

# BETTER TOGETHER



Together, we're better, we're stronger, smarter and far more effective—especially when we take on the most complex challenges we face today.

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# ABOUT the Boston Foundation



## Our VALUES Statement

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



**T**he Boston Foundation, Greater Boston's community foundation, brings people and resources together to solve Boston's big problems. Established in 1915, it is one of the largest community foundations in the nation—with net assets of \$1.3 billion. In 2018, the Foundation and its donors paid \$129 million in grants to nonprofit organizations and received gifts of \$203 million. The Foundation is a close partner in philanthropy with its donors, with 1,100 separate charitable funds established either for the general benefit of the community or for special purposes. It also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), a consulting unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations around the globe.

## OUR MISSION

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

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

# The Year in NUMBERS

In 2018, we broke all records in **funds received**, at **\$203 million**. We thank our new donors and those who added to their funds, bringing our **total assets** to **\$1.3 billion**.

With the support of our donors, we also paid **\$129 million** in grants, capping a **Billion Dollar Decade** of grant making.

Our annual campaign for the **Civic Leadership Fund**, which fuels our research, forums and policy work, also broke records at **\$2.7 million**.

More than **5,000 people** came to the Boston Foundation for **forums and other convenings**. And we published **10 reports** on everything from housing to transportation to the leisure, hospitality and tourism industry.

Funds  
**ASSETS**  
Grants  
**Forums**  
**PEOPLE**  
**Reports**

# Introduction

**This Annual Report is about the unstoppable power of partnerships.**

**Together, we're not only better, we're stronger, smarter and far more effective—especially when we take on some of the most complex challenges we face today.**

Together with the Barr Foundation, we are helping to transform Boston's performing arts and music scene by supporting the local artists who drive its creativity.

Together with Eastern Bank and the Greater Boston Chamber of Commerce, we are supporting and investing in black and Latino businesses so that they can grow and thrive.

Together with Carbonite, Inc. and Hack.Diversity, we are diversifying the pool of high-skilled employees in Boston's innovation economy.

You will learn about these partnerships and many others in these pages.

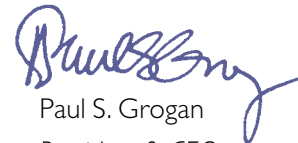
As you're reading, keep in mind that all of the work we do at the Boston Foundation—every day of every year—relies on the unique partnership we have with our donors.

This year broke all records in funds received, at \$203 million. We thank all new donors to the Boston Foundation, those who added to their Donor Advised Funds and those who helped us break another record. Our campaign for the Civic Leadership Fund, which fuels our research, forums and policy work, raised \$2.7 million. All of these new funds increase our capacity to make grants to nonprofit organizations in Greater Boston and play a critical role in moving our community forward.

We believe that by partnering with our donors, other foundations, nonprofits, businesses and government that—together—we can accomplish almost anything. And we invite you to join us.



Sandra M. Edgerley  
*Chair, Board of Directors*



Paul S. Grogan  
*President & CEO*

# BETTER TOGETHER

for the Performing Arts for the  
Innovation Economy for Puerto  
Rico for Black and Latino  
Business Owners for Healthy  
Children and Families for  
Strong Beginnings for the  
LGBTQ Community

# TOGETHER for the Performing Arts

**Front Porch Arts Collective  
members, from left:  
Paige Clark, Haley Spivey  
and college mentee  
M. Fray Cordero**





*“The arts capture the uniqueness of our own experience and simultaneously help us to discover our fundamental connectedness to others.”*

ANNA FAITH JONES

*Former President and CEO, The Boston Foundation*

In 2000, a special Boston Foundation fund was established to honor Jones and benefit the arts, which she believes inform, illuminate and strengthen community.

## LIVE ARTS BOSTON (LAB)

# \$1.6 Million

Combined investments by the Barr Foundation and the Boston Foundation totalled \$1.6 million.

“At the Barr Foundation, we believe that artists are the essential engines of creativity and community vitality,” says San San Wong, Barr’s Director of Arts + Creativity. “And in these times of unprecedented division, we believe that artists are more critical than ever as society’s truth-tellers and bridge builders.”

One way that Barr is fueling Boston’s ‘engines of creativity’ is by partnering with the Boston Foundation to fund Live Arts Boston. LAB makes grants of up to \$15,000 to artists, small performing arts groups and collaboratives to create, produce or present artistic work for Greater Boston audiences. “To have a real impact, we knew we would need a partner who could amplify and focus what we would be able to contribute,” Wong says about the partnership with the Boston Foundation. Together, Barr and the Boston Foundation have invested more than \$1.6 million in LAB.

The critical need for this type of funding emerged through the City of Boston’s “Boston Creates” cultural planning process, which called for new funding for individual artists as one way to keep artists in Boston and attract new artists.

In LAB’s first year, more than 880 artists participated in 358 LAB-funded events, including performances, workshops and festivals. Ninety-five percent of the artists performed new work and all of them reported taking artistic risks—one of LAB’s primary goals. “LAB funds are encouraging new levels of experimentation,” says the Boston Foundation’s Senior Director of Arts & Culture, Allyson Esposito. She also emphasizes LAB’s focus on all cultural traditions and artwork that deepens understanding across divides.

**The Barr Foundation’s San San Wong and the Boston Foundation’s Allyson Esposito at Central Square Theater.**





**(Center) Central Square’s Executive Director Catherine Carr Kelley with Front Porches directors (left) Maurice Emmanuel Parent and (right) Dawn M. Simmons.**

## **FRONT PORCH ARTS COLLECTIVE**

“Theater companies actually came to us and invited us to partner with them,” says Dawn M. Simmons, Artistic Director of Front Porch Arts Collective. The unexpected invitations came after Front Porch received a LAB grant to present staged readings of plays by the African-American playwright Marcus Gardley.

After attending the readings, several theaters invited Front Porch to co-produce plays in 2019, including Lyric Stage Company, Greater Boston Stage Company and Central Square Theater—which also offered the group a residency. This year, Central Square Theater and Front Porch will co-produce Gardley’s play *black odyssey*, which merges Greek mythology with the African American experience.

“For over a decade, Boston has existed without a professional black-led theater company employing artists of color,” says Maurice Emmanuel Parent, Front Porch’s Executive Director. “Our namesake signifies a communal spirit, inspiring us to serve communities of color and produce art that is inclusive of all communities and welcoming to all audiences.”

# 70%

More than 70% of this year’s LAB recipients are artists of color.

TOGETHER  
for the  
Innovation  
Economy

*“Diversity drives innovation—when we limit who can contribute, we limit what problem we can solve.”*

TELLE WHITNEY

*Former CEO of the Anita Borg Institute for Women and Technology*

**Carbonite CEO Mohamad Ali (second from left), with members of Carbonite’s Charitable Fund Committee and Hack.Diversity graduates, from left: Golzar Yaghoubpour, Matthew Powers, Ariana Gardner, James Lemonias, Jennifer Piacitelli and Eddison Razon.**



## CARBONITE AND HACK.DIVERSITY

“At Carbonite, we see diversity as an asset that enriches everything we do,” says Mohamad Ali, CEO of the fast-growing data protection company based in Boston.

And so, through the Carbonite Charitable Fund, a Donor Advised Fund at the Boston Foundation, the company has invested in Hack.Diversity, a nonprofit that is working to increase the number of black and Latino workers in Boston’s innovation economy. But the company’s commitment doesn’t end there—it also offers internships to graduates of the program.

The first, Eddison Razon, is now a full-time employee at Carbonite. Razon came to Boston from the Dominican Republic when he was 19 and went to Bunker Hill Community College, where he learned about Hack.Diversity and was one of its first students to be placed in an internship. “Everyone at Carbonite is really supportive,” says Razon who is thrilled to be working at the flourishing company. “They gave me an opportunity to change my life.”

“Coding is my addiction,” says another Hack.Diversity intern placed at Carbonite, Ariana Gardner. “If I can do it all day, I’m happy.” Her ultimate goal is to develop software. Gardner received her degree in computer science at UMass Boston in the spring of 2018. “I was always one of the few African American females in a lot of my classes. I know there are a lot of young women and men of color who would like to have the opportunity I have—thanks to Hack.Diversity and Carbonite.”

### HOW HACK.DIVERSITY WORKS

Boston’s fast-growing tech companies have an unusual challenge: They desperately need more trained workers and the workforce they have now is not nearly as diverse as they would like it to be. Hack.Diversity was founded to meet that challenge. It was launched in 2016 by the New England Venture Capital Association with support from the Boston Foundation and the SkillWorks Funders Group.

Hack.Diversity is taking on the underrepresentation of minority employees in Boston’s high-skills innovation economy by recruiting black and Latino computer science and

# 15%

Share of African-American and Latino tech workers in the U.S.

# 100%

Hack.Diversity’s goal for increasing the number of blacks and Latinos in Boston’s innovation economy

engineering students into the city's fastest-growing companies—training, coaching and mentoring both employer and employee throughout the experience.

“Our vision is a 100 percent increase in the number of black and Latino people working in the innovation economy in Boston,” says Hack.Diversity President Jody Rose. “We’re very excited about working with Carbonite and the other tech companies we’re partnering with to make that vision a reality.”

**The 2018 Hack.Diversity class**



# TOGETHER for Puerto Rico

**Co-Chairs of Massachusetts United for Puerto Rico (from left) Vanessa Calderón-Rosado, Juan Carlos Morales and Aixa Beauchamp photographed at Villa Victoria in the South End. Beauchamp and Morales also co-founded the Latino Legacy Fund.**



After disaster strikes in the United States, it can take weeks for well-meaning people to plan and mount a large-scale, organized response. When Hurricane Maria devastated the island of Puerto Rico on September 21st, 2018, it took Massachusetts just eight days.

On September 29th, Boston Mayor Martin J. Walsh, Massachusetts Governor Charlie Baker and the Boston Foundation—in partnership with the Latino Legacy Fund—announced the creation of Massachusetts United for Puerto Rico/Massachusetts Unido por Puerto Rico. The fund is dedicated to the relief and recovery of people living on the island as well as the support of evacuees in Massachusetts.

The remarkable speed and organization were made possible by a strong confluence of relationships. First, the Boston Foundation has a close relationship with Boston's Latino community, especially through its Latino Legacy Fund, the first Latino-focused fund in Greater Boston. Second, the Fund's leaders and members have deep ties to Boston's Puerto Rican community. Third, the Foundation had experience: It had mounted similar funds for relief in Haiti, Japan and Nepal after earthquakes struck those countries. Finally, the Foundation has strong relationships with city and state government.

In the weeks immediately following the hurricane, Massachusetts United for Puerto Rico made more than \$100,000 in grants to community-based organizations providing direct relief and funded Latino-led nonprofits to assist the thousands of Puerto Rican evacuees who poured into our state.

Since then, the Fund has raised close to \$4 million and distributed more than half of those funds in grants with more funds flowing every month.

We now know that Hurricane Maria was one of the deadliest disasters in American history. Massachusetts United for Puerto Rico continues to accept donations from generous individuals and companies who understand that the crisis in Puerto Rico continues to have a profound impact on the well-being of its people and institutions—and will for many years to come.

## MASSACHUSETTS UNITED FOR PUERTO RICO AND THE LATINO LEGACY FUND

\$3.8  
Million

Funds raised

\$2.1  
Million

Grants made to date

68

Nonprofits supported

*“...No matter who  
you are, what  
you look like, or where  
you come from,  
America is a place  
where everyone  
deserves a chance  
to get ahead.”*

PRESIDENT BARACK OBAMA

From a Proclamation for Minority Enterprise Development Week, 2016



# TOGETHER for Black and Latino Business Owners



**Marianne Lancaster talking  
with one of her employees**

## THE BUSINESS EQUITY FUND

\$2  
Million

Eastern Bank's investment  
in the Fund

“Is this your family's business?” Marianne Lancaster often was asked when she was starting Lancaster Packaging, Inc. Or even, “Is this your husband's business?” The answer was always, “No, this is my business.” As an African-American woman, she started a company that has become a major supplier of wholesale packaging and industrial supplies to Fortune 500 firms. It occupies two large warehouses in Hudson, Massachusetts, employs 20 workers, has \$18.7 million in annual revenue—and is poised for the next step. “The main thing holding us back? Access to capital.”

