

This Is How We Build Boston's Future

*One Opportunity
at a Time*

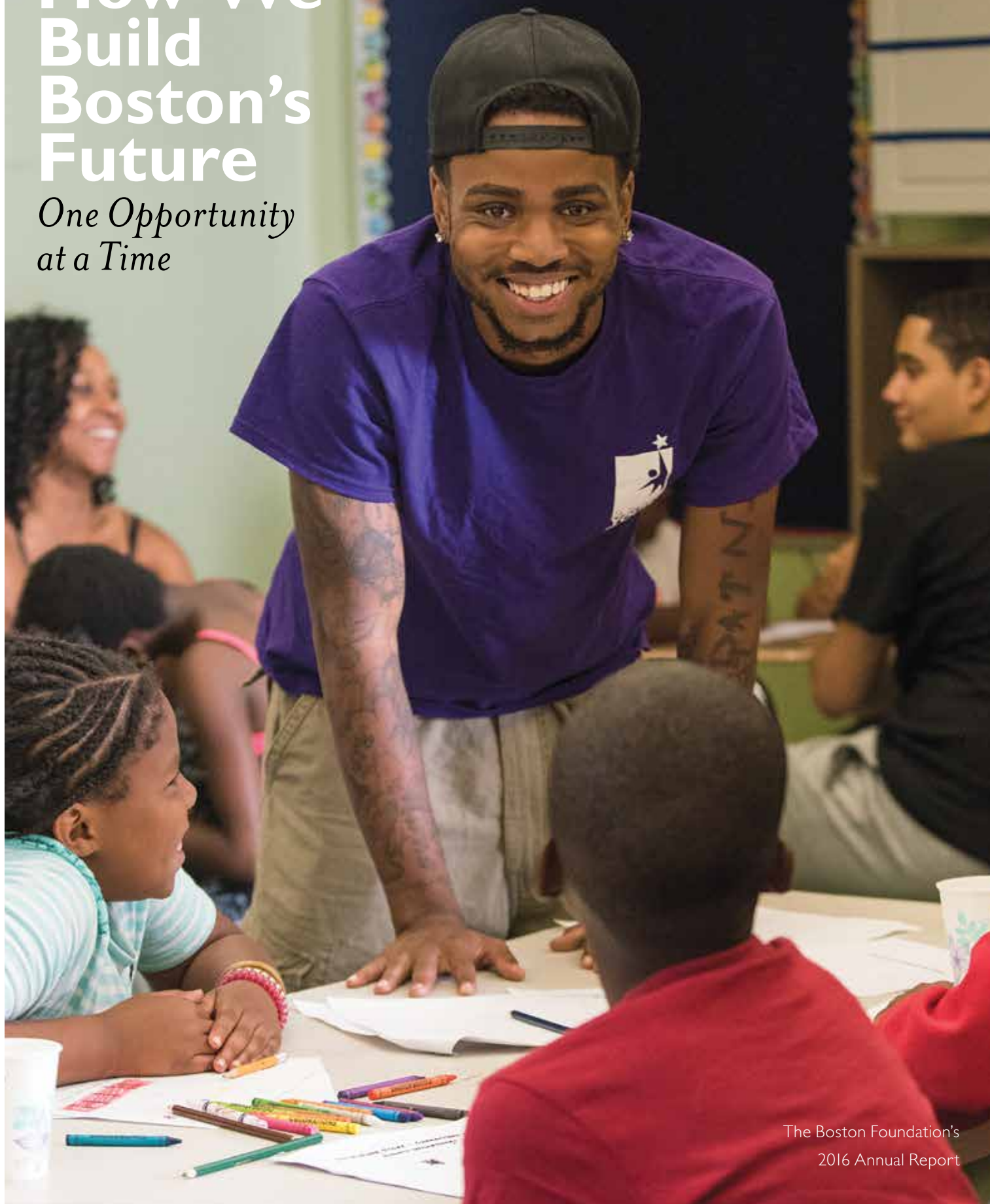


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About the Boston Foundation

The Boston Foundation, Greater Boston's community foundation, is one of the largest community foundations in the nation, with net assets of some \$1 billion. In 2016, the Foundation and its donors paid \$100 million in grants to nonprofit organizations and received gifts of more than \$107 million. The Foundation is proud to be a partner in philanthropy, with more than 1,000 separate charitable funds established by donors either for the general benefit of the community or for special purposes. In celebration of its Centennial in 2015, the Boston Foundation launched the ongoing Campaign for Boston to strengthen the Permanent Fund for Boston, the only endowment fund focused on meeting the most pressing needs of Greater Boston.

The Boston Foundation also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), a distinct operating unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations around the globe.

Our Mission

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

- 1 MAKING GRANTS** to nonprofit organizations and designing special funding initiatives to address this community's critical challenges;
- 2 WORKING IN PARTNERSHIP** with donors to achieve high-impact philanthropy; and
- 3 SERVING AS A CIVIC HUB** and center of information, where ideas are shared, levers for change are identified and common agendas for the future are developed.

Our Values Statement

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

Introduction

We invite you to study the faces of the people we feature in this Annual Report and bear witness to Boston's future.

