin Memorial Fund (1975)	Gladys Chiquoine (1983)	Elizabeth M. Hay (1972)
Michael F. Cronin (2004)	Dr. W. Davies Sohler, Jr. (1990)	Helen A. Claflin (1992)	Fred R. Hayward (1969)
Lawrence and Susan Daniels Family Foundation (2003)	Mrs. Helen Spaulding (1992)	William H. Claflin (1983)	Elizabeth D. Herteli Trust (2005)
Wm. Arthur Dupee Memorial Fund (1984)	Matthew J. & Gilda F. Strazzula Foundation (2000)	Winifred I. Clapp (1990)	Vladimir H. Herteli Trust (2005)
Virginia Ellis Memorial Fund (1976)	Gertrude T. Taft (1956)	Horace W. Cole (1992)	Anna P. Hills (1969)
Leon R. Eyges Memorial Fund (1963)	Tech/Ops, Inc. (1982)	Anastasia Conte (1988)	Agnes G. Homes (1961)
George R. Farnum (1982)	United Asset Management Corporation (1994)	Arthur S. Cummings (1943)	Adeline D. Hooper (1973)
First National Bank of Chicago (1988)	Estates	Charlotte E. H. Curtis (1940)	Mary Frothingham Hooper (1961)
Martha M. Fosdick Fund (1978)	Alice A. Abbott (1967)	Maria Corinne Dana (1963)	Elizabeth B. Hough (2002)
John Lowell Gardner Fund (1987)	Matilda S. Alley (1964)	Luisita L. Denghausen (1990)	Elizabeth B. Hurley (2000)
Grand Bostonians Dinner (1984)	Miriam S. Alley (1965)	Kenneth S. Domett (1960)	Frances A. Jordan (1978)
Mrs. Jean Hanlon (1991)	Margaret Sears Atwood (1970)	Mary Frances Drown (1929)	Paul Kimball (1964)
Haymarket People's Fund (1994)	Margaret E. Babcock (1973)	George H. Eastman (1971)	James G. Knowles (1982)
HBB Foundation (1995)	Annie O. Baldwin (1953)	Benjamin Fisher (1996)	Ida Fales Lamb (1967)
Katherine B. Hood (2000)	Wilbert S. Bartlett (1969)	Edith R. Fottler (1948)	James Longley (1918)
	Reginald Benting (1984)	Alma L. Frost (1948)	Clara N. Marshall (1943)
		Anna C. Frothingham (1941)	Ann G. McFarlane (2000)
		Forrest C. Gates (1970)	Arthur W. Moors (1950)
		Mary M. Geist (1982)	John Wells Morss (1940)

John Adams Paine (1967)
 Winthrop D. Parker (1967)
 Annie S. Penfield (1979)
 Blanche E. Philbrick (Merchant E. Philbrick Fund) (1965)
 Mary N. Phillips (1974)
 J. Christie Pingree (1957)
 Carrietta W. Proverbs (1984)
 Bertha J. Richardson (1975)
 Frank L. Richardson (1975)
 Mabel Louise Riley in memory of Charles Edward (1972)
 Riley and Agnes Winslow Riley (1972)
 Helen S. Sharp (1966)
 Frank R. Shepard (1954)
 Anne G. Shewell (1984)
 Alice Wilder Smith in memory of Frank Langdon Smith (1968)
 Eleanor Smith (1986)
 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)
 Joseph A. White (1979)
 Edward E. Williams (1950)
 Lizzie A. Williams (1951)

Trusts

Margaret Shaw Allen Trust (1982)
 James R. Bancroft Trust (1983)
 Helen C. Barker Trust (1990)
 Nancy Beals Trust U/W (1984)
 Richard A. Berenson Family Trust 1972 (2000)
 Nelson Bigelow Trust (1990)

Mabel M. Brown Trust (1991)
 Ellen E. Carroll Trust U/W (1979)
 Robert M. Christison Trust U/A (1984)
 Ford H. Cooper Trust (1982)
 Anne H. Davis Trust U/Ind (1964)
 Gladys Dean Trust U/Dec (Laurence Guild Dean Fund) (1977)
 Paul Elliott Trust U/Agreement (1991)
 Ruth S. Frake Trust Bequest (1981)
 Carrie A. Hartley Trust U/Ind (1963)
 Helen P. Hennessey Trust (1984)
 Ada H. and Clara Hersey Trust U/Ind (1955)
 Elizabeth D. Herteli Trust (2003)
 Vladimir N. Herteli Trust (2003)
 George L. Hill Trust (2002)
 Mark Hyman, Jr. Insurance Trust (1999)
 Cyril H. Jones Trust U/Ind (1974)
 Pauline Kleven 1988 Trust (1990)
 Aimee Lamb Trust U/Ind in memory of Winthrop and Aimee Sargent (1980)

Barbara Estabrook Livermore Trust (1982)
 Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund) (1973)
 Adalaide Sargent Mason Trust (1982)
 Phyllis McGillicuddy Trust (1993)
 Ethel Fay McGuire Trust U/Ind (1973)
 David D. Moir Revocable Trust (1992)
 Gertrude Morrison Trust U/Ind (1965)
 Hetty R. Phillips 1974 Trust (1980)
 Robert O. Preyer Charitable Lead Unitrust (1992)
 Esther Frances Quinn Trust (1995)
 Harriet Rogers Unitrust (1990)
 Florence M. Scott Trust U/W (1971)
 George F. Shadwell Trust (1990)
 J. de Vere Simmons Trust (1985)
 Edson B. Smith Trust U/A (1984)
 Irene C. Smith Trust U/A (1975)
 Spaulding-Potter Charitable Trusts (1972)
 Margaret Castle Tozzer Trust U/Ind (1978)

Named Funds and Field of Interest Funds

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

(Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

Adams, Harkness & Hill Fund (1984) unrestricted
 Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics
 *Anonymous Fund (1987) unrestricted

*Boston Foundation Arts Fund (1997) for the Boston Foundation's Arts Initiative:
 Edith Allanbrook Fund (2002) to provide for children with extraordinary promise in the area of the arts

*Anna Faith Jones Arts Fund (2000) part of the Boston Foundation's Arts Fund, recognizing and honoring the leadership and service of Anna Faith Jones and her special commitment to supporting the arts

MassDevelopment Arts Fund for Community and Economic Development (2003) A sub-fund of the Boston Foundation Arts Fund, the MassDev Arts Fund was established by MassDevelopment to make grants to arts, cultural and community-based nonprofit organizations conducting arts and cultural development projects or studies that promote

Edward Hyde Cox Fund (2000) for support of programs involving classical music, painting and/or sculpture

*Stephen and Sybil Stone Arts Fund (2003) to support programs and organizations that provide residents, especially youth and young adults who do not otherwise have the means for involvement, with opportunities to attend and participate in the arts

Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund

Edith M. Ashley Fund (1960) primarily for the aid of blind and crippled persons

*Geno A. Ballotti Fund (1984) unrestricted

Irene W. Bancroft Fund (1997) unrestricted

Harriett M. Bartlett Fund (1987) unrestricted

J. E. Adrien Blais Fund I (1967) unrestricted except that "not more than fifty percent" of the income is to be paid to two named agencies and for research and care for the elderly

J. E. Adrien Blais Fund II (1967) for the relief, support or assistance of poor or needy Massachusetts residents

J. E. Adrien Blais Fund III (1967) for the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease

*Boston Parks Access Fund (2002) distributions of income will be made on a quarterly basis to the Boston Parks Department or the Arnold Arboretum of Harvard or to the administrators of other public park land within the City of Boston boundaries

Emily Budd Fund (1960) for fresh air vacations for under-privileged children

Camping Associates of Roslindale & Milton Fund (1981) for camping programs in the Greater Boston area