Enter the Business Equity Fund, a partnership of Eastern Bank's Business Equity Initiative (BEI), the Greater Boston Chamber of Commerce's Pacesetter Initiative and the Boston Foundation. At first, Lancaster was slightly leery about it, since past efforts to support minority-owned businesses have fallen short. After speaking with BEI Executive Director Glynn Lloyd, she was convinced to apply.

Now, Lancaster Packaging is the first company to receive an infusion of capital from the Business Equity Fund at the Boston Foundation of \$350,000. The goal is to increase the company's revenue to \$27 million and add 10 employees by 2020. Lancaster adds, “This investment will help us jump start our own next phase and go so much higher!”

### AN ECOSYSTEM BUILT TO GROW MINORITY BUSINESSES

The Business Equity Fund provides alternative financing and access to capital for qualified businesses owned by people of color that have been constrained by conventional financing practices. The Fund works alongside two other programs, forming an ecosystem approach.

Eastern Bank invested \$8 million in BEI, with the goal of helping minority businesses grow and thrive. The businesses are carefully vetted and matched with a strategic advisor—an experienced business executive who helps them develop and implement a strategic growth plan. The BEI team and the Greater Boston Chamber of Commerce partnered to create the Pacesetters Initiative to encourage Chamber member organizations to use their collective purchasing power to create opportunities for local enterprises of color, particularly BEI participants.

Finally, the Business Equity Fund at the Boston Foundation provides access to growth capital for the businesses. The Fund is designed to provide both flexible financing and patient



capital that produces a modest return so, ultimately, it can be self-perpetuating. With a \$2 million initial investment from Eastern Bank, the goal is to grow the fund going forward. Access to growth capital is a cornerstone of the approach and early results are eye-opening.

After only a year, the first 10 participating businesses have hired a total of 88 employees and added \$11 million of revenue, in aggregate. Many have improved their organizational designs and created strategies to enter new markets or make acquisitions.

“We know that, as these companies grow, they will not only thrive,” says Orlando Watkins, Boston Foundation Vice President for Programs, “they will employ more people and build more wealth for people of color. And that will lift everybody up.”

**Business Equity Fund Investment Committee and Advisors (from left): Jared H. Ward, Anthony Rust, Demetriouse Russell, Corean Reynolds, Alfred F. Van Ranst Jr., Lizette Perez-Deisboeck, Antonio Lopez, Orlando Watkins, Glynn Lloyd and Greg Shell.**

# TOGETHER for Healthy Children and Families



## HEALTH STARTS AT HOME

Emergency room visits are down. So are stress levels and missed days of school. A sense of connection with neighbors is up, along with the intangible confidence that comes from positive change. These observations were shared at a gathering of front-line workers supported through Health Starts at Home (HSAH). They are housing advocates, community outreach workers, lawyers, intake coordinators and more. They gather periodically to share their ideas, victories and challenges.

They are charting new ground with a Boston Foundation initiative that brings together housing and health organizations to demonstrate the benefits of stable housing on children's



**From left: Stephanie Rodriguez, Wil Santana - Urban Edge; Iris Coloma-Gaine - Massachusetts Law Reform Institute; Vanessa Daneshvar, Elsa Villanueva - Metro Housing Boston; Nineequa Blanding, Soni Gupta - the Boston Foundation; Robert Torres, Urban Edge; Elsa Lizarralde, Boston Housing Authority; Francesca Crutchfield-Stoker, Boston Children's Primary Care at Martha Eliot Health Center**

health outcomes. Historically, the housing and health care sectors have operated on separate tracks. Health Starts at Home, a consortium of partnerships, changes that.

The initiative is crossing previously disconnected sectors and working in different ways with disparate service providers from small to mammoth. It is ambitious and complex, but so promising that the Foundation has been joined in supporting it by regional and national funders. Out of these pilot partnerships will come insights and best practices in identifying at-risk families, coordinating and integrating services, linking families to care networks and making the best use of existing services.

That's all very grand sounding at the high level, but it doesn't take long sitting among the case workers and other professionals from the partnerships to see that at every level

they are the lifeblood of the program. With profound care for the people they serve, they are personally learning new ways of interacting with counterparts across the health and housing landscape and continuing their tireless efforts to connect clients to resources. But there are rewards.

"The most rewarding aspect of my work is the trust that my clients have in me and believing that I will do my best to help them," says Housing Search Case Manager Elsa Villanueva of Metro Housing Boston. "My clients are so filled with kindness and gratitude when they speak with me. It makes it all worthwhile."

## THE PARTNERSHIPS

### **Building Bridges to Better Health:**

Boston Health Care for the Homeless Program, St. Mary's Center for Women and Children and Urban Edge

### **Chelsea Homes for Health:**

Massachusetts General Hospital and MGH Chelsea HealthCare Center, Metro Housing Boston, The Neighborhood Developers and Roca

### **Housing Prescriptions as Health**

**Care:** Boston Housing Authority, Boston Medical Center—Problem Solving Education, BMC HealthNet Plan, Children's HealthWatch, Medical-Legal Partnership, Nuestra Comunidad and Project Hope

### **Mortar Between the Bricks:**

Boston Children's Primary Care at Martha Eliot Health Center, Longwood Horizons for Homeless Children and Massachusetts Law Reform Institute

# \$2.9 Million

Total investment by the Boston Foundation and other local and national funders

TOGETHER  
for Strong  
Beginnings

*“Quality birth-to-five early childhood education for disadvantaged children can simultaneously reduce inequality and boost productivity in America.”*

JAMES HECKMAN

*Nobel Laureate in Economics and University of Chicago Economics Professor*

**An early childhood teacher with a young student at the Nurtury Learning Lab in Jamaica Plain**



# THE EARLY CHILDHOOD FUNDING COLLABORATIVE

# \$1.2 Million

Total funds committed to  
by the Early Childhood  
Funding Collaborative

# 37

Organizations supported  
in the first round of grants

For more than a decade, the Boston Foundation's education strategy has been focused on the entire arc of a person's life—from birth through college completion and beyond. In 2015, with the encouragement of the Foundation's Board of Directors—and a growing body of compelling research about the importance of early development—the Foundation began researching Boston's early childhood landscape with the goal of expanding its work in the area.

A deeply committed group of Boston Foundation donors, called the Early Childhood Funding Collaborative, played a central role in shaping the Foundation's strategy and providing the funding that would be needed to have a real impact. Its members include a retired pediatrician, several teachers, a physicist, a former child-care worker and a retired pediatric ophthalmologist—many of them also parents and grandparents. With their guidance, in late 2017, the Foundation announced its new early childhood strategy, and released a request for proposals.

Most of the grants, which were announced in July of 2018, totaling \$600,000, were funded by the Collaborative. The funding went to cross-sector partnerships involving some 37 different nonprofits and programs, all chosen for their efforts to seed or expand innovation among family-serving organizations.

“Some of our thinking in early childhood has been informed by the work of the economist James Heckman,” says Elizabeth Pauley, the Foundation's Associate Vice President of Education to Career. “His work proves that a person's success in life, health and emotional well-being have their roots in early childhood development.”

What is referred to as the “Heckman Equation” calls for investing in developmental resources for at-risk children; developing cognitive and character skills from birth to age five, when it matters most; and sustaining gains in early development with effective education through to adulthood. The result, Heckman maintains, is more capable and productive citizens who will pay dividends for generations to come.

## NURTURING OUR GREATEST RESOURCE

Marcia Kamentsky, an educator, admits that she can sound like she's on a soap box when it comes to the topic of early education. "Our greatest resource for the future is children," she says, "and, as a nation, we're not focused on what needs to be done to take care of that resource. We should be helping all families provide their children with the best quality educators and spaces for learning. And that is especially so for children who may be challenged in their everyday lives, who come to school or child-care settings with a lot of trauma."

Marcia and her husband Lou Kamentsky are members of the Early Childhood Funding Collaborative and are also leaving a major bequest to the Boston Foundation to benefit early education permanently.

"I see support of early childhood as among the best investments we could make," says Lou Kamentsky, a physicist whose work has been grounded in medical research. "Human development peaks around the age of three. That's the sweet spot for enabling capacity in intellectual and emotional intelligence. And because we're investing through the Boston Foundation, we know that our support of early childhood is going to programs and people who are likely to benefit most. And because of the influence of the Boston Foundation, successes from here can spread across the country—even the world."

**Early Childhood Funding  
Collaborative members  
Marcia and Lou Kamentsky  
in the Children's Room at  
the Boston Public Library**



# TOGETHER for the LGBTQ Community



**Leaders and grantees of the Equality Fund and authors of the *Equality and Equity* report, standing from left: Sean Cahill, The Fenway Institute; Catherine D’Amato and Scott E. Squillace, Esq., co-chairs of the Equality Fund. Seated from left: Stephen Chan, The Boston Foundation; Rabbi Sara Paasche-Orlow, Hebrew Senior Life; Timothy Wang, The Fenway Institute; and Tanekwah Hinds, Fenway Health**

While Massachusetts is considered by many to be the most welcoming state in America for members of the LGBTQ community to live, love and raise their families, a report published in May of this year by Boston Indicators, the Equality Fund and The Fenway Institute revealed that many are still struggling. A high percentage of young people are battling depression, even thoughts of suicide, and youth of color and transgender individuals are experiencing a tremendous amount of discrimination.

The good news, also shared in the report, is that Massachusetts has more supportive public policies and services than any other state in the nation.

And Greater Boston has the Equality Fund. Created in 2012 to support nonprofit organizations that serve and strengthen the LGBTQ community, the Equality Fund is stewarded by the Boston Foundation. Its grant-making priorities are guided by an Advisory Committee—community members and allies—who possess a depth and breadth of understanding about the most pressing issues affecting LGBTQ people.

Some 35 nonprofits serving the LGBTQ community have received support from the Equality Fund over the last six years. Grantees include: Fenway Health, an iconic institution that is central to the well-being of the LGBTQ community; the Boston Alliance of LGBTQ Youth, which provides young people with a warm place to gather and receive support; and GLAD, the advocacy and defense organization that was at the center of the successful fight to win marriage equality in this country.

Another grantee, the Massachusetts Transgender Political Coalition, also received this year's Boston Foundation "Out of the Blue" award, a \$50,000 surprise grant that is voted on by the Foundation's staff.

In addition to its current grant making, the Equality Fund is contributing to Greater Boston's legacy of equality and equity by building a permanent endowment within the Boston Foundation's Permanent Fund for Boston to benefit our city's LGBTQ community for years to come and to expand the progress that has been made in the last five decades well into the future.

## THE EQUALITY FUND AT THE BOSTON FOUNDATION

\$5  
Million

Documented legacy gifts to  
the Equality Fund to date

\$10  
Million

Goal for documented legacy gifts  
to the Equality Fund by 2020

TOGETHER  
with  
Our  
Donors

The following pages list just some of the Boston Foundation's donors. We thank them for their deep commitment to our community—today and into the future.

*To the extent that Boston thrives, it's because of the ingenuity and generosity of its people and their commitment to solving the big problems.*

*For more than 100 years, a tremendous amount of this ingenuity and generosity has lived in and through the Boston Foundation.*

# DONORS TO THE CIVIC LEADERSHIP FUND

The following individuals, families and businesses contributed to this year's annual campaign, which supports the Foundation's civic leadership work.

Their contributions allowed the Foundation to serve as a think tank and advocacy organization, publish research on the most important issues of our time, and bring people together to exchange ideas and inform public policy.

We thank them for their generosity and support.