Some of them are beginning their adult lives by working at their very first job or becoming the first person in their family to attend college. Others are young entrepreneurs, seasoned artists and middle-aged workers who are training for jobs that will pull them out of poverty and provide a family-supporting income.

All of them are crucial to our city's success.

After celebrating our 100th Anniversary last year, we entered the first year of our next century with a tremendous sense of hope. We began by looking back at the work we had done over the last five years and publishing a detailed report on the areas where we successfully moved the needle and those where challenges remain.

We launched Vision 2020, a new strategic framework for the next five years. And we returned to our roots by announcing an Open Door Grants program for promising new ideas that need support to take them to the next level. The Foundation has a long history of investing in great ideas and new nonprofits. More than 100 of them have blossomed into some of our city's most innovative nonprofit organizations and greatest achievements.

We want to thank Michael Keating for his tremendous service to this organization as Chair of the Board of Directors for the last eight years. He guided the Foundation through a time of remarkable change and impact. In honor of his contributions, the Foundation has established a \$1 million Michael B. Keating Fund for Justice and Social Equity, a flexible fund within our endowment, the Permanent Fund for Boston. Now his name will always be associated with this organization that he served with such wisdom and vision.

This Annual Report is about the Boston Foundation's investments in the future.

We will continue to track our progress through the use of data, but we are also committed to telling the stories behind the numbers, as we do in this report.

If we succeed in meeting the ambitious goals we and our many partners have set for ourselves, Boston will truly become America's city of opportunity.



Sandra M. Edgerley

Chair, Board of Directors




Paul S. Grogan

President & CEO

This Is How We Build Boston's Future

One Opportunity at a Time



In this, the first year of the Boston Foundation's next century as Greater Boston's community foundation, our eyes are focused firmly on the future. Will we be able to extend the benefits of our flourishing innovation economy to more individuals and families? Will our young people find the support they need to prepare for the challenges ahead in school and work? Will Boston experience an arts renaissance through new leadership and vision? Finally, can we build a city that is a national model for breaking cycles of poverty and offering promising futures for its residents?

This annual report tells the stories of just some of the organizations and people we support who are working hard to open the doors of opportunity to everyone in our city. This is how we move forward in extraordinarily challenging times. This is how we build Boston's future.

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MassChallenge


Accelerating the Next Generation of Entrepreneurs

Katia Powell “grew up overweight” in Roxbury. “By the time I was 26, I weighed 350 pounds,” she says. “One day, everything was going wrong. I went to the corner store and bought honey buns, hot pockets and a cheesecake. When I got home, I caught my reflection in the mirror, and that’s when I realized there was a diva trapped inside my body. I left the food on the floor and walked to the Roxbury YMCA. I told them I needed to save my life. Whatever it took, I wanted to work out with the support of a community of people and stop digging my grave with my fork.”

It took two and a half years, but she dropped 200 pounds. “I gained and lost the weight along the way,” she says. “There’s a cultural component, and you don’t always

get the support you need.” Now, with her startup, Black Girls Nutrition, she is providing a virtual nutrition community to support women and girls of color across the country who are tackling similar challenges. Powell is in the second group of entrepreneurs supported by the Boston Foundation to expand MassChallenge’s startup accelerator program to women and people of color in Boston.

“MassChallenge helped me learn how to build a brand and leverage technology to scale my work,” she explains. “Black Girls Nutrition uses a mobile responsive web app to provide direct access, based on location, to a community of black women and girls so they can engage with a social network to keep them on track. Our goal for our clients is, ‘Lose the weight, not your culture.’ ”



*“Our goal for
our clients is,
‘Lose the weight,
not your culture.’”*

**Katia Powell, Founder,
Black Girls Nutrition**

EXPANDING THE REACH OF MASSCHALLENGE

The MassChallenge accelerator gives global entrepreneurs the resources they need to launch and grow their companies, including mentorship, workshops, office space, access to funding and a chance to win shares of more than \$1.5 million in zero-equity grants. Now the Boston Foundation is helping MassChallenge expand the reach of the innovation economy to underrepresented people of color and women. Entrepreneurs in the Foundation's 2016 class were selected through community partnerships and came from the neighborhoods of Dorchester, Roxbury and Mattapan.



“I need to be around entrepreneurs who are at different levels in their development as I pass the ‘idea’ phase of my company.”

Rica Elysee, CEO, BeautyLynk



26,000

Square feet of office space in Boston's Innovation District where hundreds of entrepreneurs work every day

“I went to Charlestown High and now my company is designing uniforms for the basketball team there!”

Peda Edouard, Co-Founder,
Mathmatik Athletics

0%

Equity
MassChallenge
takes from
successful
companies



\$450,000

Boston Foundation investment in MassChallenge over three years

“What I love is seeing people's reactions to our product. Eating ice cream is an emotional experience.”