Community Organizing & Advocacy Endowment Fund (1988) to support low-income neighborhood grassroots organizing and advocacy focused on institutional change

Coolidge Christian Education Fund (1993) for Christian scholarship and the promotion of Christian values among young people through education and music

Curtis International Council Fund (2000) to promote international peace and understanding and to foster cooperation and increase communication among diverse organizations in the Boston metropolitan area active in the field of international relations

Frank B. & Watson G. Cutter Fund (1984) unrestricted

Mabel Walsh Danforth Fund (1949) for education, assistance or relief of crippled children

James Dean Fund (1946) unrestricted but with preference for projects of maritime nature

Virginia Herrick Deknatel Fund for Children's Services (2001) to be used for children's services

Major Arthur M. Diggles Foundation Fund (1993) to aid Mass. disabled and sick soldiers, sailors and women who have been in the US military, naval or nursing services during any war or to aid any Mass. hospital or institution to care for these individuals

Annie S. Dillaway Fund (1965) primarily to promote the welfare of boys and girls and young people

Katherine E. Dooley Fund (1997) unrestricted

*East Boston Chelsea Creek Fund (2005) for projects, programs and organizations in Chelsea or East Boston, Massachusetts

Kate Ellis Fund (1953) for convalescents, children, blind and deaf persons, and homes for Protestant aged men and women, especially charities outside of Boston

Ruby C. Emerson Fund (1966) for the college education of young people of the Protestant denomination

Frederika Home Fund (1979) for the benefit and welfare of elderly men and women, and for research into the care of elderly

Edward Glines Fund (1938) unrestricted



- Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the home
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- Theodore C. Hollander Trust Fund (1929) income to be used "in part" for hospitals, education and the improvement of American citizenship
- Nathaniel Hooper Fund (1938) unrestricted
- Grace A. Jacobs Fund (1988) unrestricted
- Jacoby Club of Boston Fund (1984) to provide kindly, personal help and concern for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances
- Jamaica Plain Dispensary Fund (1962) for the benefit of poor people in or near Jamaica Plain, particularly for health related needs
- Charles Frederick Joy and Dora Marie Joy Fund (1992) income to be used for summer vacations for two worthy Protestant girls and one boy and any excess income shall be used to help in the care of sick Protestant children or Protestant girls or women
- Kevin Kelly Fund for the Performing Arts (1994) for the Boston Foundation's Arts Initiative
- Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis
- Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye
- Massachusetts Civic League Fund (1983) to promote sound government
- Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes
- Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women
- Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1954) for aid to needy gentlewomen
- Norman Everett Pearl Fund (1996) for recognized charities in the Boston area
- Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, non-profit radio and television stations) providing musical programs
- *Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River
- Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music
- *David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Ruth M. Reiss Memorial Fund (1997) unrestricted
- Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea
- Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind
- Walter J. & Marjorie B. Salmon Fund (1999) unrestricted
- Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children
- Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people
- *Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs desired
- Sophia Snow Fund (1948) for care and support of destitute children of Roxbury
- *Starr Foundation Fund (1985) to alleviate the sufferings of the truly needy in the Greater Boston area in terms of food, clothing and shelter
- Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions
- Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women
- Carroll J. Swan Memorial Fund for Children's Charities (1935) for summer vacations for needy children of Greater Boston
- Abraham & Esther Walerstein Fund (1981) for the support of the elderly
- Nelson E. Weeks Fund (1937) for alleviation of suffering in Boston hospitals
- Fanny Wharton Fund (1919) for the relief of sick young women and children
- Katherine C. Wheeler Fund (1987) to increase knowledge of good government and for the encouragement of good citizenship
- Arthur L. Williston and Irene S. Williston Trust For Education (1953) to provide assistance, educational aid and training at institutions other than usual four year colleges
- Mary Denny Williston Fund (1969) for summer camp vacations for children; for work with alcoholics
- Window Shop Fund (1988) (Marion Gordon Bever Memorial Fund) to provide educational aid including but not limited to the ACCESS Program and other assistance for refugees and foreign born residents of the United States
- Gladys W. Yetton Fund (1969) for widows and single women in straitened circumstances

Special Initiative Funds

The Boston Foundation holds a number of Funds that support special initiatives that respond to some of the most pressing challenges facing our community in innovative ways. (Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

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| <p>After School for All Partnership Fund (2003) for the Foundation's After School Initiative</p> | <p>*EdVestors Collaborative Fund (2003) for nonprofit-school partnerships that enable schools and teachers to achieve their instructional goals</p> | <p>Polaroid Fund (1997) to help children and adults become more independent and realized their full potential as successful members of society</p> | <p>Darlene & Jerry Jordan Fund for Children (2000) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*Arts Service Organization Fund (2003) for grants to art service organizations</p> | <p>*English for New Bostonians Fund (2000) for support of the meeting the ESOL Demand program</p> | <p>President's Initiative Fund (2002) to create the President's Initiative Pre-Development Program Fund</p> | <p>Margarete McNeice Fund (2001) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*Boston Community Building Network (1987) for development projects dedicated to reducing persistent poverty in Boston</p> | <p>Fund for Racial Justice Innovation (2003) to strengthen partnerships between community-based organizations and lawyers that use legal tools to advance equity resource distribution for communities or groups marginalized by race, color, ethnicity or immigration status</p> | <p>Program Related Investments Fund (1990) for program related investment loans</p> | <p>David R. and Muriel K. Pokross Fund (2003) a component fund for the United Way Millennium Fund for Children and Families</p> |
| <p>Boston Indicators of Change, Progress and Sustainability Project (1998) to examine Boston's strengths and challenges that impact the quality of life of people who live and work in the City of Boston</p> | <p>*Home Funders Fund (2002) to help increase the supply of housing affordable to families whose income is below 30 percent of the area median income</p> | <p>*SkillWorks Fund (2001) a partnership between several local and national funders to focus on job training for disadvantaged job seekers</p> | <p>Schoen Family Fund (1999) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings</p> | <p>Homelessness Prevention Initiative (2005) to champion the cost-effective strategy of prevention, employing a multi-pronged approach that seeks to demonstrate the effectiveness of a spectrum of programs</p> | <p>Teen Initiative Best Practices Fund (2005) to recognize best practices in teen programming</p> | <p>*Tom & Nancy Shepherd Fund (2001) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*Civic Engagement Project Fund (2002) to increase nonpartisan voter registration and mobilization in low-income communities and communities of color with low rates of voter participation</p> | <p>Neighborhood Development Support Collaborative Fund (1993) for a Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations</p> | <p>*United Way Millennium Fund for Children and Families (1999) an endowment partnership with the Boston Foundation:</p> | <p>*State Street Foundation Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*Civic Leadership Fund at The Boston Foundation (2002) Fund designed to raise outside contributions in support of annual expenses associated with TBF's expanded role as convener and host of major community forums which promote the civic health of our region</p> | <p>Neighborhood Preservation Initiative Fund (1995) for community development in East Boston</p> | <p>Ansinn Fund (2002) a component fund for the United Way Millennium Fund for Children and Families</p> | <p>J.C. Tempel Fund for Children (2001) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>Community Safety Fund (2002) to reduce the rate of violent crime in Boston after years of unprecedented success during the 1990's</p> | <p>New Economy Initiative Fund (2001) for grants under the Foundation's New Economy Initiative</p> | <p>Chelsea Boys and Girls Club Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; a portion of distribution for the Chelsea Boys & Girls Club</p> | <p>*Vinik Family Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> |
| <p>*EdVestors Fund (2002) an initiative to educate potential donors about urban school reform issues and to interest them in selected innovative educational projects and programs in Eastern Massachusetts</p> | <p>*Pilot Schools Project Fund (2002) for grants under the Foundation's Pilot Schools Initiative</p> | <p>*Connell Family Fund (2000) a component fund for the United Way Millennium Fund for Children and Families</p> | <p>Peter and Pamela Voss Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; for the "Keeping Kids On Track" Program</p> |
| | | <p>Lawrence & Beth Greenberg Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> | <p>Vision Fund (1994) for small grants to community organizations for planning, development and training</p> |

Designated Funds

Designated Funds have been established by donors to support one or more of their favorite nonprofit organizations in perpetuity. Through these funds, many nonprofit institutions receive crucial annual support. The year the fund was established is listed in parentheses.

(Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

Acton-Boxborough Student Activity Fund (1981) for student activities of the Acton-Boxborough Regional School District	Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston	Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition	Julia Child Fund (1979) for fellowships to support professional study, research, writing and teaching related to food, wine and the culinary disciplines, with preference to those planning to study in France
Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston	Lilian G. Bates Fund (1951) for three named agencies	Charles T. Burke Fund for the Watertown Boys and Girls Club (1994) for the Boys and Girls Club of Watertown, Inc.	Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted
Rae and Aaron Alberts Foundation Fund (2002) to be distributed annually in equal amounts to: the Carroll Center for the Blind, the Perkins School for the Blind, the Vinfen Corporation, the Jewish Family and Children's Services, and the New England Sinai Hospital	Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts	Charles T. Burke Fund for the Watertown Free Public Library (1994) for the Watertown Free Public Library	*City to City Fund (2005) for the City to City program
Rae and Aaron Alberts Foundation Fund II (2005) to be distributed annually in equal amounts to the Salvation Army, the American Kidney Fund, the American Cancer Society, Children's Hospital of Boston, Massachusetts General Hospital, Combined Jewish Philanthropies of Boston, and the Massachusetts Special Olympics Association	Boston Ballet-E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet	Agnes T. Carruth Fund (1983) to the Kind Edward VII Memorial Hospital, to be used in whatever manner the governing body of said hospital shall see fit, but preferably for the care and treatment of persons suffering from asthma	*English High School Class of 1934 Award Fund (1994) scholarship to a Boston English High School student with preference given to students who show marked improvement and particularly those who are succeeding in spite of adverse circumstances
ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation	Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association	James F. Casey Fund (1949) for seven named agencies	Ernest & Vera Clivio Charitable Memorial Fund (1981) for the benefit of two named agencies
*Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Fund	Boston Baroque Fund (2003) for general operating support of Boston Baroque	Alex Castoldi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students	Elizabeth Cook ACF Student Fund (1997) to provide short-term funds to students associated with the Ad Club Foundation
Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals	*Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.	Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose	Almon B. Cook-Relief Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester
Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs	Boston Lesbian & Gay Communities Funding Partnership Fund (1994) for efforts to plan and implement a process to address gay and lesbian issues on an ongoing basis within the Greater Boston area	*Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy	*Robert S. Cummings Scholarship Fund (1997) scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs
	Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College	Philip P. Chase Fund (1955) for five named agencies	
	Annie L. Breckenridge Trust Fund (2000) for the benefit of the Massachusetts Society for the Prevention of Cruelty to Animals and the Mary Lane Hospital Association		



*Dedham Choral Society Endowment Fund (1991) (including the Brian Jones Fund) for the Dedham Choral Society, Inc.
 Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra concert series to young people in the New England area

East Boston Social Centers, Inc. Fund (1996) for the East Boston Social Centers, Inc.
 Douglas A. Eaton Memorial Fund (1962) for scholarships to members of the graduating class of Hingham High School
 The English High School-John P. Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School

Philip M. Fagan Family Fund (1971) for Combined Jewish Philanthropies of Greater Boston
 Paul R. & Jacqueline D. Fehrenbach Family Fund (1999) for Junior Achievement of Eastern Massachusetts
 Benjamin M. Feinberg Fund (1962) for Hebrew College
 Arthur Fiedler Esplanade Concerts Fund (1980) for the support of free concerts on the Esplanade
 Felix Fox Memorial Fund (1974) for the Community Music Center of Boston
 Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy
 General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Public Schools Foundation, Inc.
 John & Ethel Goldberg Fund I (1984) for the benefit of Brandeis University and West End House, Inc.
 John & Ethel Goldberg Fund IV (1984) for support of eye retina research and related eye research technology
 John & Ethel Goldberg Fund V (1984) for the continuing professional education of Massachusetts judges in subjects directly pertinent to the performance of their judicial and administrative duties
 John & Ethel Goldberg Fund VI (1984) for Suffolk University Law School for the "needs of the law school with respect to scholarship and maintenance or renovations to the buildings housing the law school"
 Barbara W. & Frank B. Gopen Fund (1978) for the benefit of Massachusetts General Hospital and the Arthritis Foundation
 Walter W. Gove Fund (1972) for two named agencies

Elizabeth Grant Fund (1980) for five named agencies
 Greatrex Scholarship Fund (1988) for scholarship awards to Foxborough Massachusetts students who are in need of financial aid to attend college, trade school or nursing hospital
 Rosario Fajardo Hagan Fund (1991) for the Life Experience School
 Patricia Jellinek Hallowell Fund (1992) for support of the Patricia Jellinek Hallowell Scholarship Fund at the Museum School, Museum of Fine Arts
 Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation
 Hastings-Plummer Fund (1940) for Crittenton Hastings House of the Florence Crittenton League, in part for special purposes
 Benjamin Patrick Hermann Fund (2002) for the New England Conservatory's efforts to recruit accomplished cellists to teach cello master classes in the extension division
 *Jorge N. Hernandez Fund (1987) for support of the Jorge N. Hernandez Cultural Center
 Gertrude Hooper Fund (1996) for benefit of the Crime and Justice Foundation
 Madeleine C. Huiginn Fund (1993) income to be added annually to principal
 Blanche Hyslop Fund (1982) to three named agencies
 Orchestra of Indian Hill Music Director Fund (2002) for the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra's conductors's chair
 James W. & Margaret A. Ingraham Charitable Fund (1992) for the benefit of five named agencies

- *Ella Jackson Artists and Scholars Fund (1982) for the Truro Center for the Arts on Castle Hill
- Jamaica Plain Open Studios Fund (2002) for support of the Jamaica Plain Arts Council
- Patrick F. Jones, Jr. Endowment Fund (1981) for the benefit of the Lena Park Community Development Project
- Donaldson F. Jones Fund (1999) for the benefit of Massachusetts General Hospital / The Claude E. Welch Surgical Research and Education Fund
- John F. Kennedy Library Foundation Endowment Fund (1984) for support of the John F. Kennedy Library Foundation
- Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School
- Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA
- Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society
- Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)
- Gerald V. Levreault & Claire H. Levreault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England
- Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine
- Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation
- Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts
- John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution
- MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation
- Joe Alex Morris, Jr. Memorial Lectureship Fund (1982) income to be paid to the Neiman Foundation for Journalism at Harvard University
- Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency. Currently the program is the "Short Stop" of Somerville
- Harry D. Neary Fund (1950) for five named agencies
- New England Aquarium Education Fund (1983) (Robert G. Stone Fund, Paul F. Hellmuth Fund, Helen B. Spaulding Fund, and the William S. Brewster Fund) to support educational programs at the New England Aquarium
- New England Women's Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women's Club Memorial Lecture Series, devoted to the discussion and study of women's history in Boston
- Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science's Internship Program
- Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school
- Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts
- Stephen D. Paine Scholarship Fund (1999) scholarship recipients to be determined by a Massachusetts Cultural Council jury process
- Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library
- William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning
- Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center's Scholarship Program
- Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post- secondary vocational education
- Charles & Cornelia Pfaff Fund (1964) for four named hospitals
- Emma K. & Richard Pigeon Fund (1955) half of income for three named agencies on Cape Cod and half unrestricted
- Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors
- Primary Care Fellowship Program Fund (1983) to support Harvard Medical School's program of preparing general internists for academic careers
- Public School Management Research Fund (2002) to support Steven F. Wilson's project entitled, "Private Management of Public Schools: What Have We Learned?"
- Charlotte F. & Irving W. Rabb Family Fund (1984) for Boston Symphony Orchestra youth programs
- Reading Visiting Nurse Association Fund (1976) for the Combined Visiting Nurse Association of North Reading, Stoneham, Wakefield and Woburn, Inc. for its work in Reading
- Rogers Fund of the Riverside Cemetery (1997) to preserve and maintain the Rogers Mausoleum structures and grounds at the Riverside Cemetery in Fairhaven, Massachusetts
- Henry A. Root Fund (1926) for the Service Pension Society of the Unitarian Universalist Association
- Rose Fund (1981) for the Carol Rabb Goldberg Seminars for Urban Problems at Tufts University
- Fund for Rosie's Place (1984) to benefit Rosie's Place
- Bessie H. Short Fund (1997) for the benefit of elderly residents of the Town of Wrentham, Massachusetts
- Dana P. & Maude E. Simpson Memorial Fund (1998) half of the income for seven named agencies and the other half unrestricted
- Muriel & Otto Snowden Endowment Fund (1984) endowment fund for Freedom House
- Social Law Library Endowment Fund (1982) for the support of various library programs
- Michael Spock Community Service Fund (1980) for support of the Children's Museum outreach services for the Boston community
- Alison L. Stevens Fund (1976) for two named agencies
- *Stephen A. Stone Scholarship Fund (2002) for students at Wareham High School in Wareham, Massachusetts
- Sybil F. Stone Arts Scholarship Fund (2005) for a scholarship at the School of the Museum of Fine Arts