## **\$100,000+**

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

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

Anonymous (3)  
Josh and Anita Bekenstein  
The Klarman Family Foundation  
Linda Mason and Roger Brown  
Dwight and Kirsten Poler

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

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Arthur Winn

## **\$10,000-\$24,999**

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Eileen and John M. Connors, Jr.  
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One8 Foundation  
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Wagner Foundation  
Robert L. and Jennifer S. Waldron

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Andrew and Melora Balson  
Blue Cross Blue Shield of Massachusetts  
Barry Bluestone  
Boston Consulting Group  
Boston Partners  
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Massachusetts General Hospital  
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Scott Nathan and Laura DeBonis  
National Grid USA  
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Tufts Health Plan  
Hans and Ann Ziegler

**\$2,500-\$4,999**

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**\$1,000-\$2,499**

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A.W. Perry, Inc.  
Carol and Howard Anderson  
Sean Apgar and Family  
Roger and Anne Berman  
Joan T. Bok  
Stephen and Alicia Bolze  
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Peter A. Brooke  
Gordon Burnes and Suzie Tapson  
Margaret Bush  
Jeffrey Busgang  
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Mr. Alfred D. Chandler  
Judith Chasin  
Ciccolo Family Foundation  
Commodore Builders  
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Catherine D'Amato and Debbi Ford  
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Joshua and Sarah Greenhill  
Paul S. Grogan and Lauren Louison Grogan  
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Kate R. Guedj  
John and Kathryn Hamill  
Hill Holiday  
Michael P. Hogan and Margaret M. Dwyer  
Thomas and Diane Hollister  
Nancy and Tom Howley  
The HYM Investment Group  
Income Research + Management  
Isaacson, Miller  
Ira Jackson  
Marcia and Louis Kamentsky  
Martin and Wendy Kaplan  
Paul and Mary La Camera  
Edward and Berthe Ladd  
J. Dayne Lamb and Gardner N. Stratton  
John and Nancy LaPann  
Garrett Larivee  
Barbara Leggat  
Robert L. and Judy B. Lindamood  
Linde Family Foundation  
Edward and Sydell Masterman  
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Robert Meenan  
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Daniel and Jennifer Sherman  
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C.A. Webb  
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Marshall and Katharine Wolf  
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### **The Shah Family Foundation**

Niraj Shah, founder of Wayfair, and entrepreneur Jill Shah, are major supporters of the Boston Foundation's civic leadership work through the Shah Family Foundation. Jill Shah is co-chairing the 2019 fiscal year campaign for the Civic Leadership Fund with Boston Foundation board member Brian Conway. "We invest in the annual campaign for the Civic Leadership Fund because we care deeply about the health and prosperity of our city and region," says Jill Shah. "The Boston Foundation and its many partners have a powerful track record of delivering on the issues that affect our families and our future."

## Up to \$999

Anonymous (9)  
Jon Abbott and Shari Malyn  
AccuRounds  
Rosalin Acosta  
Alchemy Foundation  
AmazonSmile Foundation  
Zamawa Arenas  
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W. Gerald Austen and Patricia Austen  
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Stephen Chan and Tim Schofield  
Charles Street A.M.E. Church  
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Amy R. Lonergan  
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Keith A. Mahoney  
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George and Isa Zimmerman  
Sasha Zuflacht

# GROWING THE PERMANENT FUND FOR BOSTON

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

## DONORS TO THE PERMANENT FUND FOR BOSTON

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

Anonymous (1990, 2001, 2002, **2010, 2016, 2018**)

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**Joseph E. Corcoran (2016)**

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**Sandra and Paul Edgerley (2015)**

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**The Flow Fund (2015)**

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Vingo Trust II (1994)

### Three of Our Centennial Circle Donors



Paul and Sandra  
Edgerley



Jaishree and Desh  
Deshpande



Joe Corcoran

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

Anonymous (16) (1992-2016)  
Estate of Alice A. Abbott (1967)  
Rosalin Acosta (2013)  
Pamela D. Adams (2016)  
Estate of Edith Allanbrook (2003)  
Estate of Emily T. Allen (2007)  
Margaret Shaw Allen Trust (1982)  
Estate of Matilda S. Alley (1964)  
Estate of Miriam S. Alley (1965)  
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Estate of Frederick W. Bridge (1942)  
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Peggy A. Brown (2008)  
Katherine H. Browning Trust (1991)  
Henry Burkhardt, III (1986)  
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Catherine and Paul Buttenwieser Foundation (1991)

Cabot Family Charitable Trust (2001)  
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Fay M. Chandler (2001)  
Estate of Gladys Chiquoine (1983)  
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Estate of Helen A. Clafin (1992)  
Estate of William H. Clafin (1983)  
Combined Jewish Philanthropies of Greater Boston (1991)  
Commonwealth of Massachusetts (2009)  
Estate of Anastasia Conte (1988)  
Ford H. Cooper Trust (1982)  
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Edward Hyde Cox Trust (2001)  
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Estate of Arthur S. Cummings (1943)  
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Estate of Charlotte E. H. Curtis (1940)  
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Gladys Dean Trust (1977)  
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Luisita L. Denghausen Trust (1990)  
Martin Deutsch (1997)  
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Estate of Mary Frances Drown (1929)  
Wm. Arthur Dupee Memorial Fund (1984)  
Dusky Foundation (2013)  
Eastern Bank Charitable Foundation (2014)  
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Estate of Barbara B. Fontaine (1997)  
Martha M. Fosdick Fund (1978)  
Estate of Edith R. Fottler (1948)  
Ruth S. Frake Trust Bequest (1981)  
Lucille Francis (2015)  
Estate of Alma L. Frost (1948)  
Estate of Anna C. Frothingham (1941)  
John Lowell Gardner Fund (1987)  
Estate of Forrest C. Gates (1970)  
Estate of Mary M. Geist (1982)  
Estate of Pauline S. Germeshausen (2006)  
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Estate of Anne C. Gray (2010)  
Donald Gregg (1963)  
Estate of Patricia Grisham (1964)  
Estate of Joseph Guild (1964)  
Estate of John H. Hagopian (2002)  
Estate of Ellen Page Hall (1931)  
Jean Hanlon (1991)  
Estate of Dorothy C. Harris (1967)  
Carrie A. Hartley Trust (1963)  
Estate of Elizabeth M. Hay (1972)  
Haymarket People's Fund (1994)  
Estate of Fred R. Hayward (1969)  
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Vladimir N. Herteli Trust (2003)  
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Estate of Anna P. Hills (1969)  
Estate of Harry Holland (2008)

Estate of Grace Scott Hollett (2005)  
 Estate of Agnes G. Homes (1961)  
 Katherine B. Hood (2001)  
 Estate of Adeline D. Hooper (1973)  
 Estate of Mary Frothingham Hooper (1961)  
 Estate of Elizabeth B. Hough (2000)  
 Donald J. Hurley Memorial Fund (1978)  
 Jane W. Hyman (2002)  
 Mark Hyman, Jr. Trust (1999)  
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 International Council Trust (2000)  
 Greg and Maria Jobin-Leeds (2015)  
 Stephen P. Jonas (2007)  
 Cyril H. Jones Trust (1974)  
 Ross Jones and Emily Nielsen Jones (2015)  
 Estate of Frances A. Jordan (1978)  
 Estate of Ethel M. Joy (1993)  
 Louis and Marcia Kamentsky (2013)  
 The Keane Family Foundation (1997)  
 Mr. and Mrs. John F. Keane (2001)  
 Estate of Paul Kimball (1964)  
 Pauline Kleven Trust (1990)  
 Estate of James G. Knowles (1982)  
 Dr. and Mrs. Arthur R. Kravitz (1987)  
 Estate of Louise P. Kush (1997)  
 Aimee Lamb Trust in memory of Winthrop and  
 Aimee Sargent (1980)  
 Estate of Ida Fales Lamb (1967)  
 Lambert Marital Trust (2007)  
 Mr. and Mrs. Herbert Lee (1999)  
 Thomas Lee (1997)  
 Barbara Estabrook Livermore Trust (1982)  
 Caleb Loring Jr. and Rosemary M. Loring (1997)  
 George and Ellen Lovejoy (2015)  
 Cora E. MacKenzie Trust (1973)  
 Mr. and Mrs. Gael Mahony (1982)  
 Anna E. Markus (2016)  
 Estate of Clara N. Marshall (1943)  
 Adalaide Sargent Mason Trust (1982)  
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 Estate of Ann G. McFarlane (2000)  
 Ethel Fay McGuire Trust (1973)  
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 MFS Investment Management (2014)  
 David D. Moir Revocable Trust (1991)  
 Estate of Arthur W. Moors (1950)  
 Reinier Moquete (2014)  
 Gertrude Morrison Trust (1965)  
 Estate of John Wells Morss (1940)  
 Wilbert G. and Eunice Muttart Foundation  
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 Mrs. Robert B. Newman (2001)  
 Nixon Peabody LLP (1997)  
 Northern Trust (2006)  
 The Overbrook Foundation (1990)  
 Francis Ward Paine Foundation, Inc. (1982)  
 Estate of John Adams Paine (1967)  
 Estate of Winthrop D. Parker (1967)  
 Partners HealthCare System, Inc. (2014)  
 Theodore G. Patterson Trust (2004)  
 Estate of Mary F. Pearl (1997)  
 Estate of Annie S. Penfield (1979)  
 Phillip Perelmutter (2014)  
 Janet S. Perkins Charitable Remainder Unitrust  
 (2000)  
 Philanthropic Collaborative, Inc. (2000)  
 Estate of Blanche E. Philbrick (1965)  
 Hetty R. Phillips Trust (1980)  
 Estate of Mary N. Phillips (1974)  
 Estate of J. Christie Pingree (1957)  
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 William J. and Lia G. Poorvu (1997)  
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 (1992)  
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 Esther Frances Quinn Trust (1995)  
 Mr. Robert A. Radloff (2000)  
 Estate of Bertha J. Richardson (1975)  
 Estate of Frank L. Richardson (1975)  
 Estate of Charles E. Riley and Agnes Winslow  
 Riley (1972)  
 Mabel Louise Riley in memory of Charles  
 Edward (1972)  
 Harry & Minnie Rodwin Memorial Fund (1975)  
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 Estate of Helen S. Sharp (1966)  
 Estate of Frank R. Shepard (1954)  
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 Estate of Anne G. Shewell (1984)  
 J. de Vere Simmons Trust (1985)  
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 Smith (1968)  
 Edson B. Smith Trust (1984)  
 Estate of Eleanor Smith (1986)  
 Irene C. Smith Trust (1975)  
 Reynolds R. and Pamela M. Smith (2006)  
 Florence Snelling Trust (2006)  
 Dr. William Davies Sohie, Jr. (1990)  
 Helen Spaulding (1990)  
 Spaulding-Potter Charitable Trusts (1972)  
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 Estate of Mary P. Stone (1948)  
 Stephen and Sybil Stone Foundation (2003)  
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 Tech/Ops, Inc. (1982)  
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 Estate of Lenna R. Townsend (1952)  
 Margaret Castle Tozzer Trust (1978)  
 United Asset Management Corporation (1997)  
 Estate of Willis S. Vincent (1940)  
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 Clara Wainwright (1998)  
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 Estate of John M. Ward (1927)  
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 Estate of Madeline Cobb Webber (1973)  
 Edwin S. Webster Foundation (2000)  
 Estate of Louise M. Weeks (1944)  
 Estate of Arthur W. Wheelwright (1963)  
 Estate of Stetson Witcher (2008)  
 Estate of Joseph A. White (1979)  
 Estate of Edward E. Williams (1950)  
 Estate of Lizzie A. Williams (1951)  
 Estate of Mary Denny Williston (1998)  
 Winston Salem Foundation (1991)

## LEGACY SOCIETIES

Members of the Boston Foundation's Legacy Societies are deeply committed to providing the Boston Foundation with the resources it will need—not only today, but into the future—in order to meet the ever-changing needs of our community. We thank these generous donors and honor them here.

## CENTENNIAL SOCIETY

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

Anonymous (6)  
Diane DeSerras Arenella  
James F. Becker and Randal D. Rucker  
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Belden, Pamela, and Andrew Daniels  
Richard and Marcia DeWolfe  
Michael and Barbara Eisenson  
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Grace and Edward Fey  
Atsuko and Larry Fish  
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J. Dayne Lamb and Gardner N. Stratton  
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Joseph G. Prone Foundation  
Lindsey A. Rosen  
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Sandra M. Stark  
Mark and Grace Sullivan



*Wendy Shattuck along the Emerald Necklace*

### **Sam Plimpton and Wendy Shattuck**

Wendy Shattuck is the former chair of the Emerald Necklace Conservancy and founder of the annual Party in the Park to benefit the Conservancy and the parks it works to preserve. She and her husband, Sam Plimpton, have made a generous legacy commitment to the Boston Foundation's Permanent Fund for Boston. "We feel the Boston Foundation is the right place to harbor our legacy," says Shattuck. "Like the Emerald Necklace, the Foundation will always be here."