Gwen Berlingame,
Co-Founder, Minus the Moo



\$1.1 BILLION

Outside funding raised by 835 MassChallenge startups internationally

My Summer in the City

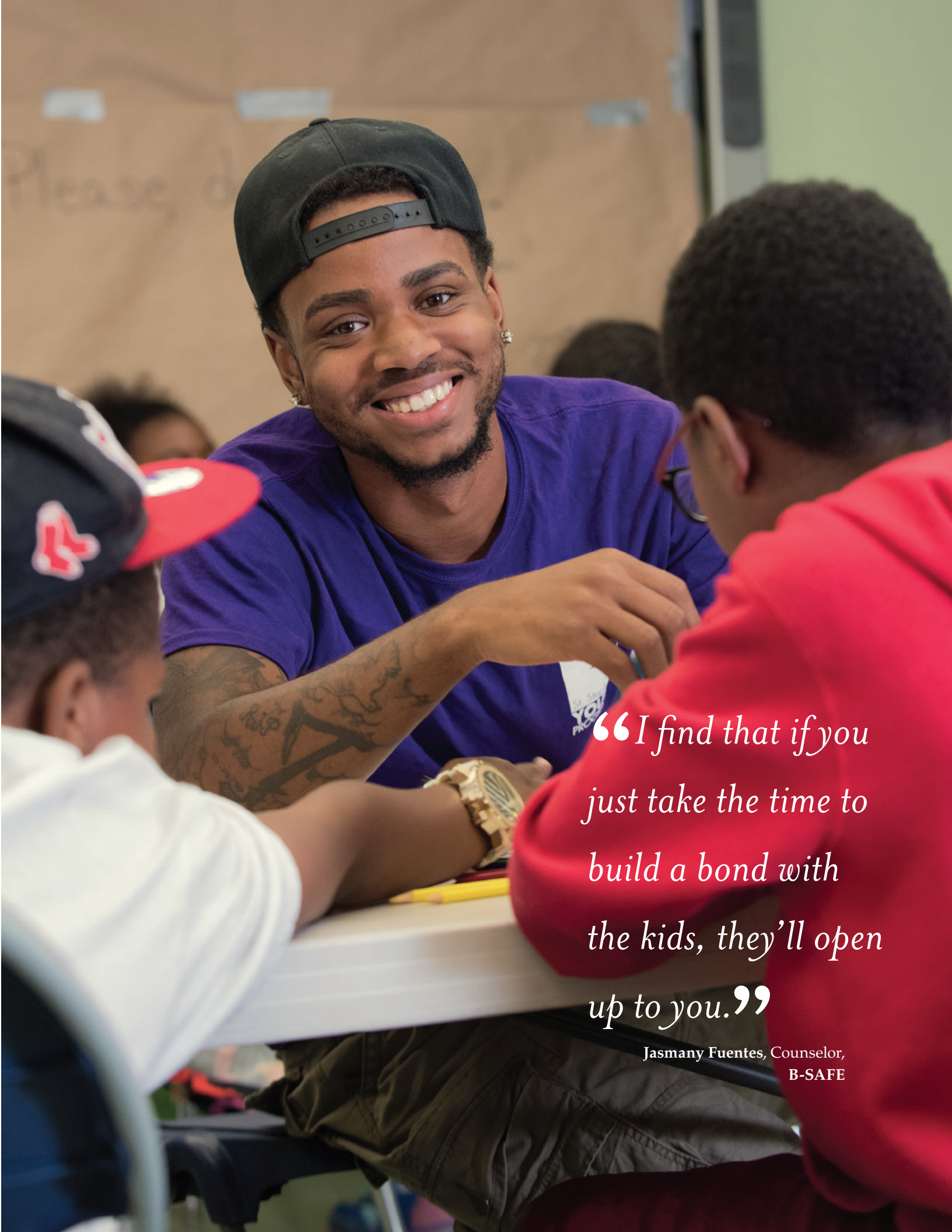
Life-Altering Summer Jobs

Jasmany Fuentes possesses a wisdom beyond his years, the byproduct of a searing family tragedy that took the life of his older brother, Jorge, four years ago in a yet-to-be solved case of gun violence. Jorge Fuentes is gone, but he is always in his younger brother's thoughts. "He had a scholarship to college and he was going to become a Marine," says Fuentes, whose own "lifelong dream" is to be an EMT. When they were little boys, both brothers benefited from an outstanding program run by St. Stephen's Youth Programs in the South End.

Today, Jasmany Fuentes is one of 160 teen counselors in a program called B-SAFE, which reaches 500 children in six locations. It has been supported for the last three years through the Boston Foundation's My Summer in the City initiative. From two nutritious

meals every day to field trips and team-building activities in the morning, followed by academic support in the afternoon, B-SAFE is designed to stem the summer learning slide and provide positive enrichment opportunities for young people.

Fuentes works hard at building relationships with the children. "I think some of the kids don't receive the love they need at home," he says. "You can tell when something's wrong: They'll be quiet or acting out and trash talking. I find that if you just take the time to build a bond with the kids, they'll open up to you." Clearly, Fuentes is good at this job—admiration and trust are written all over the faces of the children in his charge. His older brother, Jorge, would be very proud.



“I find that if you just take the time to build a bond with the kids, they’ll open up to you.”

Jasmany Fuentes, Counselor,
B-SAFE

“This is my first job and I’m learning a lot about patience.”