Miriam & Sidney Stoneman Fund (1984) to benefit Boston Symphony Orchestra youth activities
 Support for Early Educational Development Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation, Inc.
 Surfmen's Trust Fund (1977) for the Coast Guard Mutual Assistance Fund
 Surkin Endowment Fund (1981) for support of the various projects of the Boston Center for the Arts

Agnes & Lewis Taylor Fund (1962) for the Orleans United Methodist Church in Orleans, Massachusetts
 Frank B. Thayer Fund (1976) for three named agencies, but one-fourth of the income unrestricted
 Robert E. Wallace Memorial Fund of the Urban League (1992) to support professional development activities of the Urban League of Eastern Massachusetts, emphasizing programs for youth and education

Bradford Washburn Fund (1980) for support of community services of the Museum of Science
 Bill and Estelle Watters Fund (1997) for three named agencies
 George & Judy Webb Fund (1986) to benefit Princeton University and Phillips Academy
 Jane Wengren Fund (1979) for the benefit of the Center for International Visitors of Greater Boston
 Stetson Whitcher Fund (1986) to benefit eight named agencies

May J. Wikstrom Fund (1998) to support eye retina research
 Rudolph & Sara Wyner Prize Fund (1985) to the New Israel Fund for a prize award (paid every fifth year) to an organization that has made a significant and positive contribution to mutual cooperation and reconciliation among Arabs and Jews in Israel

Donor Advised Funds

The following is a list of all Donor Advised Funds established by people who choose to be actively involved in the grantmaking process.

The year the fund was established is listed in parentheses.

(Note: Those funds with asterisks received contributions in 2005. We are grateful to the many donors who have chosen to add to their charitable funds this year.)

A.L.S. Fund (2002)	*Rosamond W. Allen Charitable Fund (2004)	*Anthropologists' Fund for Urgent Anthropological Research (1996)	John & Judith Barber Fund (2002)
*AADS Memorial Fund (2004)	Dwight & Stella Allison Fund (1982)	*Arba Lifnot Boker Fund (1992)	*Richard Allan Barry Fund (2002)
Maida & George Abrams Fund (1985)	*Alper Family Fund (1995)	Atalaya Fund (2004)	Basil Street Fund (1998)
*Abromowitz/Ruttenberg Family Fund (2000)	*Altamira Fund (1994)	*Atlantic Fund (1997)	Baudanza Family Fund (1997)
*Acacia Fund (2004)	George and Nedda Anders Fund (1991)	*Ausschnitt Fund (2004)	*Baupost Group Charitable Fund (2004)
Ad Club Foundation Fund (1987)	Carol and Howard Anderson Family Fund (1997)	*Avery Family Fund (2003)	Bellevue Fund (1999)
Adopt-A-Statue Endowment Fund (1988)	Barbara Jane Anderson Fund (2000)	*Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)	William D. & Mary E. Benjes Fund (1984)
Affinity Services Corporation Fund (2003)	Michael & Ellen Angino Fund (1997)	Katharine & George Baker Fund (1987)	*Charlotte Saltonstall Bigham Memorial Fund (2004)
*Agatha Fund (2004)	*Harry Ankeles Scholarship Fund (1992)	Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)	Bird Fund (1999)
*Alchemy Arts Fund (1993)	scholarships for students from Peabody who will graduate from a high school located in Peabody who are seeking undergraduate degrees from accredited colleges or universities	Richard Balzer Fund (2004)	*Bitpipe Legacy Fund (2004)
Richard and Kimberlee Alemian Fund (1996)		Bank of Boston 200th Anniversary Fund (1982) for support of the Boston Plan for Excellence in the Public Schools Foundation	*Linda Cabot Black Fund (1983)
Peter J. and Joan M. Allegrini Fund (1990)	*Anony Fund (1998)	BANT Fund (1986)	*NICSA/William T. Blackwell Scholarship Fund (1995)
*Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)	Anonymous Fund IV (1995)		Emmanuel and Jane Blitz Fund (1992)
Emily Tuckerman Allen Fund (2004)	*Anthos Family Fund (2004)		Joan T. Bok Fund (1997)

Boston City Hospital Social Service Fund (1981) for medical social treatment, including rehabilitation, of needy patients of Boston Medical Center; for training costs and other costs of social work students in the Boston area

*Boston Foundation Distribution Fund (1992)

*Boston Foundation Real Estate Gift Fund (2004)

Braverman Family Fund (1992)

*Francis J. Bresnahan Educational Scholarship Fund (1986)

Peter A. Brooke Fund (1998)

*Peter W. and Ruth H. Brooke Fund (2004)

John F. Brooke Fund (2000)

*Franklin S. & Cynthia B. Browning Fund (1988)

Bullock Family Fund (1997)

*Burden Family Charitable Fund (1999)

Denise A. Burgess Fund (2002)

*Bill and Barbara Burgess Fund (2002)

William T. Burgin Fund (2001)

*John A. Butler Memorial Fund (1988)

Kairos Butler Fund (1994)

Butler's Hole Fund (1994)

C & K Foundation Fund (2000)

Norman L. Cahners Fund (1984)

Campbell Foundation Fund (2003)

*Allan R. and Martha M. Campbell Fund (1996)

*A. Bruce Campbell Fund (2002)

Erin K. Campbell Fund (2002)

Michael C. Campbell Fund (2002)

Carpenter Family Foundation Fund (1997)

C. Alec and Sarah O' H. Casey Charitable Fund (1993)

*Margaret W. Casey Fund (1986)

Ellen W. Casey Fund (1993)

*John J. Cattaneo III Fund (1984)

Champa Charitable Foundation Fund (2003)

*Chasin/Gilden Family Fund (2000)

*Chea Uy Fund (1991)

Charles Ezekiel & Jane Garfield Cheever Fund (1998)

*Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative

*Joyce Chen and Helen Chen Foundation Fund (1995)

Christ on Earth Fund (1989)

Christ on Earth Fund II (2002)

Michael W. Christian Memorial Fund (1986)

Dr. & Mrs. B.U. Chung Fund (1999)

Chung Family Fund (1999)