## LONGLEY LEGACY SOCIETY

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

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Barry B. Corden  
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Binkley and Paula Shorts  
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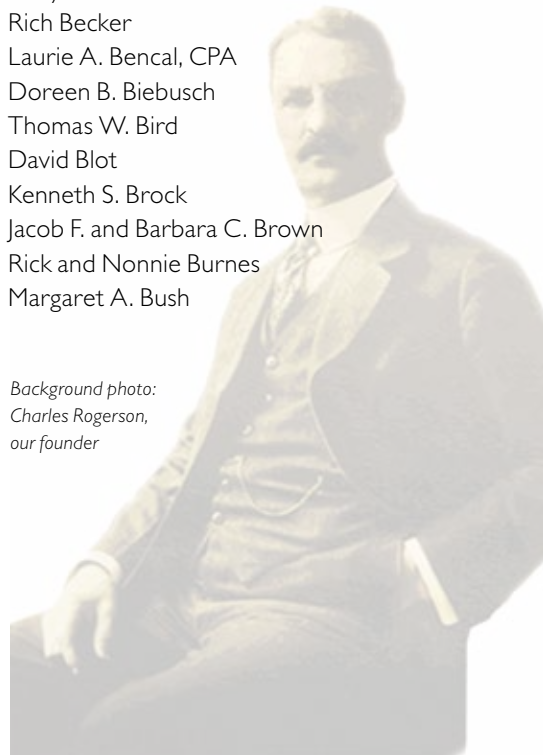
*Background photo: James Longley, our first major donor*

# ROGERSON LEGACY SOCIETY

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

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*Background photo:  
 Charles Rogerson,  
 our founder*



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 Gary P. Kearney, M.D. and Susan Kearney  
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 Alan and Pamela Trefler  
 Joy E. Van Buskirk  
 Peter S. and Pamela L. Voss  
 Robert R. Wadsworth and Catherine E. Moritz  
 J. H. Walton, Jr. and Carolyn Walton  
 Inge J. Wetzstein  
 Constance V. R. White  
 Eric S. and Linda H. White  
 Jeffrey and Theresa Whitehead  
 Michael N. and Mary M. Wood

\*Deceased

## FUNDS

### PERMANENT FUND FOR BOSTON

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

### UNRESTRICTED FUNDS

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

Emily Tuckerman Allen Fund (2006)

**Anonymous Fund X (2018)**

Area IV Fund (2015)

Geno A. Ballotti Fund (1985)

Irene W. Bancroft Fund (1997)

James R. Bancroft Trust Fund (1985)

Harriett M. Bartlett Fund (1988)

J. E. Adrien Blais Fund I (1968)

The Barry Bluestone and Marry Ellen Colten Legacy Fund (2017)

Franklin S. & Cynthia B. Browning Fund (1989)

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

James Dean Fund (1947)

Katherine E. Dooley Fund (1998)

Herbert and Lucy Fields Fund (2009)

Edward Glines Fund (1939)

Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2010)

Nathaniel Hooper Fund (1939)

Grace A. Jacobs Fund (1989)

Karoff Fund for Leadership in Philanthropy (2017)

Michael B. Keating Fund for Justice and Social Equity (2016)

Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2007)

Polaroid Fund (1997)

Ruth M. Reiss Memorial Fund (1997)

Samuel H. & Lizzie M. Robie Trust Fund (1983)

Walter J. & Marjorie B. Salmon Fund (1999)

Robert Wadsworth Fund for the Future of Boston (2008)

#### The Karoff Fund for Leadership in Philanthropy



The Karoff Fund for Leadership in Philanthropy was established in 2017 to honor Peter Karoff, who was a pioneer in the field of strategic philanthropy. He founded The Philanthropic Initiative (TPI), which now is under the umbrella of the Boston Foundation and a leading influence in the world of philanthropy. The fund is being used to support and disseminate research, writing and other projects that inform, inspire and support the next generation of philanthropic leaders.

## FIELD OF INTEREST FUNDS



*Brother Thomas Fellow Jean Appolon*

### The Brother Thomas Fund

Jean Appolon is a choreographer, dance educator—and one of 44 Brother Thomas Fellows who have received \$15,000 in unrestricted funds to support their art in any and all media in Greater Boston. The Brother Thomas Fund was established in 2007 with a bequest from Brother Thomas, a Benedictine monk and ceramic artist who wanted his legacy to be helping individual artists. Since then, 44 Fellows have received support totaling \$660,000.

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

**Greater Boston After School Arts Fund (2018)** To support out-of-school time youth programming through community-based organizations

Solomon Agoos Fund (1987) For popular education, instruction and dissemination of information in the field of ethics

Arts Fund (1998)

Edith Allanbrook Fund (2003) To provide for children with extraordinary promise in the area of the arts

Boston Parks Access Fund (2003) To the Boston Parks Department or to the administrators of other public park land within the City of Boston boundaries

Free For All Fund (2014) To ensure that everyone from the Boston region will have regular and permanent access to the rich world of classical, orchestral music and related cultural events

Edward Hyde Cox Fund (2001) For support of programs involving classical music, painting and/or sculpture

Anna Faith Jones Arts Fund (2001) 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) To arts, cultural and community-based nonprofit organizations conducting arts and cultural development projects or studies that promote job creation, housing and economic development in Greater Boston

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

Brother Thomas Fund (2008) To support struggling artists working in any and all media in the Greater Boston area

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

Edith M. Ashley Fund (1961) Primarily for the aid of blind and physically disabled persons

Diane Heath Beever Memorial Fund (2008) To support substance abuse treatment including alcoholism and drug addiction/dependence; and/or mental illness

J. E. Adrien Blais Fund II (1968) For the relief, support or assistance of poor or needy Massachusetts residents

J. E. Adrien Blais Fund III (1968) For the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease

Emily Budd Fund (1961) For fresh air vacations for under-privileged children

**Business Equity Fund (2018)** To increase employment opportunities in minority business enterprises in the Greater Boston area

Camping Associates of Roslindale & Milton Fund (1982) 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 (1994) 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
- David W. Cushing Fund (1988) For such charitable work as shall assist young people, particularly women
- DACA Dream Fund (2018)** To support the DACA application process for eligible Dreamers or for other pressing immigration related needs in Massachusetts
- Mabel Walsh Danforth Fund (1950) For education, assistance or relief of physically disabled children
- Virginia Herrick Deknatel Fund for Children's Services (2002) To be used for children's services
- Major Arthur M. Diggles Foundation Fund (1993) To aid Massachusetts 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 (1966) To promote the welfare of boys and girls and young people
- Kate Ellis Fund (1954) For convalescents, children, blind and deaf persons, and homes for elderly Protestant men and women, especially charities outside of Boston.
- Equality Fund (2012) For organizations that serve the LGBTQ community of Greater Boston
- Mary C. Farr Arts Fund (2006) For the enhancement of cultural affairs in Boston including scholarships and support for needy residents of Boston
- The Flow Fund (2015) For issues specifically addressing hunger, homelessness and heating
- Frederika Home Fund (1980) For the benefit and welfare of elderly men and women, and for research into the care of the elderly
- General Support Fund for Education (1989)
- Elizabeth D. Goldsmith Fund for Families (2011) To support families in the greater Boston area
- Charles W. Hapgood Trust Fund (1987) For educational purposes at MIT or a similar institution, and for the promotion of health and the alleviation of suffering at Massachusetts General Hospital or a similar institution
- Harcourt Family Fund (2002) 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
- Mary Harris Fund (1941) For widows and single women in straitened circumstances
- Grace L. Holland Fund (2008) To assist in the rehabilitation of handicapped children
- Theodore C. Hollander Trust Fund (1929) For hospitals, education and the improvement of American citizenship
- Jacoby Club of Boston Fund (1984) To provide kind, 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 (1963) For the benefit of poor people in or near Jamaica Plain, particularly for health related needs
- Charles Frederick Joy and Dora Marie Joy Fund (1993) 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
- King Boston (2018)** To create, maintain and support a memorial to Martin Luther King, Jr. and Coretta Scott King in the City of Boston and other activities related to their legacy
- Kraft Family Non-Profit Emergency Fund (2015) For rapid response assistance grants to small- and mid-size 501c3 nonprofits that experience unforeseen expenses as a result of factors outside of the organization's control or that could not be anticipated by the organization, including, among other things, expenses related to critical facility, administration or program needs
- Louise P. Kush Fund (2016) For the enhancement of the quality of life for the homeless of Greater Boston
- Edith Shedd Larsen Fund (1963) To aid and advance research toward the cure and relief of arthritis
- Latino Legacy Fund (2012) To strengthen and advance the socioeconomic status and leadership capacity of Latinos by supporting issues and organizations with the greatest impact on the Latino community and maintaining and increasing a permanent endowment
- Maude A. MacNaught Fund (1980) Preferably for children suffering from diseases of the eye
- Azad & Doris Maranjian Charitable Trust Fund (2009) To be used for organizations helping the disabled in achieving greater autonomy, to organizations committed to maintaining the physical health of the general population as well as targeted populations of the disabled, to nonprofits dedicated to cultural and educational enrichment and to nonprofits dedicated to preserving and defending the Constitution
- Massachusetts Civic League Fund (1984) To promote sound government
- Massachusetts United for Puerto Rico (2018)** To support Puerto Ricans relocating to Massachusetts after Hurricane Maria and recovery on the island
- Willis Munro Fund (1990) 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 (1954) Preferably for the care of elderly Protestant men and women
- Florence Arnaud Newton Fund (1956) For the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1955) For aid to needy gentlewomen
- Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) To be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care
- Norman Everett Pearl Fund (1997) 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 providing musical programs for the general public and which are located in the metropolitan Boston area
- Petersen Family Fund for the Environment (2016) For issues of preservation, conservation, and sustainability of open spaces, food, and urban agriculture, and the prevention of climate change, with preference given to investments in advocacy, public awareness, policy, and constituency building
- 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
- David R. Pokross Fund for Children in Need (1997) For organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Alice F. Rosenquist Fund (1985) With preference to organizations that assist the elderly or blind
- Fund for Self-Reliance (1989) For developing long-term solutions which go beyond traditional emergency responses to homelessness
- Louis Agassiz Shaw Fund (1992) For the benefit of under-privileged children
- Katherine Dexter Shelman Fund (1955) For the benefit of worthy aged people
- Arthur L. Sherin and Frances C. Sherin Fund (2003) For aid to the blind or disabled, the 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 designed to bring about improvements in adoption procedures for the better matching of adopting parents and adopted children
- Sophia Snow Fund (1949) For care and support of destitute children of Roxbury
- 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 (1936) For summer vacations for needy children of Greater Boston
- Nelson E. Weeks Fund (1938) For alleviation of suffering in the major Boston hospitals
- Fanny Wharton Fund (1920) For the relief of poor, sick young women and children
- Katherine C. Wheeler Fund (1988) To increase knowledge of good government and for the encouragement of good citizenship
- Fund for Preservation of Wildlife & Natural Areas (1994) To maintain, in their natural condition, woodlands, open areas, wet lands, wildlands, beaches and marshes; to preserve and propagate natural vegetation and wildlife, to maintain and preserve lands under cultivation in order to demonstrate scientific principles of conservation; to produce, publish and disseminate information, educational and other material designed to promote the foregoing purposes, and to educate people to recognize the value of preserving our natural areas, vegetation and wildlife
- Herbert Farnsworth Fund (1994) For land acquisition for preservation or for any purpose the Fund for Preservation of Wildlife and Natural Areas supports
- Hollis D. Leverett Memorial Fund (1994) For planting and upkeep of trees, shrubs and other plants which promote and encourage bird life, primarily on land in New England owned or controlled by conservation organizations
- Ruth and Henry Walter Fund (2011) To maintain, in their natural condition, woodlands, open areas, wet lands, wildlands, beaches and marshes; to preserve and propagate natural vegetation and wildlife, to maintain and preserve lands under cultivation, to produce, publish and disseminate information, educational and other material designed to promote the foregoing purposes
- Arthur L. Williston and Irene S. Williston Trust For Education (1954) To provide assistance, educational aid and training at institutions other than usual four year colleges
- Mary Denny Williston Fund (1970) For summer camp vacations for children; for work with alcoholics
- Window Shop Fund (1989) 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 (1970) For widows and single women in straitened circumstances

## DONOR ADVISED FUNDS

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

**The year the fund was established is listed in parentheses and new funds are bolded. In addition to the 37 new Donor Advised Funds listed in bold, there was one new anonymous Donor Advised Fund in fiscal year 2018.**

\$30K for 30 Years (2017)

3C Fund (2013)

63 Marlborough Street Fund (1985)

A & E Educational Quest Fund (2005)

AADS Memorial Fund (2005)

Walter and Alice Abrams Family Fund (2006)

Abromowitz/Ruttenberg Family Fund (2001)

Acacia Fund (2005)

Adler Family Fund (2006)

Adlib Foundation (2010)

Adopt-A-Statue Endowment Fund (1988)