Moses Ntagengwa,
15 years old, Counselor,
B-SAFE



37

Community-based organizations participating in 2016

\$1.8 Million

Total investment by the Boston Foundation, our donors and other partners in My Summer in the City since 2009

M KEEPING YOUNG PEOPLE SAFE AND LEARNING

My Summer in the City was launched by the Boston Foundation and other funders in 2009 both to alleviate the uptick in violence that can accompany warm weather and school vacation, and help stem summer learning loss for low-income students. Over the last seven years, *My Summer in the City* has made grants to dozens of community-based nonprofit organizations in every neighborhood in the city—fueling a profusion of positive activities throughout the summer. In the summer of 2016, the lion’s share of the funding went to organizations and programs that employ young people, in many cases giving them their very first jobs.

“These kids are like adults without the filters; it’s fascinating to learn how their brains work!”

Alexis Daly,
17 years old, Counselor, B-SAFE



“I get up early so I can come here in time to have breakfast with the kids. This is a great first job for me.”

Iziah Laltaprasad,
14 years old, Counselor, B-SAFE

50,000

Number of low-income youth and families served

990

SUMMER JOBS FOR TEENS



Success Boston

Coaching Our City's Graduates Through College and Beyond

“College is challenging and it can be overwhelming,” says Oscar Torres. “You really need support to be successful.” A graduate of the Boston Public Schools and a sophomore at UMass Boston, Torres is the first member of his family to go to college. He is receiving the support he needs from his Success Boston coach, Portsha Franklin. “I was a first generation college student too, so I know how challenging it can be, especially applying for financial aid,” says Franklin.

A citywide partnership, today Success Boston provides coaches for 2,000 graduates of the Boston Public Schools every year. Franklin works through the West End House Boys and Girls Club, one of the nonprofits providing coaches.

For Torres, Portsha is equal parts big sister, guidance counselor, academic advisor and mentor. “She knows that doing well in science is important to my goal of going to medical school,” says Torres. “I was struggling in chemistry, so she encouraged me to reach out for support. Now I’m in a tutoring program, I have a study group and I get help from a teaching assistant.”

Franklin says, “I really think Boston is moving beyond a K-12 approach to education and is making a commitment to helping students through college and beyond.” She adds, “I believe that can be a model for other cities.”

“I really think Boston is moving beyond a K-12 approach to education...”

Portsha Franklin, Success Boston coach
(Shown here with **Oscar Torres**, Success Boston student, **UMass Boston**)





4,000

NUMBER OF STUDENTS COACHED BY SUCCESS BOSTON TO DATE

“This is the job of a lifetime.”

Danny Rivera,
longest-serving Success Boston coach,
Boston Private Industry Council

51.3%

Percentage of Boston Public Schools class of 2009 graduates earning a college degree compared to 35% for the class of 2000.

\$7.5 Million

Boston Foundation investment in Success Boston

\$6 MILLION

Additional funds leveraged through the White House’s Social Innovation Fund



“Success Boston says to students, ‘Your city believes in you. Boston has your back.’”

Danielle Galloway, Success Boston coach,
Steppingstone Foundation

RAISING GRADUATION RATES THROUGH SUCCESS BOSTON

“Through coaching, I have unconditional support in the face of adversity.”

Mena Majeed, Success Boston student,
UMass Boston

By 2018, close to 70% of jobs in Massachusetts will require a postsecondary degree, but will graduates of the Boston Public Schools be prepared to take those jobs? Since 2009, Success Boston has been making remarkable strides in answering that question with a resounding “yes.” Success Boston partners include the Boston Foundation, Mayor Marty Walsh, the Boston Private Industry Council, the Boston Public Schools and 37 area colleges and universities, led by UMass Boston and Bunker Hill Community College. Boston’s students work with Success Boston coaches to help them get ready, get in and get through college—and connected with a career. Since the initiative was launched, college completion rates have increased from 35% for the class of 2000 to 51.3% for the class of 2009. Ultimately, Success Boston is showing the kind of progress that can be made when a city comes together behind its students.



Company One Theatre

Changing the Face of Boston Through Art

“**W**e are all activists by nature,” says Mark Abby VanDerzee, Education Director of Company One Theatre, referring to himself and the three other founders of the company, which is in residence at the Boston Center for the Arts. All four went to Clark University in Worcester and formed the company when they graduated in 1998 with the goal of creating performances that sit at the intersection of art and social change, always with an emphasis on diversity.

“For us, diversity is not only of race, but of class, gender and form,” explains Shawn LaCount, Company One’s Artistic Director. Summer L. Williams, Associate Artistic Director, adds, “We promote conversations where previously unheard voices are heard.”

Williams says that another goal of the company is to “encourage the next generation to be civically minded.” To that end, company members teach the performing arts in eight Boston public schools.

Since 2012, the Boston Foundation has made grants totaling \$265,000 to the company. “The Boston Foundation’s funding was a game changer for us,” says Sarah Champnois, another founder of the organization and Managing Director. “It helped us get to the next level of professionalism.”

Clearly, Company One is vital not only to Boston, but to the entire country. The American Theatre Wing (the Tony Awards), has called it, “One of the most inspiring and innovative theatre companies on our national landscape.”