Churchill Family Fund (1997)

Circle Fund (1997) priority given to organizations which support grassroots organizing for social change

John J. Clancy Fund (1998)

Clarke Fund (1987)

*Cohen/Lucas Fund (1999)

Coit Family Fund A (2001)

Colby Charitable Fund (1980)

*Colette Phillips Scholarship Fund (2004)

Colony Road Fund (1997)

Community Benefits Trust Fund (1998)

Condor Street Fund (1988)

John and Kimberly Cone Fund (1995)

*Constance and Lewis Counts Fund (1990)

*Timothy and Kathryn Conway Charitable Fund (2004)

Coolidge Family Fund (1982)

Cooper Leeser Family Fund (1997)



Copernicus Fund (2003)

Corvelli Fund (1996)

George D. & Angelyn K. Coupounas Fund (1994)

Demetrios G. C. & Kimberly A. Coupounas Fund (1996)

Sophia D. Coupounas Fund (1996)

*Cregan Charitable Fund (2005)

Crosby Family Fund (2000)

*Dainger Fund (1997)

Dammann Boston Fund (2003)

Paula Marie Danforth Memorial Scholarship Fund (1990) for a student attending either Lincoln/Sudbury Regional Vocational High School or Minuteman Regional Vocational Technical High School

Darling Family Fund (1983)

John Da Silva Memorial Fund (1988)

Todd F. Davenport Family Foundation Fund (2000)

Elizabeth Deming Coxe Fund (1995)

Edward L. and Paula B. DeMore Fund (2003)

deVille Fund (1994)

DeWolfe Family Fund (2000)

*Joe DiGeronimo Charitable Fund (2004)

*Phyllis and Jimmy DiGeronimo Fund (2004)

*Dillon Fund (2004)

Doe Noordzij Fund (2001)

*Eugene B. & Nina L. Doggett Charitable Fund (1999)

Douglas Drane Family Fund (1984)

Drane Center Fund (2002)

Duggan Charity Fund (1998)

Margaret Eagle Foundation Fund (2000)

*Lesser Eber Fund (2005)

*Echo Rock Fund (2000)

*A & E Educational Quest Fund (2004)

*EdVestors Grantmaking Fund (2003)

*Eisenson Family Fund (2005)

*Ellis Family Fund (2003)

Employment Retention Fund (2004)

Ethics Trust Fund (1993)

Evans Family Fund (1999)

Norris & Constance Evans Charitable Fund (1999)

Eagle Bank-Frank E. Woodward Scholarship Fund (1985) scholarships for Everett residents

Excalibur Fund (1999)

*Peter and Ellen Fallon Fund (1997)

Thomas F. Farb & Stacy S. Valhouli Family Fund (2001)

Fayerweather Fund (1988)

Martin & Kathleen Feldstein Fund (1986)

*Ferdinand Fund (2000)

Fine Family Foundation Fund (2002)

Mark Hayden Fineman Chess Tournament Fund (1985) for awards to pre-high school students of the Nauset Regional School System who have demonstrated the greatest skill in chess

*Fisher Family Fund (2000)

Fishreys Family Philanthropic Fund (1999)

*Gloria A. Flaherty Fund (2003)

Edward S. Fleming Fund (1983)

*Jack Florey Fund (2004)

*Florin Family Charitable Fund (2004)

G. David Forney, Jr. Fund (1986)

Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families

*Americo J. Francisco Charity Fund (1998)

Americo J. Francisco Scholarship Fund (1993)

*Niki & Alan Friedberg Fund (1986)

Orrie M. Friedman Charitable Fund (1995)

Fulkerson Family Fund (1998)

Davis R. Fulkerson Fund (1999)

Lyle W. Fulkerson Fund (1999)

Sarah H. Fulkerson Fund (1999)

*Gabriel Family Fund (2001)

Gabrieli Family Fund (1997)

Gaffney/Kames Foundation Fund (1997)

Ganesh Fund (2001)

*Gannon Family Charitable Fund (2003)

*John Lowell Gardner Fund (1986)

*Sherley Gardner-Smith Charitable Gift Fund (2004)

R. Abel & Nancy L. Garraghan Fund (1986)

Dave Garroway Fund (1982)

Brad Gatlin Family Fund (1995)

Gaudette Family Fund (2000)

Carl J. Gilbert Fund (1984)

*Albert Francis Gilmartin Memorial Scholarship Fund (2005) for students of Quincy, MA, residing in the Houghs Neck area

*Gladstone Family Charitable Fund (2003)

Robert and Linda Glassman Fund (1985)

Globe Mallow Fund (2000)

Gold Bug Fund (1995)

John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine

Carol R. & Avram J. Goldberg Fund (1983)

*Golden Family Fund (2000)

*Rachael P. & Andrew P. Goldfarb Fund (2000)

Louis & Phebe Goodman Fund (1996)

Goodworks Fund (2002)

Gordon Educational Fund (2001)

Sandra & Philip Gordon Family Foundation Fund (2001)

*Robert L. Gould Fund (1987)

Raymond C. & Joan C. Green Fund (1984)

Grogan Fund (2001)

Patricia H. Gross Fund (1999)

*Gualala Fund (1991)

*Charles & Dorothy Gullickson Fund for Social Change (1998)

H. Family Fund (2003)

*Mary Haas and Ronald Leavitt Donor Advised Fund (2001)

*Jay Habegger and Christine Nagle Fund (2004)

Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)

W.J. Hannigan Family Fund (2004)

*Ken and Becky Hansberry Fund (2001)

Charlotte C. Hart Family Fund (2001)

Steven W. Harvey and Susan A. Walsh Fund (1990)

Alfrederic S. Hatch Fund (1981)

*J. Allan Hauter Memorial Fund (2004)

*James E. Hayden Charitable Fund (2001)

Hebb Charitable Fund (2003)

HEIRS Fund (1996)

Heitman Family Fund (1994)

Hel lyn Fund of Boston (1998)

Helies Family Fund (2000)

Elizabeth D. Heller Fund (1987)

Henderson Fund (1996)

Henry Fund (1986)

E. Byron Hensley Jr. Charitable Fund (1993)

*Herzog Family Charitable Fund (2004)

*Hewitt Family Charitable Trust Fund (1993)

*Ann S. Higgins Fund (2001)

*Lucius T. Hill III Fund (2000)

*Petie Hilsinger Fund (1999)

Hingham Education Foundation Fund (1995)

Marc Hirschmann Foundation Fund (2002)

*Hobart / Toole Charitable Fund (2004)

Hoffman Fund (1986)

Holberger Family Fund (1993)

Holland Family Fund (1993)

Gilbert H. Hood Family Fund (1980)

*Robert Hooper Family Fund (2004)

*Helen R. Homans Fund (1984)

*Hourless Fund (1997)

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

M. Benjamin Howe Fund (1997)

*Hoyt Family Fund (2000)

Hunt Fund for Children (2001)

Investing in the Future Fund (2000)

*Ipswitch Fund (2000)

*Iron Mountain Education Fund (2004)

*J. Jill Compassion Fund (2002)

*Mitchell & Diane Jacobs Fund (1998)

*JAHHELBE Fund (2002)

James Family Fund (2001)

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

Jochkan Charitable Fund (2001)

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

*Jonas Family Fund (2000)

*Hubie Jones Fund (2004)

*Samuel Lamar Jordan Trust Fund (2000)

Jumping Rock Fund (2000)

Kalman Family Fund (1996)

*Beton M. Kaneb Fund (1983)

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

*Patricia A. Kaneb Fund (2003)

Steven E. Karol Charitable Foundation (1999)

*Kassler Family Fund (2000)

Leslie Victor Kates and Richard S. Kates Fund (2001)

*Stephen and Caroline Kaufer Charitable Giving Fund (2004)