Adopt-A-Statue Program – Bill Russell Legacy Project (2014)

Affinity Services Corporation Fund (2003)

The Akili Fund (2016)

James F. Alenson Memorial Fund (2007)

Aley Fund (2010)

Aliad Fund (1994)

**Linowes Alinsky Philanthropic Fund (2018)**

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

Rosamond W. Allen Charitable Fund (2004)

Dwight & Stella Allison Fund (1982)

Alper Family Fund (1996)

George and Nedda Anders Fund (1992)

Barbara Jane Anderson Fund (2000)

Ashley Anderton Memorial Fund (2017)

Selma and Bayness Andrews Fund (2007)

Michael & Ellen Angino Fund (1998)

Anony Fund (1999)

Ansara Family Fund (2006)

Anthes Weitz Family Fund (2015)

Anthropologists' Fund for Urgent Anthropological Research (1996)

APOC Fund (2012)

Arba Lifnot Boker Fund (1993)

Arch Stanton Charitable Fund II (2016)

Armony Erel Charitable Fund (2009)

Atalaya Fund (2013)

Atlantic Fund (1998)

Ausschnitt Fund (2005)

Victoria J. Avery Charitable Fund (2015)

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

Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)

Back Porch Fund (2015)

Bagley Family Fund (2016)

**Bain Capital Relief Fund (2018)**

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

M. Baldwin Family Fund (2016)

Balzer/Bellinger Fund (2008)

John & Judith Barber Fund (2003)

Richard Allan Barry Fund (2003)

Hanna and James Bartlett Fund (2015)

Baudanza Family Fund (1998)

Baupost Group Charitable Fund (2004)

Beachcomber Fund (2008)

Belinda Fund (2011)

Benjamin Foundation (2006)  
William D. & Mary E. Benjes Fund (1985)  
Jane Bernstein Fund (2006)  
Best Doctors Charitable Foundation (2011)  
Charlotte Saltonstall Bigham Memorial Fund (2005)  
Bird Fund (1999)  
Bill Bither Charitable Fund (2014)  
Bitpipe Legacy Fund (2005)  
Black Philanthropy Fund (2009)  
NICSA/William T. Blackwell Scholarship Fund (1995)  
Emmanuel and Jane Blitz Fund (1993)  
**Blue Piano Fund (2018)**  
Tom and Lisa Blumenthal Family Foundation (2006)  
Joan T. Bok Fund (1998)  
Bolze Family Fund (2013)  
The Bonomo Family Fund (2017)  
**David Bor and Henrietta Barnes (2018)**  
Boston City Hospital Social Service Fund (1981)  
BPE/Bank of Boston 200th Anniversary Fund (1983)  
Braverman Family Fund (1993)  
Bride/McEnany Fund for Safer Women (2014)  
Bronner Charitable Foundation (2006)  
Brooke Family Donor Advised Fund (2008)  
Peter A. Brooke Fund (1999)  
Peter W. and Ruth H. Brooke Fund (2004)  
**Brumme Family Fund (2018)**  
Buckman Fund (2011)  
Dean Bullock Family Fund (1998)  
Bill and Barbara Burgess Fund (2003)  
William T. Burgin Fund (2001)  
John A. Butler Memorial Fund (1989)  
Kairos Butler Fund (1994)  
Butler's Hole East (2012)  
Butler's Hole Fund (1995)  
Butler's Hole North (2012)

Butler's Hole South (2012)  
**The Byong Uk Chung Memorial Fund (2018)**  
C & K Foundation Fund (2000)  
Norman L. Cahners Fund (1984)  
Campbell Foundation Fund (2003)  
A. Bruce Campbell Fund (2002)  
Krystle Campbell Memorial Fund (2013)  
**James E. Canales and James C. McCann Fund (2018)**  
**Carbonite Charitable Fund (2018)**  
C. Alec and Sarah O' H. Casey Charitable Fund (1994)  
Ellen W. Casey Fund (1994)  
Margaret W. Casey Fund (1987)  
John J. Cattaneo III Fund II (2017)  
Champa Charitable Foundation Fund (2003)  
Charlestown Benevolent Fund (2011)  
Charlestown Fund (2009)  
Chasin/Gilden Family Fund (2000)  
Charles Ezekiel and Jane Garfield Cheever Fund I & II (2006)  
Chelsea Community Fund (1998)  
Joyce Chen and Helen Chen Foundation Fund (1995)  
Cherry Stone Archives Fund (2011)  
Chertavian Family Fund (2006)  
**The Mitchell D. Chester Memorial Fund (2018)**  
Christ on Earth Fund (1989)  
Michael W. Christian Memorial Fund (1987)  
Dr. & Mrs. B.U. Chung Fund (2000)  
Chung Family Fund (2000)  
Churchill Family Fund (1997)  
Circle Fund (1998)  
Civic Engagement Fund (2011)  
CJE Foundation Fund (2007)  
Clark Family Fund (2011)  
Clarke Fund (1988)  
Clementine Fund (2015)  
Coit Family Fund A (2002)

Colby Charitable Fund (1981)  
Colony Road Fund (1997)  
**Commonwealth Children's Fund (2018)**  
Condor Street Fund (1989)  
Karen and Brian Conway Fund (2017)  
The Pat Cooke Fund (2016)  
Coolidge Family Fund (1982)  
Cooper Leaser Family Fund (1997)  
Stephanie Dodson Cornell and James Cornell Family Foundation (2016)  
Corvelli Fund (1996)  
Constance and Lewis Counts Fund (1991)  
Demetrios G. C. & Kimberly A. Coupounas Fund (1997)  
George D., Angelyn K. & Demetrios G.C. Coupounas Fund (1995)  
Jessie B. Cox Charitable Trust Fund (2009)  
Jessie B. Cox CLT - Cox Family Fund (2010)  
Coxhead Family Foundation (2017)  
Crane Fund (2012)  
Joseph Craven Family Fund (2014)  
Cregan Charitable Fund (2005)  
Crosby Family Fund (2000)  
Kate Crozier Fund (2008)  
Cuming Family Endowment Fund (1996)  
Cummings Foundation Fund at The Boston Foundation (2017)  
Tarrant and Laura Cutler Charitable Gift Fund (2009)  
John Da Silva Memorial Fund (1989)  
Dainger Fund (1998)  
Dammann Boston Fund (2004)  
Lawrence B. and Elisabeth T. Damon Charitable Fund (2014)  
Daniels Fund for Aspiring Boston Youth (2015)  
Darling Family Fund (1983)  
Kimberly Dawson Charitable Fund (2012)  
John H. Deknatel Family Fund (2010)  
Marshall and Laura Derby Charitable Fund (2008)

Rebecca Derby and Evan Morton (2008)  
 Sarah Derby and Gary MacDonald (2008)  
 DeWolfe Family Fund (2001)  
 Dibble Family Fund (2006)  
 Larry DiCara Fund (2006)  
 Dillon Fund (2005)  
 Dintersmith-Hazard Foundation Fund (2007)  
 Doe Noordzij Fund (2002)  
 Eugene B. & Nina L. Doggett Charitable Fund (2000)  
 Eric Dolinski & Kristen Ploetz Fund (2015)  
 Marthanne Dorminy Fund (2015)  
 Drane Center Fund (2002)  
 Douglas Drane Family Fund (1984)  
**Dretler Family Fund (2018)**  
 Dryfoos Family Fund (2013)  
 William J. Ducas Charitable Fund (2012)  
 Bill and June Duggan Fund (2017)  
 Rebecca F. Duke Charitable Fund (2016)  
 Dupre-Nunnelly Charitable Gift Fund (2007)  
 The Eagle Fund (2001)  
 Ecclesia Mission Fund (2013)  
 Edgerley Family Fund (2012)  
 Egozy Fund (2007)  
 Eisenson Family Fund (2005)  
 Stephen J. Elledge (2017)  
 Elliott and Yu Education Fund (2012)  
 Ellis Family Fund (2003)  
 Elphaba Fund (2014)  
 Elpus Family Fund (2015)  
 Elving-Carr Family Fund (2016)  
 Employment Retention Fund (2004)  
 Ethics Trust Fund (1994)  
 Evans Family Fund (2000)  
**Connor Evans Fund (2018)**  
 Norris & Constance Evans Charitable Fund (2000)  
**Taylor Evans Fund (2018)**

The Ewing Family Fund (2014)  
 Faber Daeufer & Itrato Fellowship Program (2017)  
 Peter and Ellen Fallon Fund (1998)  
 The Farlovia Fund (2017)  
 Steven D.H. Farrell Fund (2013)  
 Carol Fazio Charitable Fund (2011)  
 First Principle Fund (2006)  
 Fish Family Fund (2010)  
 Fishreys Family Philanthropic Fund (2000)  
 Jack Florey Fund (2005)  
 Flower Hill Fund (2012)  
 Foote-Richards Family Foundation (2014)  
 Forshey Family Fund (1998)  
**James & Audrey Foster Charitable Foundation (2018)**  
 Free for All Concert Fund (2011)  
 Niki & Alan Friedberg Fund (1987)  
**The Linda Friedman Memorial Fund (2018)**  
 David Frisbie Family Charitable Fund (2011)  
 Fulkerson Family Fund (1999)  
 Lyle W. Fulkerson Fund (1999)  
 Sarah Fulkerson and Robert Le Roy Family Fund (1999)  
 Fuller Trust, Inc. Fund (2010)  
 Future Fund (2006)  
 Gabrieli Family Fund (1998)  
 Gaffney/Kames Foundation Fund (1997)  
 Galilean Fund (2008)  
 Ganesh Fund (2002)  
 Gannon Family Charitable Fund (2004)  
 Gannon Family S.U.N. Fund (2010)  
 John Lowell Gardner Fund (1987)  
 Garuda Fund (2008)  
 Brad Gatlin Family Fund (1996)  
 Gaudette Family Fund (2000)  
 Gergen Family Fund (2010)  
 Gilbert Fund (2008)



### **The Gilbert Fund**

Through the Gilbert Fund at the Boston Foundation, Jennifer Gilbert has made a major commitment to the Foundation's work in the area of early childhood. She participates in the Early Childhood Funding Collaborative, which is made up of donors who have come together to play a key role in shaping the Foundation's strategy in the area of early childhood. The Collaborative's members also have committed a total of \$1.2 million to support this important work. "Working with other donors and the Foundation's staff who share this interest is both gratifying personally and effective for making an impact beyond what I alone can do," says Gilbert. "It's one of the benefits of being a part of the community at the Boston Foundation."

Ginsberg/Kaplan Fund (2011)  
Giudice Family Fund (2012)  
Glassman Gale Family Fund (1985)  
Carol R. & Avram J. Goldberg Fund (1984)  
John & Ethel Goldberg Fund II (1984)  
Golden Family Fund (2001)  
Peter G. Gombosi Memorial Fund for Autism Research and Services (2006)  
The Goodman-Swindell Family Foundation (2015)  
Goodworks Fund (2003)  
Gordon Educational Fund (2002)  
Gordon Place Charitable Fund (2012)  
Sandra & Philip Gordon Family Foundation Fund (2002)  
Laurie Gould and Stephen Ansolabehere Fund (2010)  
Gravelley Springs Fund (2006)  
Green Fund (2011)  
Greenhill Family Charitable Fund (2014)  
Grogan Fund (2012)  
Patricia H. Gross Fund (2000)  
Elizabeth and Phillip Gross Family Foundation (2015)  
Grunebaum Charitable Fund (2007)  
Gualala Fund (1991)  
Guenzel-Pieters Family Fund (2009)  
Charles & Dorothy Gullickson Fund for Social Change (1999)  
Jay Habegger and Christine Nagle Fund (2005)  
Hack.Diversity (2017)  
Belle Linda Halpern Family Fund (2013)  
Ken and Becky Hansberry Fund (2001)  
J. Allan Hauter Memorial Fund (2004)  
Hebb Charitable Fund (2004)  
HEIRS Fund (1997)  
Henderson Fund (1997)  
The Hesperia Fund (2016)  
Hewitt Family Charitable Trust Fund (1994)