“We are all activists by nature.”

Mark Abby VanDerzee, Company One Theatre Education Director (far left), shown with the Company's other founders (from left), Sarah Champnois, Summer L. Williams and Shawn LaCount

*“When I was a child,
I had a vision: One day
I would be an artist!”*

Kadahj Bennett, actor, writer,
street poet and art teacher
in the Boston Public Schools
through **Company One**



30 Local and national
awards, including 12
Elliot Norton Awards



*“I have never seen a group
of such inspiring, dedicated
and talented people in one
place together.”*

Natsu Onoda Power,
Washington D.C. based playwright and director

95,000

Estimated number of Company One audience
members since 1998

72

Plays produced over 17 seasons

\$265,000

The Boston Foundation's investment in Company One since 2012



*“We turn to art
when we need*

*a deeper understanding
of the
human condition.”*

Kirsten Greenidge,
Resident Playwright, Company One

SUPPORTING THE ARTS

The Boston Foundation's support of Company One reflects the belief that a vibrant arts ecosystem requires a thriving and diverse community of artists and cultural institutions. To that end, in January, the Foundation released a major report on funding for the arts, comparing Boston with 10 other American cities. Boston was shown to have an extremely robust arts scene, but has less municipal support than the other cities. Now, as Boston moves forward with its “Boston Creates” cultural agenda, a major goal of the Foundation is to cultivate a community where all cultural traditions and expressions are respected, promoted and equitably resourced—and where opportunities to engage with the arts are accessible to everyone as a vital element of our city's culture of innovation.

SkillWorks

Partnering for a Productive Workforce

Luis Garcia came to the United States from Guatemala in 1990 and found good work in the Boston area, mostly with moving companies. He met and married his wife, who gave birth to their daughter. Life was good—until everything started to fall apart. Garcia was laid off and, as a result, lost his apartment. He, his wife and their daughter were forced to live apart. “I always worked,” he says, “and to be out of work and away from my family was very, very hard.”

But Garcia’s life began to turn around when he learned about the Building Energy Efficient Maintenance Skills (BEEMS) program run by the Asian American Civic Association (AACA), and supported by SkillWorks, a public/private partnership between the Boston Foundation and the City of Boston. A 22-week program, BEEMS trains participants for careers as maintenance workers and engineers—jobs that start with hourly wages as high as \$20 and can increase to \$40 an hour or more if

the worker joins a union. Participants learn the basics of maintenance, from appliance repair to painting and carpentry, as well as math and computer skills.

After Garcia completed the program, AACA staff helped him find a maintenance job with Florence Apartments in Roslindale, which quickly turned into a much better job as the superintendent of the entire complex. In exchange for being on constant call, he and his family live in a rent-free apartment there. He takes such good care of the property that he rarely gets after-hours calls.

“I can’t believe it,” says Garcia. “I have a job. We have a two-bedroom apartment and life is so good.” It is clear, however, when you meet Luis Garcia, that luck has less to do with his good fortune than participation in a great training program and his own very powerful work ethic.

*“I can’t believe
it! I have a job. We
have a two-bedroom
apartment and life
is so good.”*

Luis Garcia, Superintendent,
Florence Apartments housing complex



TRAINING WORKERS FOR FAMILY-SUSTAINING JOBS

SkillWorks was launched by the Boston Foundation in 2003 through a major partnership with national and local funders. Today, it is the largest workforce development initiative in Boston's history and has become a model for cities across the country and for the National Fund for Workforce Solutions. With investments from the Boston Foundation, the City of Boston, Bank of America and other funders, it aims to train low-skill, low-to-moderate-income people so that they can move to family-sustaining jobs and help employers find and retain skilled workers.

“This job has changed my whole life.”

Mina Chaibat, (right), Pharmacy Technician, MGH, and graduate of programs at Jewish Vocational Service (shown with **Kristen Schlapp**, ESOL Instructor, Jewish Vocational Service)

5,600

Number of job seekers and incumbent workers benefiting from SkillWorks





“My brother took this program and now he has a good job. I’m following him!”

Dieu Trong,
BEEMS participant

“I like to work with my hands, so this program is perfect for me.”

Emmanuel El Mohamed,
BEEMS participant

**\$6
MILLION**

Total Boston Foundation investment in SkillWorks since 2003

**\$20
MILLION**

SkillWorks investments leveraged from private philanthropy

13

SkillWorks partnerships with nonprofits like Asian American Civic Association and Jewish Vocational Service

The Campaign for Boston

At the heart of all of the stories told in this report and everything the Boston Foundation does—every grant it makes, every innovation it supports, every cause it champions—is its endowment, the **Permanent Fund for Boston**.

“We wanted to create momentum for the Campaign for Boston, and set an example for others,” says Richard DeWolfe, shown here with his wife, Marcy DeWolfe. Both are lifelong residents of Greater Boston and leaders in the community. Richard DeWolfe, who is Chairman of the Board of Manulife Financial/John Hancock Financial, and Managing Partner of DeWolfe & Company, said that he and Marcy DeWolfe have established a bequest of more than \$1 million to the Permanent Fund for Boston because they both believe that the endowment equips the Foundation to “innovate while supporting the institutions that make Boston a uniquely great and livable city.”