Kaye Charitable Fund (2003)

John & Anne-Marie Keane Foundation Fund (1997)

Kearney Family Fund (1995)
 *Mr. and Mrs. Raymond B. Keefe Memorial Fund (2005)
 *Keewaydin Fund (2001)
 Sabina F. Kelly Catholic Charitable Fund (1991)
 Edmund H. & Mayotta S. Kendrick Fund (1986)
 *Keogh Family Fund (2000)
 *Khudari Fund (2005)
 *New Beginnings/Kidder Hildner Fund (2004)
 *Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
 *Kidder Smith Fund (2003)
 *M. R. Kidder Charitable Fund (2004)
 KJN Family Fund (1997)
 Kluchman Family Fund (1997)
 Allen and Elizabeth Kluchman Fund (1997)
 Klureza Family Fund (1997)
 *Knopf Family Charitable Fund (2004)
 Pamela Kohlberg Fund (1995)
 Kopacz Charitable Gift Fund (2003)
 Stephen P. Koster Fund (1985)
 *Kravitz Family Fund (1993)
 Anna Krezwick Fund (2002)
 *Raju and Melanie Kucherlapati Fund (2004)
 Clara K. Kupferschmid Childrens' Fund (1998)
 *G. Barrie Landry Fund (2005)
 Barbara Lee Family Foundation Fund (2004)
 *Thomas E. & Barbara B. Leggat Fund (1986)
 C. Martin Leinwand Fund (1986)
 Colman & Carol Levin Fund (2000)
 *Levine Family Charitable Fund (2003)
 Joan & Theodore Levitt Family Fund (2000)
 Charlotte Ruth Lewis Fund (1998)
 Edward Bernard Roland Lewis Fund (1998)
 Southard Lippincott Fund (1996)
 Ann C. Livingston Fund (2001)
 Ann C. Livingston Current Use Fund (2001)
 John S. Llewellyn, Jr. Community Assistance Fund (1996)
 LMG Fund (1997)
 Joan Locatelli Foley Memorial Fund A (1997)
 Joan Locatelli Foley Memorial Fund D (1997)
 *GC & JW Lodge Fund (2000)
 *Lord-Buck Fund (1996)
 *Lovett-Woodsum Family Fund (1998)
 *Bruce Lunder Fund (1982)
 Donald J. & S. Kelley MacDonald Charitable Fund (1998)
 Magic Penny Fund (1997)
 Mahoney Family Fund (1983)
 William G. Markos Fund (1982)
 Evelyn A. Marran Fund (1983)
 Martin Fund (1998)
 *Sydell and Edward I. Masterman Fund (1997)
 *Mayel Fund (1982)
 Richard & Judith McGinnis Fund (1999)
 Eleanor P. McIntyre Fund (2001)
 McNeill Family Fund (1997)
 Medical Research Fund (1992) to support medical research in the fields of endocrinology and/or nuclear medicine
 Emily & Bernard H. Mehlman Fund (2002)
 Mellowes Fund (1998)
 *Leila Yassa & David Mendels Fund (2000)
 *Menna/Remien Fund (1999)
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)
 *Allan Meyers Fund for the Advancement of Careers in Disability (2000)
 Michon Family Fund (1986)
 *Microsoft Unlimited Potential Fund (2005)
 *Mid-Century Fund (2004)
 J. F. Middleton Family Fund (1995)
 Mill River Foundation Fund (2004)
 Joseph Morton Miller Family Fund (1998)
 *Gabrielle J. Miller Donor Advised Fund (2004)
 *Anita L. Mishler Education Fund (1983)
 Moccasin Brook (2000)
 Molino Family Fund (2003)
 Monadnock Fund (2002)
 Tallulah Morgan Fund (1980) for educational purposes for the black community in Boston, in part for scholarships
 Morris Advised Fund (2000)
 *Sykes Moyer Fund (2005)
 *Muddy Pond Trust Fund (1994)
 *David G. Mugar Fund (1998)
 *Mullen Family Fund (2001)
 *Munger Family Fund (2001)
 *Murray Hill Charitable Fund (1995)
 Musinsky/Krieger Fund (1996)
 *Myrtle Field Fund (2004)
 Mystic Harmony Fund (2000)
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
 Narnia Fund (1986)
 *Tami E. Nason & Kent A. Lage Fund (2005)
 Jean F. and David G. Nathan Fund (1986)
 Scott A. Nathan Fund (2001)
 *Neumann Family Charitable Account Fund (2003)
 *North Conway Institute Fund (2001)
 Chad & Lia Novotny Fund (2002)
 Novotny/Ramirez Donor Advised Fund (2002)
 Novotny/Swahnberg Fund (1997)
 Ohrn Family Fund (2000)
 Ones Fund (2004)
 Richard T. O'Rourke Fund (1988)
 *Orpheus Fund (2002)
 Palisades Fund (1986)
 *Morgan Palmer Charitable Fund (1982)
 John J. Pappenheimer Fund (1995)
 Parker Family Fund (2000)
 *Field Parker Fund (1996)
 Richard J. Parker and Donna K. Sherman Charitable Fund (2003)
 *Partnership Fund in honor of Anna Faith Jones (2001)
 Alfred Nash Patterson Foundation for the Choral Arts Fund (1979) for the encouragement of composition and performance of new works of choral music and for the support of choral group activities
 Payne's Creek Fund (2001)
 *Payson Family Fund (2000)
 Peeler/Kellogg Fund (1999)
 Samuel Perkins and Nancy Reed Fund (1996)
 Sheila and Sara Perkins Fund (1996)
 Perkins Improvements Fund - William (1996)
 John A. Perkins, Jr. Fund (2000)
 John & Lydia Perkins Fund (1999)
 Robert C. Perkins Fund (2000)
 *Thomas Perls Fund (2004)
 *Roger Perry Memorial Fund (1999)
 *Peter Fund (2000)
 Petersen Family Fund (2001)
 *Kevin Phelan Fund (2004)
 Philancon Fund (1990)



Katherine A. & Fannie Phillips Fund (1997)
 Picard Family Fund (2000)
 Jamie Pierce & Rick Cresswell Fund (2002)
 Pitts Family Fund (1997)
 Renata Poggioli Fund (1991)
 Pokross/Gill Family Fund (1996)
 Pool Family Fund (1997)
 *William Townsend Porter Fund (1998)

Poss-Kapor Family Fund (1996)
 Pride in Scholarship Fund (1992) for
 scholarships to students whose academic
 work & individual contributions to the
 arts, sciences or business best serve &
 promote the gay & lesbian community
 Fred & Ruthann Prifty Fund (2001)
 Thomas & Mary Prince Family Fund (2000)
 *Sue and Bernie Pucker Fund (2002)
 Peg Pyne Fund for Handicapped Access
 (1985) to make congregations accessible
 to handicapped worshippers
 Quid Nunc Fund (2001)
 *Quinn-Jacobs Family Fund (1992)
 Sidney R. & Esther V. Rabb Family Fund
 (1983)
 Barbara & Yale Rabin Fund (2002)
 *Radtke Family Fund (1996)
 *Emma W. Ramstad Fund (1998)
 *Otto W. Ramstad Fund (1998)
 Bessye Bedrick Ravelson Fund (2003)
 *Raytheon Company Matching Gifts for
 Education Fund (2001)
 Gene Record Fund (2002)
 Sara Delano Redmond Fund (1996)
 Robert B. Reich Fund (2000)
 *Remmer-Fox Family Fund (1995)
 Renaissance Fund (1998)
 Reno Family Charitable Foundation (1998)
 *RETQ Fund (2001)
 Edward S. Reynolds Memorial Fund (1984)
 *Russell & Carla Ricci Fund (1985)
 *Rich Florin Family Fund (2005)
 *Riptide Fund (2002)
 Jonathan Rizzo Memorial Foundation Fund
 (2001)
 Thomas Roberts Fund (1995)
 *Roberts-Belove Fund (2004)