The Hidden Garden Fund (2016)  
Hidden History Fund (2017)  
Higgins Endowed Fund (2012)  
Higgins Family Fund (2014)  
Ann S. Higgins Fund (2002)  
Hildreth Stewart Fund (2013)  
Joanne K. Hilferty Fund (2017)  
Lucius T. Hill III and Wendy Y. Hill Fund (2001)  
Petie Hilsinger Fund (2000)  
Marc Hirschmann Foundation Fund (2002)  
Hoffman Fund (1987)  
Holberger Family Fund (1994)  
Holland Family Fund (1994)  
Emily C. Hood Fund (2012)  
Gilbert H. Hood Family Fund (1981)  
Robert Hooper Family Fund (2005)  
**The Hot Chocolate Fund (2018)**  
Hourless Fund (1998)  
Hamblin L. Hovey Institute Fund (1983)  
Hoyt Family Fund (2001)  
Hunt Fund for Charlestown Children (2002)  
**Brian R. Hyde Foundation (2018)**  
Income Research and Management Charitable Fund (2014)  
Interstitial Fund (2010)  
**The Irza-Leggat Family Charitable Gift Fund (2018)**  
J. Jill Compassion Fund (2002)  
Mitchell & Diane Jacobs Fund (1999)  
Jade Fund (2008)  
JAHELBE Fund (2002)  
Hope and David Jeffrey Fund (2012)  
Jewel Family Fund (2017)  
Jochkan Charitable Fund (2002)  
Julia and Peter Johannsen Charitable Fund (2016)  
Stephen G. & Rosemarie Torres Johnson Family Fund (2000)

Jonas Family Fund (2000)  
Hubie Jones Fund (2004)  
Samuel Lamar Jordan Trust Fund (2001)  
The Joy Fund (2017)  
Jumping Rock Fund (2001)  
Louis and Marcia Kamentsky Donor Advised Fund (2010)  
Albert J. & Diane E. Kaneb Family Fund II (1997)  
Beton M. Kaneb Fund (1984)  
Kaplan Family Foundation (2017)  
Martin & Wendy Kaplan Fund (2007)  
**Kaplan-Barletta Family Fund (2018)**  
Kassler Family Fund (2000)  
Kaufer Family Charitable Giving Fund (2005)  
Kaye Charitable Fund (2004)  
John & Anne-Marie Keane Foundation Fund (1998)  
Keewaydin Fund (2002)  
Sabina F. Kelly Catholic Charitable Fund (1992)  
Kensington Capital Children's Fund (2002)  
Keogh Family Fund (2001)  
Kidder SBSM (Strong Body, Strong Mind) Fund (2005)  
Kidder Smith Fund (2003)  
M. R. Kidder Charitable Fund (2005)  
The Caren and Tom Kilgore Charitable Trust (2016)  
Kindling Fund (2012)  
Bert King Fund (2016)  
John Thomas Kittredge and Charles R. Morehead Fund (2011)  
KJN Family Fund (1998)  
Kluchman Family Fund (1997)  
Allen and Elizabeth Kluchman Fund (1997)  
Klureza Family Fund (1997)  
**Knox Family Fund (2018)**  
Pamela Kohlberg Fund (1995)  
Stephen P. Koster Fund (1986)  
Ronni Sachs Kotler Family Fund (2007)

**Roger and Lisa Krakoff Foundation (2018)**

Kravitz Family Fund (1994)  
Krivickas Family Fund (2007)

**Paul and Mimi La Camera Charitable Fund (2018)**

Gregory and Deborah Laham Family Charitable Fund (2011)  
Lisa and William Lahey Fund (2017)  
Jay R. and Carol B. LaMarche Family Charitable Trust (2013)

**LandsEnd Charitable Fund (2018)**

LandWave Fund (2010)  
Lash Family Charitable Fund (2014)  
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2006)

**The J. & S. Lawrence Family Fund (2018)**

Leading By Example Fund (2015)  
Barbara Lee Family Foundation Fund (2004)  
Paul and Mary Lee Fund (2014)  
Roger & Clarissa Lee Family Fund (2010)  
Thomas E. & Barbara B. Leggat Fund (1987)  
Jo-Ann and Martin Leinwand Fund (1987)  
Colman & Carol Levin Fund II (2017)  
The Karen and Howard Levine Family Fund (2004)  
Levitt Family Fund (2001)  
Levy Family Fund (2015)  
Henry R. Lewis Family Fund (2008)  
Light-Curtin Fund (2017)  
John S. Llewellyn, Jr. Community Assistance Fund (1997)  
LMG Fund (1997)  
Marjorie L. and James M. Lober Fund (2010)  
LOC Fund (2009)  
Joan Locatelli Foley Memorial Fund D (1997)  
GC & JW Lodge Fund (2001)  
Longfield Family Foundation (2012)  
Loomis Sayles Charitable Fund (2008)  
Lord-Buck Fund (1996)

Bruce Lunder Fund (1983)  
John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)  
Donald J. & S. Kelley MacDonald Charitable Fund (1999)  
Magic Penny Fund (1998)  
Mahoney Family Fund (1984)  
Mann Family Fund (2011)  
Margolin/Rushford Charitable Fund (2015)  
William G. Markos Fund (1983)  
Evelyn A. Marran Fund (1984)  
Martin Fund (1998)  
Mason-Brown Fund (2008)  
Match School Scholarship Fund (2008)  
Joan S. Mathews Charitable Fund (2015)  
Eric and Sue May Charitable Fund (2012)  
May-McClain Charitable Gift Fund (2012)  
Mayel Fund (1982)  
Austin and Tiverton McClintock Gift Fund (2014)  
Alice L. McDougall Donor Advised Fund (2015)  
Richard & Judith McGinnis Fund (2000)  
Eleanor P. McIntyre Fund (2001)  
McNeill Family Foundation (1998)  
McSweeney Family Charitable Fund (2010)  
Medical Research Fund (1993)  
Emily & Bernard H. Mehlman Fund (2003)  
**Melendez & Beauchamp Family Fund (2018)**  
Mellowes Fund (1998)  
Thomas M. Menino Fund for Boston (2014)  
Gilbert G. Menna Family Fund (1999)  
Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1999)  
Meyer Foundation (2007)  
Allan Meyers Fund for the Advancement of Careers in Disability (2001)  
Michon Family Fund (1987)  
Microsoft Unlimited Potential Fund (2005)

Mid-Century Fund (2005)  
J. F. Middleton Family Fund (1996)  
Milford Street Fund (2015)  
Mill River Foundation Fund (2004)  
Gabrielle J. Miller Donor Advised Fund (2005)  
The Mills Family Charitable Fund (2017)  
**Mimecast Charitable Fund (2018)**  
Anita L. Mishler Education Fund (1984)  
Moccasin Brook Fund (2000)  
The Modi Family Pass The Luck Foundation (2012)  
Molino Family Fund (2004)  
Monadnock Fund (2002)  
Mormann Family Fund (2007)  
Andy Morris and Lynne Salkin Morris Family Fund (2012)  
Robert S. Morris Advised Fund (2001)  
Sykes Moyer Fund (2005)  
Muddy Pond Trust Fund (1994)  
Munger Family Fund (2002)  
Bob & Alison Murchison Fund (2014)  
Murchison/Silvia Charitable Gift Fund (2010)  
Murphy Family Fund (2014)  
The Murray Family Fund (2017)  
**Musicus (2018)**  
Mussafer Family Fund (2014)  
Myrtle Field Fund (2005)  
Mystic Harmony Fund (2001)  
Mystic River Watershed Environmental Fund (2012)  
Paul and Kathleen Nagle Family Fund (2007)  
Leslie & Sandra Nanberg Charitable Foundation Fund (2002)  
Tami E. Nason Fund (2005)  
NE500/501Circle (2016)  
**NEID Climate Change Giving Circle Fund (2018)**  
NEID Giving Circle (2017)

New Beginnings/Kidder Fund (2005)  
 New England Temperature Solutions (2014)  
**New Place (2018)**  
 Next Door Fund (2006)  
 Nichols Foundation (2017)  
 Nichols Foundation West (2017)  
 Joan Nichols Family Fund (2017)  
 The Nichols Philanthropy Fund (2017)  
 William H. Nichols Fund (2017)  
**Nixin Foundation (2018)**  
 North Conway Institute Fund (2001)  
 Chad & Lia Novotny Fund (2002)  
 Kathryn Novotny Fund (2007)  
 Nicholas Novotny Fund (2007)  
 Novotny/Ramirez Donor Advised Fund (2002)  
 Novotny/Swahnberg Fund (1998)  
 O'Brien Family Fund (2007)  
 Vania and Barbara O'Connor Charitable Fund (2014)  
 One Foot Plan (2015)  
 Orchard Hill Fund (2013)  
 Orpheus Fund (2003)  
 E. Ostroff Fund for Service (2017)  
 Owen Marie Fund (2013)  
 Palmer Family Fund (2016)  
 Morgan Palmer Foundation (1982)  
 John J. Pappenheimer Fund (1995)  
 The Park Family Charitable Fund (2014)  
 Parker Family Fund (2001)  
 Field Parker Fund (1997)  
 Partnership Fund in honor of Anna Faith Jones (2001)  
 Alfred Nash Patterson Foundation for the Choral Arts Fund (1980)  
 Payne's Creek Fund (2002)  
 Payson Family Fund (2001)  
 Perkins Improvements Fund - William (1996)  
 John A. Perkins, Jr. Fund (2001)

Robert C. Perkins Fund (2001)  
 Samuel Perkins and Nancy Reed Fund (1996)  
 Sheila and Sara Perkins Fund (1996)  
 Peter Fund (2001)  
 Petersen Family Fund (2002)  
 Philancon Fund (1990)  
 Katherine A. & Fannie Phillips Fund (1997)  
 Picard Family Fund (2000)  
 Jamie Pierce & Rick Cresswell Fund (2003)  
 Karen Odessa Piper Charitable Gift Fund (2014)  
 Plimpton - Shattuck Fund (2006)  
 Pluhar Family Fund (2014)  
 Renata Poggioli Fund (1992)  
 The Poler Family Foundation (2009)  
 Pool Family Fund (1998)  
 Poss-Kapor Family Fund (1996)  
 Helen C. Powell Donor Advised Fund (2015)  
 Pride in Scholarship Fund (1993)  
 Primary Care Progress Fund (2012)  
 Thomas & Mary Prince Family Fund (2001)  
 Joseph G. Prone Foundation (2014)  
 Sue and Bernie Pucker Fund (2003)  
 Donald and Frances Putnoi Charitable Fund (2007)  
 Peg Pyne Fund for Handicapped Access (1986)  
 Quid Nunc Fund (2002)  
 Sidney R. & Esther V. Rabb Family Fund (1984)  
 Barbara & Yale Rabin Fund (2002)  
 Radtke Family Fund (1997)  
 Otto W. Ramstad Fund (1999)  
 Phyllis and Jerome Lyle Rappaport Fund (2016)  
 Bessye Bedrick Ravelson Fund (2003)  
 Gene Record Fund (2002)  
 Sara Delano Redmond Fund (1996)  
 Remmer-Fox Family Fund (1996)  
 Reno Family Charitable Foundation (1999)  
 Edward S. Reynolds Memorial Fund (1985)

Rhyme and Reason Fund (2001)  
 Roberts Family Fund (1996)  
 Roberts-Belove Fund (2005)  
 Robynhood Thanksgiving Fund (2003)  
 Roscoe Trimmier Fund (2016)  
 Rosedune Fund (1971)  
 Rosen Family Fund (2008)  
 Lindsey A. Rosen Fund (2011)  
**Rossiter Family Fund (2018)**  
 Daniel and Brooke Roth Charitable Gift Fund (2008)  
 Rothman Charitable Fund (2014)  
 Rotman-Attardo Family Fund (2006)  
 Rust Bowl Fund (1988)  
 Saffron Circle Fund (2006)  
 David Salten Fund (2008)  
 Samuelson Family Gift Fund (2013)  
 Risha C. and Paul A. Samuelson Fund (1982)  
 Sands Family Fund (2012)  
 Susan F. Schaeffer Fund (2014)  
 Schawbel Family Fund (1995)  
 Margaret M. Schmidt and Kenneth J. Danila Fund (2005)  
 Schott Fund (1999)  
 Schumann Family Fund (2005)  
 Joel Schwartz Family Fund (2001)  
 Schwinn Family Charitable Foundation (2011)  
 Charles S. and Zena A. Scimeca Charitable Fund (2004)  
 September Fund (2001)  
 A Servant's Heart (2014)  
 Norman and Maryellen Sullivan Shachoy Fund (1998)  
 Shames/Egasti Fund (1992)  
 Shapiro/Fleishman Fund (2000)  
 Douglas Boyd Sharpe Donor Advised Fund (2007)  
 Shawkemo Fund (2001)