Established through bequests left by hundreds of visionary Bostonians, this essential fund fuels all of the Foundation’s work in Greater Boston and provides the resources that have sparked positive change and enabled new ideas for more than 100 years.

The **Campaign for Boston** was launched during the Foundation’s Centennial celebration in 2015, to strengthen this crucial fund and provide a permanent source of funding for future innovators and organizations focusing on the most pressing contemporary needs of our city and the region.



Donors Helping to Shape the Future of the City They Love Through the Permanent Fund for Boston

Centennial Circle

During the Boston Foundation's Centennial year, a total of \$192 million was raised for the Campaign for Boston, including \$15 million in outright leadership gifts of \$1 million or more from a Centennial Circle of donors, all prominent philanthropists who care deeply about our community. These resources served to strengthen the Permanent Fund for Boston and community grant making. We honor them here and thank them.

| | |
|------------------------------|------------------------------------|
| Anonymous (2) | Paul and Patricia Gannon |
| Charles Ansbacher Foundation | Barbara and Amos Hostetter |
| Joseph E. Corcoran | Jacobson Family Foundation |
| Desh and Jaishree Deshpande | Robert K. Kraft and Family |
| Sandra and Paul Edgerley | Robert A. and Veronica S. Petersen |
| Atsuko and Larry Fish | Stephanie and Brian Spector |
| The Flow Fund | |

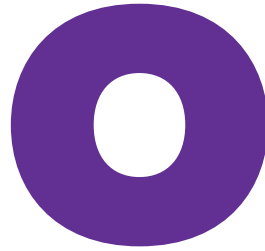
Centennial Society

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

| | |
|--------------------------------------|-------------------------------------|
| Anonymous (5) | Peni Garber |
| Diane DeSerras Arenella | Brian Hyde |
| James F. Becker and Randal D. Rucker | Jane Wegscheider Hyman, PhD |
| Rick and Nonnie Burnes | Louis and Marcia Kamentsky |
| Belden, Pamela, and Andrew Daniels | Bill Nigreen and Kathleen McDermott |
| Richard and Marcia DeWolfe | Robert A. and Veronica S. Petersen |
| Michael and Barbara Eisenson | Sam Plimpton and Wendy Shattuck |
| David J. Elliott and Hungwah Yu | Joseph G. Prone Foundation |
| Grace and Edward Fey | Lindsey A. Rosen |
| Atsuko and Larry Fish | Sandra M. Stark |

For information about how you can be a champion for the Campaign for Boston and make an outright gift or leave a bequest to the Permanent Fund for Boston, please contact the Senior Director of Leadership Giving at 617-338-3910.

Boston Foundation Legacy Societies, Funds and Donors



Over the course of more than a century, some 1,000 individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing funds at the Boston Foundation. Thousands more have contributed to funds held by the Foundation. Donors work closely with the Boston Foundation to achieve high impact philanthropy and take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list all of the funds that are held by the Foundation and the many donors who have contributed to them. Each fund has its own name, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston’s community foundation for today and the future.

MORE THAN
1,000

INDIVIDUALS, FAMILIES AND
BUSINESSES HAVE ESTABLISHED
FUNDS AT THE BOSTON FOUNDATION
SINCE 1915. THOUSANDS MORE HAVE
CONTRIBUTED TO FUNDS.

Legacy Societies

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

We thank all of these donors and honor them here.

LONGLEY LEGACY SOCIETY

Thanks to these generous donors who have confirmed legacy commitments to the Permanent Fund for Boston.

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



Scott E. Squillace, Esq. is a member of the **Longley Legacy Society**, named for James Longley, the first Bostonian to leave a major bequest to the Permanent Fund for Boston at the Boston Foundation. Mr. Squillace himself is a business and estate-planning attorney. He also serves on the board of the Boston Foundation and is Co-Chair of the Advisory Committee of the Equality Fund at the Boston Foundation, which makes grants to innovative LGBTQ nonprofits today, while building a permanent endowment to benefit the LGBTQ community in Greater Boston forever.

ROGERSON LEGACY SOCIETY

These generous donors have communicated their intention to include the Boston Foundation in their planned and estate gifts, not specifically focused on the Permanent Fund for Boston.

| | |
|--|---|
| Anonymous (16) | Charlotte I. Hall |
| Mary Lee T. and Peter C. Aldrich | Mrs. Chester Hamilton |
| G. Thomas and Allison Aley | Dean T. Hara and |
| Geoffrey D. Austrian | Congressman Gerry E. Studds* |
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| Sherwood E. Bain | Barbara Hauter Woodward |
| Mary Barber | Petie Hilsinger |
| Rich Becker | Kenneth D. and Cynthia L. Holberger |
| Laurie A. Bencal, CPA | Chuck Holland |
| Doreen B. Biebusch | Helen R. Homans |
| Thomas W. Bird | Emily C. Hood |
| David Blot | Marjorie Howard-Jones |
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| Joe Fiorello | Douglas D. and Geraldine Payne |
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| Dr. G. Anne Guenzel | Agatha W. Poor |