Robynhood Thanksgiving Fund (2002)
 *Rodgers Community Fund (2004)
 *Rogers Family Fund (2000)
 Rosedune Fund (1970) especially for
 educational and cultural programs,
 primarily for children
 *Andrew L. & Leslie (George) Ross Fund
 (2003)
 Rotten Dock Fund (1988)
 *Roy/Thompson Family Fund (2000)
 *Dr. Jordan S. Ruboy Charitable Fund
 (1998)
 Russell-Oliver Family Fund (1997)
 *Rust Bowl Fund (1987) for the benefit of
 cultural arts, including theatre
 Robert Sachs & Caroline Taggart Gift Fund
 (1998)
 *Risha C. and Paul A. Samuelson Fund
 (1982)
 Kazanjian Sargeant Fund (1996)
 Schawbel Family Fund (1995)
 *Margaret M. Schmidt and Kenneth J.
 Danila Fund (2004)
 Schott Fund (1999)
 *Schumann Family Fund (2005)
 Joel Schwartz Family Fund (2000)
 *Charles S. and Zena A. Scimeca Charitable
 Fund (2004)
 *Sea Street Fund (2004)
 Francis P. Sears Scholarship Fund (1973)
 *Gerald Segel Fund (1981)
 *Seim Fund (2003)
 September Fund (2000)
 *Norman J. & Maryellen S. Shachoy Fund
 (1997)
 *Shadow Lake Children's Fund (2002)
 Shames/Egasti Fund (1991)
 Shapiro/Fleishman Fund (1999)

Shawkemo Fund (2000)
 Sherborn Fund (1997) for the benefit of
 charitable organizations, activities, and
 residents of Sherborn, Mass
 *Sherman Family Foundation Fund (2005)
 William U. & J.W. Shipley Fund (2001)
 Shoe Box Foundation Fund (2004)
 *Jean Karpas Siegel Fund (1994)
 *Ellen L. Simons Fund (1997)
 63 Marlborough Street Fund (1984)
 Skylight Fund (2000)
 Ellin Smalley Fund (1987)
 Austin & Susan Smith Fund (1999)
 Walter A. & Hope Noyes Smith Fund (1985)
 J. Alper Smith Fund (1996)
 Clark R. Smith Fund (1990)
 *Snowden - Trimmier Family Fund (2002)
 *Social Venture Partners - Boston Fund
 (2001)
 Society of Women Engineers-Boston Fund
 (1996)
 *Somerville Fund (1996)
 Nancy and George Soule Family Fund
 (1997)
 *Spector Fund (2001)
 *David F. Squire Family Fund (1997)
 *Stamps Family Fund (1998)
 Aaron Stein Fund for Group Psychotherapy
 (1983)
 Harvey & Shirley Stein Fund (1999)
 Stewart-Holtzman Fund (2001)
 Stone Charitable Fund (1999)
 Stone Family Fund (1999)
 *Elihu and Lillian Stone Family Charitable
 Fund (2003)
 James M. and Cathleen D. Stone
 Foundation (1995)
 Albert and Elizabeth Stone Fund (1993)

Stonehill Enrichment Fund of the Ames Free Library (1994)
 *Robert Strange Family Fund (2003)
 Sugarman Fund (1982)
 *Charles Sugnet Fund (1998)
 *Joshua Sugnet Fund (1998)
 Nancy L. Sullivan Fund (1989)
 Diane Sullivan-Villano Fund (1998)
 *Sunrise Fund (1993)
 Sustainable Future Fund (2003)
 Sylvan Fund (1985)
 TechFoundation Fund (2002)
 *Tempero Family Fund (2002)
 Thomsen Family Fund (2000)
 *Susan and Michael Thonis Fund (2005)
 *Tiare Fund (1996)
 *Scott and Jennifer Tobin Charitable Fund (2004)
 *Topol Family Fund (1991)
 Gerard B. Townsend Charitable Fund (1995)

*Trefler Fund (1997)
 Thomas & Lois Valeo Fund (1982)
 Valette Family Charitable Fund (2001)
 Joseph Bishop Van Sciver Fund (1861-1943) (1997)
 Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter
 Vizzini Fund (1997)
 M. Volpe Kluchman Fund (2005)
 *Ann & Robert von der Lippe Fund (1997)
 *JH & EV Wade Fund (1990)
 James and Margaret Wade Fund (1997)
 Wainwright Bank Community Fund (1998)
 *Walker Fund (1998)
 Ruth & Henry Walter Fund (1982)
 J. H. & C. K. Walton Fund (1986)
 Warner Charitable Gift Fund (2000)
 Waterfield Fund (2002)

Sally Sutfenfield Webb Fund (1998)
 *Weiss Charitable Fund (2004)
 *Jack and Kathleen Welch Fund (2001)
 *Lois & David Weltman Fund (1991)
 Annie Evans White Memorial Fund (1970) for the benefit of needy persons of Winchendon, Massachusetts
 Frank & Jean White Fund (2001)
 *Janet White Memorial Scholarship Fund (2004)
 Guy and Maggie Wickwire Fund (1989)
 *Benjamin J. Williams, Jr. Fund (1986)
 *David B. Williams Fund (1986)
 *Hope A. Williams Fund (1986)
 *Natica R. Williams Fund (1986)
 *Ralph B. & Margaret C. Williams Fund (1985)
 *Ralph B. Williams, II Fund (1986)
 Winkler Family Foundation Fund (2001)
 *Owen Thomas Winship Fund (1998)

*Samuel Lee Winship Fund (1998)
 *Wesley L. Winship Fund (1998)
 *Jesse Winship-Freyer Fund (1998)
 Winsor Foundation Fund (1989)
 *Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 *Hertha & John Wolkowicz Charitable Fund (2000)
 Karin E. Wood Fund (1993)
 Michael N. Wood Fund (1996)
 Paul & Eleanor Young Fund (1988)
 *Zabin Charitable Fund (2001)
 Zarkin Family Fund (2001)
 Sylvia and Robert Zell Fund (1988)
 *Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals
 T. Zouikin Charitable Fund (2003)

Support Organizations and Other Special Funds

Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the Nashoba Valley
 James R. Bancroft Trust (1953) income to be paid to the Boston Foundation for general purposes

Boston's Fourth of July Foundation, Inc. Fund for the Environment (formally known as the Fund for the Preservation of Wildlife and Natural Areas) (1994):
 Allyn Cox Fund for Essex County Greenbelt (1994) for the benefit of the Essex County Greenbelt Association
 Herbert Farnsworth Fund (1994)
 New England Forestry Foundation Fund (1996) for the New England Forestry Foundation to aid conservation of forest land in New England

Gaywest Farm Fund (1994) for the benefit of Capen Hill Nature Sanctuary in Charlton, Massachusetts
 General Fund for Preservation of Wildlife & Natural Areas (1994)
 Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society
 Hollis D. Leverett Memorial Fund (1994) for the planting and upkeep of trees that protect and encourage wild bird life

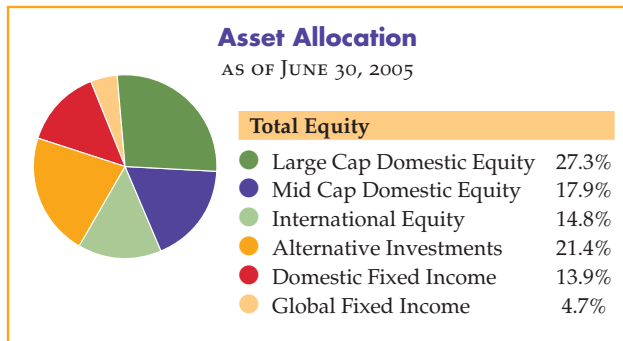
Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts
 Horace Moses Foundation (1995) to support Junior Achievement
 James M. and Cathleen D. Stone Foundation (1994)

2005 Financials

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

Fund for the 21st Century

The Foundation's assets are professionally managed in a pool known as the Fund for the 21st Century. The Fund has a long-term time horizon, and is structured with the



objective of achieving returns in excess of the targeted spending policy, costs and inflation. Total assets as of June 30, 2005 were \$686 million, up from \$647 million in the prior year.