SheGives Fund (2015)  
 Bob and Jean Sheridan Family Fund (2013)  
 Sherman Family Foundation Fund (2005)  
 Jon Shevell Cancer Fund (2011)  
 Jon Shevell Children's Fund (2011)  
 Jon Shevell Education Fund (2011)  
 William U. & J.W. Shipley Fund (2002)  
 Shoe Box Foundation Fund (2004)  
 Peter Sidewater Foundation (2017)  
 Jean Karpas Siegel Fund (1995)  
 Silvia-Chandley Fund (2014)  
 John and Susan Simon Boston Foundation Fund (2007)  
 Ellen L. Simons Fund (1998)  
 Sixty-Nine Roses Charitable Foundation (2011)  
 Skylight Fund (2000)  
 Fay Slover Fund (2011)  
 Ellin Smalley Fund (1988)  
 Austin & Susan Smith Fund (2000)  
 Clark R. and Trina H. Smith Family Fund (1991)  
 J. Alper Smith Fund (1997)  
**Anna and Jack Sommers Family Gift Fund (2018)**  
 Nancy and George Soule Family Fund (1998)  
 Sparky Foundation Fund (2004)  
 Spector Fund (2002)  
 Spencer Family Charitable Fund (2015)  
 David F. Squire Family Fund (1998)  
 State Street Fund (2013)  
 Harvey & Shirley Stein Fund (2000)  
 Stewart Fund (2006)  
 Tracy Stewart Fund (2009)  
 Stith Hope Fund (2015)  
 Elihu and Lillian Stone Family Charitable Fund (2003)  
 James M. and Cathleen D. Stone Foundation (1996)  
 Congressman Gerry E. Studds Fund (2007)  
 Charles Sugnet Fund (1999)  
 Joshua Sugnet Fund (1999)  
 Suhrbier Family Fund (2006)  
 Nancy L. Sullivan Fund (1990)  
 Diane Sullivan-Villano Fund (1998)  
 Sunrise Fund (1993)  
 Swift Harvey Family Fund (2015)  
 Sylvan Fund (1986)  
 TechFoundation Fund (2003)  
 Tempero Family Fund (2003)  
 Marc Thompson & Maureen Conway Family Fund (2008)  
 Thomsen Family Fund (2001)  
 Susan and Michael Thonis Fund (2005)  
 TK Foundation (2015)  
 Scott and Jennifer Tobin Charitable Fund (2005)  
 Toms Family Fund (2016)  
 Topol Family Fund (1991)  
 Trefler Fund (1997)  
 Elizabeth Trichel Joyce Family Fund (2007)  
**Tusk Montgomery Charitable Giving Fund (2018)**  
 The Tuukka Rask Foundation (2014)  
 Tye Charitable Fund (2007)  
 Joseph Bishop Van Sciver Fund (1861-1943) (1998)  
 Nancy J. Vickers Fund (2007)  
 Marlyn and Richard Victor Fund (2017)  
 Violet Iris Fund (2015)  
 Ann & Robert von der Lippe Fund (1998)  
 James and Margaret Wade Fund (1997)  
 JH & EV Wade Fund (1991)  
 Linda M. Walczak Children's Literacy Fund (2016)  
**Waldron Charitable Fund (2018)**  
 Walker Fund (1999)  
 The Walter/Capone Fund (2011)  
 Ruth and Henry Walter Fund I, II, & III (2011)  
 J. H. Walton Family Fund (1987)  
 Mitchell and Barbara Freedman Wand Charitable Fund (2014)  
 Warner Charitable Gift Fund (2000)  
 Anita Barker Weeks Charitable Gift Fund (2012)  
 Gordon Weil, Jr. Fund (2010)  
 Weiss Charitable Fund (2005)  
 Wellesley Hills Congregational Church Outreach Fund (2007)  
 Janet White Memorial Scholarship Fund (2004)  
 Whitehead - Sayare Fund (2008)  
 Guy and Maggie Wickwire Fund (1990)  
 James and Debra Wiess Fund (2013)  
 Benjamin J. Williams, Jr. Fund (1987)  
 Hope A. Williams Fund (1987)  
 Natica R. Williams Fund (1987)  
 Ralph B. & Margaret C. Williams Fund (1985)  
 Ralph B. Williams, II Fund (1987)  
 Williamson Charitable Fund (2016)  
 The Windy West Fund (2016)  
 Winkler Family Foundation Fund (2001)  
 Winn Family Charitable Fund (2016)  
 Wesley L. Winship Fund (1999)  
 Winsor Foundation Fund (1989)  
 Jack & Judith Wittenberg Fund (1997)  
 Howard L. Wolf Memorial Fund (1981)  
 Michael N. Wood Fund (1997)  
**Christopher and Debra Wysopal Charitable Trust (2018)**  
 Leila Yassa & David Mendels Fund (2001)  
**YotMe Donor Advised Fund (2018)**  
 Zabin Charitable Fund (2001)  
 Emily Zofnass Fund (1998)  
 T. Zouikin Charitable Fund (2004)  
 Zug Family Fund (2009)  
 Zwanziger Fund (2007)  
**The Zwanziger-Hoffman Fund (2018)**

## SUPPORT ORGANIZATIONS

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

## SCHOLARSHIP FUNDS

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

The Laura Ahlbeck Memorial Scholarship Fund (2017)  
Harry Ankeles Scholarship Fund (1993)  
Benjamin Foundation Scholarship Program (2017)  
Blair Family AvalonBay College Scholarship (2013)  
George C. Brackett STEM Scholarship (2016)  
Francis J. Bresnahan Educational Scholarship Fund (1987)  
Alex Castoldi Memorial Scholarship Fund (1982)

**The Cicolani Family Scholarship Fund (2018)**

Paula Marie Danforth Memorial Scholarship Fund (1990)  
deVille Fund (1995)  
Eagle Bank-Frank E. Woodward Scholarship Fund (1986)  
Albert Francis Gilmartin Memorial Scholarship Fund (2005)  
Americo J. Francisco Scholarship Fund (1994)  
**Gladwood Scholarships (2018)**  
Robert L. Gould Fund (1988)  
Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)  
Janey Fund Scholarship Program (1999)  
Manton Scholars (2017)  
Nixon Peabody Scholarship Program in Recognition of Retired Managing Partners Robert S. Cummings, Nestor M. Nicholas and Harry P. Trueheart, III (1998)  
Stephen D. Paine Scholarship Fund (1999)  
**Prilla Smith Brackett Award (2018)**  
Francis P. Sears Scholarship Fund (1974)  
Paul & Eleanor Young Fund (1989)  
Youth Business Institute Scholarship (2014)

## DESIGNATED FUNDS

**Designated Funds have been established to support specific, named organizations. Through these funds, many nonprofit institutions receive crucial annual support. The year the fund was established is listed in parentheses and new funds are bolded.**

1819 Greek Revival Renewal Fund (2012)  
ACCESS Education Fund (1985)  
Fund for Adult Literacy (1985)  
Rae and Aaron Alberts Foundation Fund (2003)  
Rae and Aaron Alberts Foundation Fund II (2005)

### **Ames, IA Public Library Large Print Endowment Fund (2018)**

Frank E. Anderson Fund (1976)  
Artists Foundation Endowment Fund (1984)  
Red Auerbach Youth Foundation Fund (1983)  
The Helena and Alfred Barthel "Peace on Earth" Endowment (2017)  
Lilian G. Bates Fund (1952)

### **Bedford, MA Public Library Large Print Endowment Fund (2018)**

Grace & Floyd Lee Bell Fund (1988)  
BLS Alumni of Color Scholarship Fund (2016)

### **Lisa and Tom Blumenthal Artistic Innovation Fund (2018)**

Boston Ballet - E. Virginia Williams Endowment Fund (1984)  
Boston Bar Association Endowment Fund (1984)  
Boston Baroque Fund (2004)

### **Boston Debate League Endowment Fund (2018)**

### **Boston Medical Center Services Fund (2018)**

Boston Schoolyard Funders Collaborative (1996)

### **Boston University School of Education Fund (2018)**

Richard L. Bowser Fund (1985)  
BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)  
BPE/Support for Early Educational Development Fund (1986)  
Herbert Brandshaft Scholarship Fund (2008)  
Annie L. Breckenridge Trust Fund (2000)  
Brookline Youth Concerts Fund (1995)  
Michael and Stella Buonsanto Charitable Fund (2013)  
Charles T. Burke Fund for the Watertown Boys and Girls Club (1995)  
Charles T. Burke Fund for the Watertown Free Public Library (1995)  
Agnes T. Carruth Fund (1984)  
James F. Casey Fund (1950)  
Dr. Walter Channing Memorial Fund (1934)  
Charles River Parklands Stewardship Fund (2002)  
Philip P. Chase Fund (1956)  
Julia Child Fund (1980)  
Ellen D. Cholerton Fund (1970)  
**Arthur G. Chute and Nordice Chute Family Legacy (2018)**  
Ernest & Vera Clivio Charitable Memorial Fund (1982)  
Committee to Light Commonwealth Avenue Fund (2012)  
**Concord, MA Public Library Large Print Endowment Fund (2018)**  
Almon B. Cook - Relief Fund (2001)  
Allyn Cox Fund for Essex County Greenbelt (1994)  
Thomas G. Curtin - Bobby Kargula Nanae Fund (2010)

The Tarrant Cutler Family Science & Animal Fund (2015)

Dedham Choral Society Endowment Fund (1992)

Harry Ellis Dickson Youth Concerts Fund (1982)

Joy & George Dryfoos Charitable Fund (2013)

Duggan Charity Fund (1999)

East Boston Social Centers, Inc. Fund (1997)

Douglas A. Eaton Memorial Fund (1963)

William V. Ellis Fund for Our Lady of Good Voyage Carillon (2012)

Ruby C. Emerson Fund (1967)

English High School Class of 1934 Award Fund (1995)

The English High School - John P. Murphy Scholarship Fund (1996)

Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2009)

Philip M. Fagan Family Fund (1972)

Paul R. & Jacqueline D. Fehrenbach Family Fund (2000)

Benjamin M. Feinberg Fund (1963)

Arthur Fiedler Esplanade Concerts Fund (1980)

Mark Hayden Fineman Chess Tournament Fund (1985)

Food and Fuel Fund (2009)

Felix Fox Memorial Fund (1975)

Americo Francisco Fund, Estate & Realty/Charitable Trusts (1999)

Peter Marshall French Memorial Fund (1977)

Gaywest Farm Fund (1994)

**Tokyo Joshi Gakuen Junior and Senior High School Fund (2018)**

Agnes A. Gidley Memorial Fund (2014)

John & Ethel Goldberg Fund I (1984)

John & Ethel Goldberg Fund IV (1985)

John & Ethel Goldberg Fund V (1985)

John & Ethel Goldberg Fund VI (1985)

Bessie P. Goldsmith Fund (1994)

Barbara W. & Frank B. Gopen Fund (1979)

Walter W. Gove Fund (1973)

Elizabeth Grant Fund (1981)

Greatrex Scholarship Fund (1989)

Rosario Fajardo Hagan Fund (1991)

Haiti Development Institute (2016)

Patricia Jellinek Hallowell Fund (1993)

Hastings-Plummer Fund (1941)

Jorge N. Hernandez Fund (1988)

Gertrude Hooper Fund (1997)

Madeleine C. Huiginn Fund (1993)

Blanche Hyslop Fund (1983)

Orchestra of Indian Hill Music Director Fund (2003)

James W. & Margaret A. Ingraham Charitable Fund (1992)

**Inversant Fund (2018)**

Ella Jackson Artists and Scholars Fund (1983)

Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2014)

Donaldson F. Jones Fund (2000)

Patrick F. Jones, Jr. Endowment Fund (1982)

William & Sean Kelley Scholarship Fund (2010)

John F. Kennedy Library Foundation Endowment Fund (1984)

Demetra Kenneth-Brown Fund (1921)

Alice V. Kidder Fund (2001)

Robert D. and Sally G. King Fund (2000)

Kit Clark Senior Services Fund (2000)

**La Vida (2018)**

Gerald V. Levreault & Claire H. Levreault Fund (2002)

Lawrence B. Lewis Fund (1958)

**Lexington Arts & Crafts Endowment Fund (2018)**

**Lexington, MA Public Library Large Print Endowment Fund (2018)**

**Lincoln, MA Public Library Large Print Endowment Fund (2018)**

**Lionheart Foundation Endowment Fund (2018)**

Ralph Lowell Fund (1983)

