



Philanthropic Advisor

*A Guide to Charitable Giving
for Professional Advisors*

The Boston Foundation 



Philanthropy in Practice

Alan and Harriet Lewis

World Travelers Use Philanthropy to Help Change the World

In 1985, Alan and Harriet Lewis bought Grand Circle Travel. Alan, a self-made entrepreneur who grew up in some of Boston's rougher neighborhoods, and Harriet, a special-education teacher, built the company into one of the largest and most successful tour operators in the world.

The tremendous success of Grand Circle has given them the resources to become major philanthropists. Their Grand Circle Foundation has pledged or donated more than \$90 million worldwide to support educational programs in the 25 countries that have graciously welcomed them and their clients for many years. They also have a private foundation and a Donor Advised Fund at the Boston Foundation, through which they make numerous grants to nonprofits in the Boston area.

"Our philanthropy is all about education," says Harriet, "whether it's in Argentina, Nepal or Boston. More than anything else, education—especially a college degree—has the capacity to transform lives, to offer opportunity, give young people a way up and a way out of poverty, even change entire neighborhoods."

While they make grants to numerous programs in the Boston area and around the world, Alan and Harriet do not want to be thought of as 'givers.' "Everything we do is in partnership with people and communities," explains Harriet. In a Costa Rican village, for instance, before deciding what to support, they met with the families to ask them what they needed to improve the education of their children. They also asked the families how they could participate and help. Everyone voiced the need for computers, but the school wasn't set up for computers, so

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one father said he would provide the electrical work and another said he would put windows in the school to protect the new equipment. “That is true partnership,” says Harriet.

Alan and Harriet seek out leaders who have a profound integrity and passion about their work, which is what attracted them to Robert Lewis, Jr., the Boston Foundation’s former Vice President for Program, who introduced them to the Foundation’s StreetSafe Boston initiative, which they have supported since its earliest days through major grants from their Donor Advised Fund. They traveled with Robert—not to a foreign country, but to many of the same inner-city streets Alan knew as a child. While StreetSafe’s primary mission is to reduce youth violence, it does so by connecting high-risk youth with opportunities that provide them with “a way up and a way out,” including education.

A Different Kind of Education

For years Harriet had been providing scholarship opportunities for students from Roxbury, Dorchester and Allston who were academically outstanding, but she yearned to offer them a different kind of education—the sorts of experiences that have shaped her life. And so she created Next Generation Leaders, which offers college-bound students internships at Grand Circle Travel, where they spend time learning business practices, and then takes them to Tanzania, where the young leaders volunteer in schools for Masai children and experience what life is like for those who have even fewer advantages in life than they do. Harriet was moved when one of the participants, who was homeless in Boston, marveled ‘I take so much for granted.’ “Here was a girl who had nothing but her own strength and resilience,” Harriet reflects, “discovering that there are others with even less.”

Alan and Harriet are focusing much of their local philanthropy on ensuring that more and more Boston graduates attend—and graduate from—college, which is also a major strategic focus for the Boston Foundation. In a spirit of partnership, they have created a Community Advisory Group, which includes many nonprofits that work with young adults, such as Year Up, uAspire, Artists for Humanity, Freedom House and Bottom Line, the latter being a major partner in their CollegeWorks program that promotes college completion for Boston’s graduates.

Over the years, their grantmaking has evolved and has focused on identifying what really works. They have learned from any mistakes they have made along the way. And when it comes to their giving in Greater Boston, some of it focuses on Boston neighborhoods similar to those Alan knew as a child, especially the “spine” that runs through Boston’s low-income neighborhoods of Roxbury, Dorchester and Mattapan. They agree about their ultimate goal: “We would like to see a community that is healthier in every possible way, with nonprofit leaders and community leaders working together with neighbors and young people and businesses and parents. Strength through partnership. That’s our vision.” 

About the Boston Foundation

The Boston Foundation, Greater Boston’s community foundation, is one of the nation’s oldest and largest community foundations, with net assets of close to \$900 million under management. It offers charitable giving vehicles known as Donor Advised Funds for those who have \$10,000 or more to invest. Gifts to a Donor Advised Fund are generally tax deductible (50 percent of adjusted gross income for cash and 30 percent of AGI for stocks and real property) and no yearly distribution is required. There is a small fee for administration and management.

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