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 Annabelle W. Shepherd
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 Arthur L. Stevenson
 Anne B. Stone
 Elihu and Bonnie Stone
 Anne Thompson
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 Robert R. Wadsworth and
 Catherine E. Moritz
 J. H. Walton, Jr. and Carolyn Walton
 Charles and Patricia Westwater
 Constance V. R. White
 Eric S. and Linda H. White
 Jeffrey and Theresa Whitehead
 Inge J. Wetzstein
 Michael N. and Mary M. Wood
 Eleanor D. Young



Amy Zell Ellsworth is a member of the **Rogerson Legacy Society**, named for Charles E. Rogerson, the founder of the Boston Foundation, and his son Charles M. Rogerson, who directed the Foundation for its first 30 years. Ms. Ellsworth has been a dancer, choreographer, teacher, philanthropist and a philanthropic advisor through The Philanthropic Initiative. Today, she is working closely with the Foundation on an initiative called Next Steps for Boston Dance, which provides grants and other support to Greater Boston choreographers at seminal points in their budding careers.

**deceased*

Funds and Donors

THE PERMANENT FUND FOR BOSTON

The Permanent Fund for Boston is the Boston Foundation's endowment and the most flexible fund it holds, giving our staff and board members the crucial resources they need to respond to the most pressing issues facing contemporary Greater Boston. Many donors have contributed to this fund since the Foundation was first established in 1915. In honor of its Centennial in 2015, the Boston Foundation launched the ongoing *Campaign for Boston* to strengthen this important fund, which supports grants in Education, Health & Wellness, Jobs & Economic Development, Neighborhoods & Housing, and Arts & Culture—all areas that have a profound impact on the quality of life in Greater Boston.

UNRESTRICTED 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 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 in bold type.

The Rev. Ray A. Hammond Fund for the Neighborhoods of Boston

In 2009, a fund was established as a tribute to **Reverend Ray Hammond**, who had served as the Chair of the Boston Foundation since 2001. During his remarkable tenure, the Foundation extended its work in the community far beyond grant making—and became a major civic leader for our city and region. This fund was established with \$1 million and is a permanent, unrestricted fund that provides the flexible resources the Foundation's staff and board need

to respond swiftly and nimbly to the greatest challenges facing our community.



- Emily Tuckerman Allen Fund (2006)
- Geno A. Ballotti Fund (1984)
- Irene W. Bancroft Fund (1997)
- James R. Bancroft Trust Fund (1984)
- Harriett M. Bartlett Fund (1987)
- J. E. Adrien Blais Fund I (1967)
- Live Arts Boston (LAB)** (2016)
- Franklin S. & Cynthia B. Browning Fund (1988)
- Frank B. & Watson G. Cutter Fund (1984)
- James Dean Fund (1946)
- Katherine E. Dooley Fund (1997)
- Herbert and Lucy Fields Fund (2008)
- Edward Glines Fund (1938)
- Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2009)
- Nathaniel Hooper Fund (1938)
- Grace A. Jacobs Fund (1988)
- Michael B. Keating Fund for Justice and Social Equity** (2016)
- Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2006)
- Polaroid Fund (1997)
- Ruth M. Reiss Memorial Fund (1997)
- Samuel H. & Lizzie M. Robie Trust Fund (1982)
- Walter J. & Marjorie B. Salmon Fund (1999)
- Robert Wadsworth Fund for the Future of Boston (2008)

FIELD OF INTEREST FUNDS

These funds are directed to a particular issue or area of concern. Many were established by families or organizations wanting to honor loved ones or colleagues by naming a fund after them.

The year each fund was established is in parentheses. New funds are bold and italicized.

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

Anonymous Fund (1987)

Arts Fund (1997)

Edith Allanbrook Fund (2002) To provide for children with extraordinary promise in the arts

Boston Parks Access Fund (2002) To the Boston Parks Department or the Arnold Arboretum of Harvard or to the administrators of other public park land within the City of Boston

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

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

Anna Faith Jones Arts Fund (2000) Recognizing and honoring the leadership of Anna Faith Jones and her special commitment to 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 (2007) For the support of struggling artists working in any and all media in the Greater Boston area

Brooks White, Jr. Memorial Fund (2007) A component fund of the Boston Foundation Arts Fund

Edith M. Ashley Fund (1960) Primarily for the aid of blind and physically disabled persons

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

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

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

Emily Budd Fund (1960) For fresh air vacations for underprivileged children

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

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

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

Curtis International Council Fund (2000) To promote international peace and understanding, and to foster cooperation and increase communication among diverse organizations

David W. Cushing Fund (1987) For charitable work that will assist young people, particularly women

Mabel Walsh Danforth Fund (1949) For education, assistance or relief of physically disabled children

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

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

Annie S. Dillaway Fund (1965) To promote the welfare of young people

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

Equality Fund (2011) For organizations that serve the LGBTQ community of Greater Boston

Mary C. Farr Arts Fund (2005) 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 (1979) For the benefit and welfare of elderly men and women, and for research into the care of the elderly