Martin's Park Maintenance Fund (2017)

Gertrude F. & Henry L. Maurer Fund (1999)

John S. McCann Fund (2000)

MHEAC Fund for ACCESS (1987)

Dorothy Morse Endowment Fund (2000)

Harry D. Neary Fund (1951)

Neighborhood Preservation Initiative Fund (1995)

New England Aquarium Education Fund (1984)

New England Forestry Foundation Fund (1997)

New England Women's Club Fund (2002)

Next Steps Fund (2017)

Roger L. Nichols Internship Program Fund (1985)

William H. Nichols Fund For Chemistry (2017)

**Noonan Scholars Endowment Fund (2018)**

Lottie S. Page Fund (1985)

Robert Treat Paine Historical Trust Fund (1991)

Palazzo San Gervasio Library Fund (1995)

William Morgan Palmer Fund (1978)

Harold Peabody Memorial Fund (1993)

Permanent Fund for Vocational Education (1979)

John M. Pero Scholarship Fund (2015)

Charles & Cornelia Pfaff Fund (1965)

Henry L. Pierce Fund (1959)

Emma K. & Richard Pigeon Fund (1956)  
The Plimpton-Poorvu Design Prize Fund (2015)  
Pozen Prize for Innovative Schools (2014)  
Primary Care Fellowship Program Fund (1983)  
Public School Management Research Fund (2003)

Charlotte F. & Irving W. Rabb Family Fund (1985)  
Reading Visiting Nurse Association Fund (1977)

**Rockport Music Fund (2018)**

Rogers Fund of the Riverside Cemetery (1998)  
Henry A. Root Fund (1927)  
Rose Fund (1982)  
Fund for Rosie's Place (1984)

**Roxbury Community College (2018)**

Dr. Jordan S. Ruboy Charitable Fund (2014)  
Sheep Pasture Fund (1994)  
Bessie H. Short Fund (1997)  
Dana P. & Maude E. Simpson Memorial Fund (1999)  
Muriel & Otto Snowden Endowment Fund (1985)

Social Law Library Endowment Fund (1982)  
SparkShare Fund (2017)  
Michael Spock Community Service Fund (1981)  
Alison L. Stevens Fund (1977)  
Eva and William Stillman Scholarship Fund (2014)

Miriam & Sidney Stoneman Fund (1984)  
Surfmen's Trust Fund (1978)  
Agnes & Lewis Taylor Fund (1963)  
Frank B. Thayer Fund (1977)  
Pauline Toumpouras Fund (2010)

**Tsuda College Fund (2018)**

David J. Tuttle, Jr. ALS Fund (2016)

David J. Tuttle, Jr. MIT Fund (2016)  
United Way Millennium Fund for Children and Families (2000)  
Ansin Fund (2003)  
Chelsea Boys and Girls Club Fund (2001)  
Connell Family Fund (2001)  
Carol R. & Avram J. Goldberg Fund (2002)  
Lawrence & Beth Greenberg Fund (2001)  
Darlene & Jerry Jordan Fund for Children (2000)  
Margarete McNeice Fund (2001)  
David R. and Muriel K. Pokross Fund (2004)  
Schoen Family Fund (2000)  
Tom & Nancy Shepherd Fund (2001)  
State Street Foundation Fund (2001)  
J.C. Tempel Fund for Children (2001)  
Vinik Family Fund (2001)  
Peter and Pamela Voss Fund (2001)

Robert E. Wallace Memorial Fund of the Urban League (1992)  
Inez Washabaugh Ward, PNP, Scholarship Fund (2011)  
Bradford Washburn Fund (1980)  
Bill and Estelle Watters Fund (1997)  
Jane Wengren Fund (1980)  
Stetson Whitcher Fund (1987)  
Wiener Fund (2009)  
May J. Wikstrom Fund (1999)  
Rudolph & Sara Wyner Prize Fund (1986)

**Julia Child Fund**



The Julia Child Fund at the Boston Foundation was created by Ms. Child, the iconic author of *Mastering the Art of French Cooking* and star of the WGBH-TV series *The French Chef*, which first aired in 1963. In order to inspire and help aspiring chefs, this Fund at the Boston Foundation funds a series of fellowships at Culinary Trust to support professional study, research, writing and teaching related to food, wine and the culinary arts.

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By working with the Boston Foundation, you become an important part of a dynamic community of problem solvers. Through research, forums and policy leadership, the Boston Foundation has helped to leverage hundreds of millions of dollars in federal and state funds, restructure our community college system, provide crucial state funds for cultural facilities and inform groundbreaking criminal justice legislation. This work is supported by the annual campaign for the Civic Leadership Fund, to which over 400 generous donors contributed last year.

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## HELPING COMPANIES GIVE LOCALLY, NATIONALLY AND INTERNATIONALLY

Partnering with the Boston Foundation on your company's giving is an easy and dynamic way to maximize your impact on the communities you serve. We can customize a suite of services to assist with launching or growing your company's giving program—in Greater Boston, nationally or internationally. Opening a Company Advised Fund at the Boston Foundation is a great alternative to establishing a corporate foundation—with all of the tax benefits and none of the administrative, legal, tax or regulatory burdens. The Foundation also encourages entrepreneurs to join Pledge 1% Boston to weave philanthropy into the fabric of their companies from the very beginning.

## MAXIMIZING YOUR GIVING WITH THE PHILANTHROPIC INITIATIVE

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

## GETTING STARTED

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

**For more information about becoming a donor or making a planned or legacy gift to the Boston Foundation, call or email the Philanthropy Group at 617-338-2213 or [donorservices@tbf.org](mailto:donorservices@tbf.org).**



# APPLYING for a Grant

## FUNDING OPPORTUNITIES

Each year, the Boston Foundation distributes more than \$15 million in grants and other support from our endowment, the Permanent Fund for Boston, which has been built over the years through outright gifts and bequests from hundreds of generous Boston area donors who care deeply about our community.

Since 2009, the Boston Foundation has invested the majority of the resources from that fund to “move the needle” in a set of five impact areas and two crosscutting strategies. We also distribute a portion of our resources through Open Door Grants, designed to respond to the expressed opportunities and needs of the communities we serve. And a number of grants and strategic investments are made to special issue-focused initiatives.

## FIVE IMPACT AREAS

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

**Education to Career**

**Health & Wellness**

**Jobs & Economic Development**

**Neighborhoods & Housing**

**Arts & Culture**



## CROSSCUTTING STRATEGIES

The Boston Foundation also pursues two crosscutting strategies:

The **Nonprofit Effectiveness** strategy supports and promotes effective, inclusive and sustainable nonprofits in Greater Boston by focusing on three core competencies: support, develop and recognize the sector's leadership and build a diverse and inclusive nonprofit sector leadership pipeline; strengthen organizational capacity by bolstering the operational effectiveness of individual nonprofits and advancing the sector's capacity for collective action; share resources with the sector by facilitating strategic, data-driven philanthropy via the Giving Common ([www.givingcommon.org](http://www.givingcommon.org)), an open online database that connects robust information about more than 1,100 Massachusetts nonprofit organizations with donors, funders and other stakeholders.

The **Grassroots** strategy is set up to respond quickly to community needs, with grants from the Grassroots Fund that range from \$200 to \$10,000 going to grassroots organizations anchored in Boston's neighborhoods. These grants help people come together, establish relationships, strengthen political will, form caring connections, heal divides and build clout and resilience.

## OPEN DOOR GRANTS

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

**Visit [www.tbf.org/grants](http://www.tbf.org/grants) for more information about all of these Funding Opportunities and detailed guidelines that will help organizations apply for a grant.**



# 2018 FINANCIALS

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

## FUND FOR THE 21ST CENTURY

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

## FINANCIAL OVERSIGHT

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

### INVESTMENT PERFORMANCE: as of June 30, 2018

	1 YEAR	3 YEARS	5 YEARS	10 YEARS	15 YEARS
<i>Fund for 21st Century Investment Options:</i>					
Balanced Plus Pool	8.9%	6.5%	7.4%	5.1%	7.3%
Balanced Pool (established 2/1/11)	6.9%	5.2%	5.9%	n/a	n/a
Short-Term Pool (established 1/1/10)	1.3%	0.7%	0.4%	n/a	n/a
<i>Benchmarks:</i>					
65% MSCI A.C. World/35% FTSE World Bond Index	7.6%	6.4%	6.6%	4.8%	6.8%
MSCI All Country World Stock Index	10.7%	8.2%	9.4%	5.8%	8.2%
S & P 500 Stock Index	14.4%	11.9%	13.4%	10.2%	9.3%
FTSE World Bond Index	1.9%	2.8%	1.1%	2.1%	3.5%

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

## THE SPENDING POLICY

By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2018 spending rate was 6% for its permanently restricted discretionary funds. For Fiscal Year 2019, the Board approved a spending rate of 5.75% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the 5.75% spending rate applied to the current market value. The approved spending policy rate for designated endowment funds is 5% for Fiscal Year 2019.

## THE PHILANTHROPIC INITIATIVE

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2018, the operations of TPI added \$2.5 million of service fee income to the operations of the Foundation.

## FINANCIAL ANALYSIS

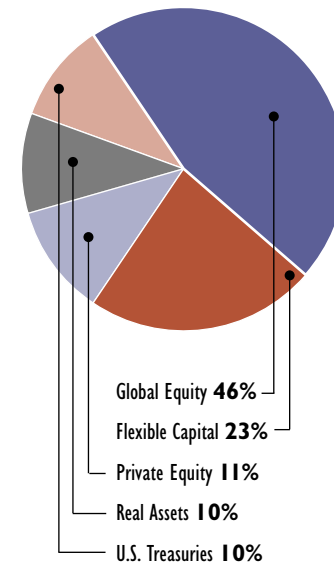
Total assets of the Boston Foundation increased from \$1.1 billion to \$1.3 billion at June 30, 2018. For the year, net investment returns for the Balanced Plus Pool were 8.9%. During this same period, the Foundation received \$203 million in contributions and paid \$129 million in grants. Expenditures for program support and operating expenses totaled \$22.5 million, thus explaining the change in total assets.

## FINANCIAL STATEMENTS

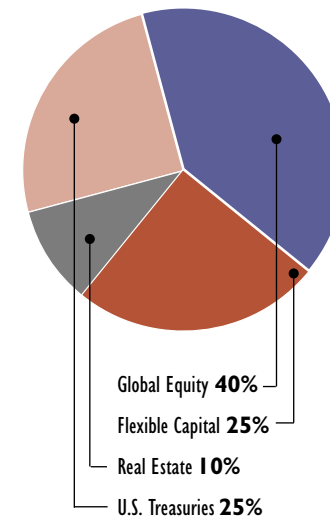
The Foundation's financial statements are prepared in accordance with policies and procedures overseen by the Foundation's independent Audit Committee and the Board of Directors. A summary of the financial statements is shown on the following page. The statements and Form 990 are available on our website at [www.tbf.org](http://www.tbf.org).

### ASSET ALLOCATION

#### Balanced Plus Pool



#### Balanced Pool



# 2017 AND 2018 SUMMARY FINANCIAL STATEMENTS

(in thousands)

<b>ASSETS:</b>	<b>2018</b>	<b>2017</b>
Investments	\$ 1,209,800	\$ 1,072,982
Cash Equivalents	6,088	5,499
U.S. Treasury Notes	25,157	20,891
Receivables & Other	16,612	15,914
Total Assets	\$ 1,257,657	\$ 1,115,286

<b>LIABILITIES &amp; NET ASSETS:</b>		
Accounts Payable and Other Liabilities	\$ 7,817	\$ 7,210
Grants Payable	2,091	2,167
Net Assets	1,247,749	1,105,909
Total Liabilities & Net Assets	\$ 1,257,657	\$ 1,115,286

<b>REVENUES:</b>		
Contributions	\$ 202,734	\$ 193,765
Service Fee Income	2,250	2,048
Net Investment Return	89,311	108,541
Total Revenues	294,295	304,354

<b>GRANTS &amp; EXPENSES:</b>		
Grants	130,105	137,247
Change in Split Interest Trusts	(154)	(134)
Program Support	5,980	5,895
Operating Expenses	16,524	16,079
Total Grants & Expenses	152,455	159,087
Change in Net Assets	141,840	145,267
Net Assets Beginning of Year	1,105,909	960,642
Net Assets End of Year	\$ 1,247,749	\$ 1,105,909

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

# BOARD of Directors

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



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