Financial Oversight

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

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

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

Performance AS OF JUNE 30, 2005			
	1 Year	3 Year	5 Year
Total Fund	9.0%	10.3%	2.1%
Policy Benchmark*	8.8%	9.3%	1.0%
S&P 500 Index	6.3%	8.3%	-2.4%

*Policy benchmark is a composite of the individual benchmarks used to measure each manager's performance. Past performance is not a guarantee of future results.

The Spending Rate

By using a spending rate, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2005 spending rate was 5% for all endowed Boston Foundation Funds. In order to smooth out the fluctuations in the financial markets, the 5% is applied to a sixteen-quarter average. Beginning in Fiscal Year 2006, the Boston Foundation will increase its spending rule to 6%, which will add \$2 million for grants.

Socially Responsible Investing and Proxy Voting

The Boston Foundation was the first major community foundation in the country to actively promote its values and expectations around the areas of corporate governance by exercising its right to proxy voting for its investments. Proxy voting is the basic mechanism through which shareholders can influence the governance and behavior of corporation in which they hold stock. The Foundation focuses its proxy voting on key issues including the environment, community well-being, diversity and equity and good corporate governance.

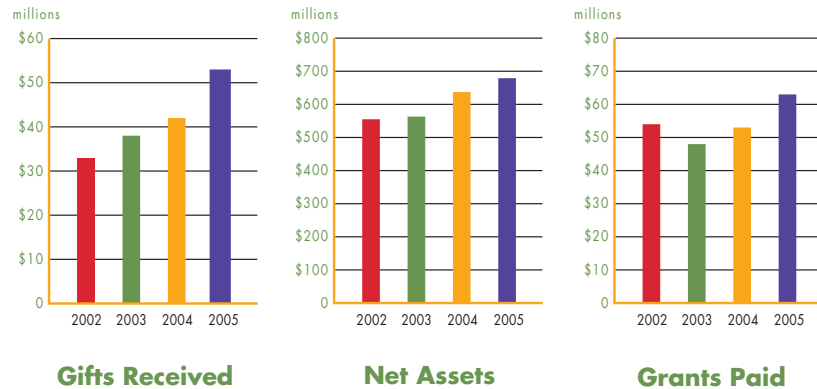
Audited Financial Statements

The Foundation's financial statements were prepared under strict policies and procedures overseen by the Foundation's independent Audit Committee and, ultimately, the Board of Directors. The statements were audited by KPMG, LLP. KPMG has issued an unqualified opinion on the financial statements for the year ended June 30, 2005. A summary of the financial statements is shown here, but copies of the full financial statements are available on our web site at www.tbf.org or by calling the Foundation's offices at 617-338-1700.

Expense Control

The Foundation's management and Board of Directors take careful steps to ensure that the operating expenses are kept as low as possible. Over the past four years, operating expenses have remained at an average of 1.0 % of total assets.

Increased Growth from 2002 through 2005



Gifts Received

Net Assets

Grants Paid

Gifts to the Boston Foundation have steadily and significantly grown over the last four years, increasing the Foundation's total assets to \$686 million. As a result, in 2005, the Foundation set an all-time record for grants paid, at more than \$63 million.

2005 Summary Financial Statements

Assets:

Receivables	\$ 19,999,694
Investments	656,154,771
Other	9,969,866
Total Assets	\$ 686,124,331

Liabilities & Net Assets:

Accounts Payable	\$ 2,419,478
Grants Payable	1,561,652
Other	3,154,806
Net Assets	678,988,395
Total Liabilities & Net Assets	\$ 686,124,331

Revenues:

Contributions	\$ 53,397,223
Net Investment Return	60,791,416
Total Revenues	\$ 114,188,639

Grants & Expenses:

Grants	\$ 63,005,644
Program Support	2,743,288
Operating Expenses	6,671,361
Total Grants & Expenses	\$ 72,420,293

Change in Net Assets	\$ 41,768,346
Net Assets Beginning of Year	\$ 637,220,049
Net Assets End of Year	\$ 678,988,395

Editor's Note

This Annual Report is the 20th created by the editorial team of Barbara Hindley, Kate Canfield, and Richard Howard. It has been our honor, over the years, to reflect the changing character of the Boston Foundation and the community it serves. We want to thank all of the people who have been photographed and quoted and profiled in these pages over the years—and Mary Jo Meisner for her guidance and support over the last four years.

For this 90th Anniversary Annual Report, thanks also go to the writer Patricia Brady for her research and writing about the early days of the Boston Foundation over the years. Thanks also to historian Susan Wilson for her research into the year 1915 in Boston.

We are deeply grateful to everyone who helped to identify photos from the early 20th century in Boston in their respective collections:

Lorna Condon and Sally Hinkle at Historic New England; Aaron Schmidt at the Boston Public Library's Print Department; Jacalyn Blume at the Schlesinger Library, Radcliffe Institute, Harvard University; Christopher Carden at the Bostonian Society's Library and Special Collections; and Sally Pierce at the Boston Athenaeum. All of these institutions play a crucial role in documenting and protecting Boston's rich history.

Photo Acknowledgments

Cover photos: Men in Shoe Factory, Historic New England; African Americans on Steps of Townhouse, Historic New England; Female Student Reading, Boston Public Library; Men and Women in Drawing Class, Schlesinger Library. *Photos pages 4 and 5:* Park Street from the Common, 1915, Boston Athenaeum; Infantile Paralysis, Boston Public Library; Immigrants, Boston Foundation Archives; William Monroe Trotter, Boston Foundation Archives; Suffragists Marching and Girl Making Paper Flowers, Schlesinger Library; Custom Tower Under Construction, Boston Public Library; Babe Ruth in 1915, courtesy of Baseball Antiquities, Ltd. *Page 9*, North End Savings Bank, Bostonian Society; *page 16*, Boy Carving Duck, *page 18*, Teacher and Students, and *page 20*, Men and Women in Drawing Class, all Schlesinger Library; *page 21*, Female Student Reading, Boston Public Library; *page 23*, Men Learning Morse Code, Schlesinger Library; *page 25*, Women Sewing, Schlesinger Library; *page 26*, African-Americans on Steps, Historic New England; *page 28*, Laundry Drying, Historic New England; *page 31*, Girl in Front of Bakery, Schlesinger Library; *page 32*, Men Posed in Shoe Factory, Historic New England; *page 35*, Children with Kitten, Boston Foundation Archives; *page 36*, Nurse with Children's Ambulance, Boston Foundation archives; *page 37*, Boys Making Planes, Schlesinger Library; *page 38*, Children Playing Instruments, Boston Public Library; *page 39*, Boys Gardening, Schlesinger Library; *page 40*, Trolley Car, *page 41*, Women Marching, *page 42*, Boys Exercising, *page 49*, Women in Office, all Schlesinger Library; *page 53*, Waterfront, Boston Public Library; *page 60*, Girl at Easel, Boston Foundation Archives; *page 64*, Young Women in Class and *page 67*, Audience of Immigrants, both Schlesinger Library; *page 70*, Children on Trunk, Boston Foundation Archives; *page 71*, Woman with Camera, Schlesinger Library. Note: In some cases, photos were available through the Boston Foundation's photo archives. We apologize to the original sources of those photos if they are not listed.



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