Fund for Self-Reliance (1989) For developing long-term solutions that go beyond traditional emergency responses to homelessness

- General Support Fund for Education (1988)
- Elizabeth D. Goldsmith Fund for Families (2010) To support families in the Greater Boston area
- Charles W. Hapgood Trust Fund (1986) 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 (2001) For organizations in the Greater Boston area that are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn
- Mary Harris Fund (1940) For widows and single women in straitened circumstances
- Grace L. Holland Fund (2007) 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 for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances
- Jamaica Plain Dispensary Fund (1962) For the benefit of poor people in or near Jamaica Plain, particularly for health related needs
- Charles Frederick Joy and Dora Marie Joy Fund (1992) For summer vacations for two worthy Protestant girls and one boy; with any excess income used to help in the care of sick Protestant children or Protestant girls or women
- Kellogg Foundation Fund for Haiti (2012)
- Kraft Family Non-Profit Emergency Fund** (2015) For rapid response assistance grants to small- and mid-size 501(c)3 non-profits 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** (2015) For the enhancement of the quality of life for the homeless of Greater Boston
- Edith Shedd Larsen Fund (1962) To aid and advance research toward the cure and relief of arthritis
- Latino Legacy Fund (2012) To strengthen Latino nonprofits and leaders, improving educational outcomes for Latino children, creating economic opportunities for Latino families and improving health and overall quality of life for Latino families
- Maude A. MacNaught Fund (1979) Preferably for children suffering from diseases of the eye
- Azad & Doris Maranjian Charitable Trust Fund (2009) To be used for organizations helping the disabled achieve 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 (1983) To promote sound government
- Willis Munro Fund (1989) For the relief, care, health, comfort, maintenance and support of needy adults; or maintaining and operating a home for needy adults in Boston; or to furnish funds for the purpose of enabling needy adults to live in their own homes
- Harry L. Nason Fund (1953) Preferably for the care of elderly Protestant men and women
- Florence Arnaud Newton Fund (1955) For the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1954) For aid to needy gentlewomen
- 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 the need for food, shelter and health care
- Norman Everett Pearl Fund (1996) For recognized charities in the Boston area
- Janet S. & George T.B. Perkins Fund (2000) For the benefit of children living in Boston, including programs benefiting 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** (2015) 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 (1996) For organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Alice F. Rosenquist Fund (1984) With preference to organizations that assist the elderly or blind
- Louis Agassiz Shaw Fund (1991) For the benefit of underprivileged children
- Katherine Dexter Shelman Fund (1954) For the benefit of worthy aged people

Arthur L. Sherin and Frances C. Sherin Fund (2003) For aid to the blind or disabled, 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 (1948) For the 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 the care of poor and elderly people who are in need, especially women

Carroll J. Swan Memorial Fund for Children's Charities (1935) For summer vacations for needy children of Greater Boston

The US-Nepal Fund at the Boston Foundation (2015)

Nelson E. Weeks Fund (1937) For the alleviation of suffering in major Boston hospitals

Fanny Wharton Fund (1919) For the relief of poor, sick young women and children

Katherine C. Wheeler Fund (1987) 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, wetlands, 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 that promote and encourage bird life, primarily on land in New England owned or controlled by conservation organizations

Ruth and Henry Walter Fund (2010) To maintain, in their natural condition, woodlands, open areas, wetlands, 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 (1953) To provide assistance, educational aid and training at institutions other than usual four year colleges

Mary Denny Williston Fund (1969) For summer camp vacations for children; for work with alcoholics

Window Shop Fund (1988) To provide educational aid, including but not limited to the ACCESS Program, and other assistance for refugees and foreign born residents of the United States

Gladys W. Yetton Fund (1969) For widows and single women in straitened circumstances

The Free for All Concert Fund Ambassador

Swanee Hunt was instrumental in bringing this Field of Interest Fund to the Boston Foundation. The fund was established two years ago to perpetuate the vision of her late husband, the internationally renowned conductor and civic leader Charles Ansbacher, who founded Boston Landmarks Orchestra. The mission of the fund is "to ensure that everyone from the Boston region—children, adults, families—will have regular and permanent access to the rich world of classical, orchestral music and related

cultural events." Through grants to nonprofits, the fund supports free performances in Boston's diverse neighborhoods.



GIFTS TO THE PERMANENT FUND FOR BOSTON

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

Individuals, Corporations and Foundations

Anonymous (2004, 2010, 2013, 2015, 2016)
Pamela D. Adams (2016)
Joel Alvord and Lisa Schmid-Alvord (2014)
Charles Ansbacher Foundation (2015)
Mr. and Mrs. Peter Brooke (1994)
The Boston Company (1991)
Brother Thomas Charitable Foundation (2007)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
Catherine and Paul Bittenwieser Foundation (1998)
William Putnam Cabot (1970)
Linda Cabot Black Foundation (2005)
Kevin T. and Julie Callaghan (2016)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation, Inc. (2007)
Combined Jewish Philanthropies of Greater Boston, Inc. (2007)
Commonwealth of Massachusetts (2009)
Michael F. Cronin (2004)
Theodore H. Cutler (2015)
Lawrence and Susan Daniels Family Foundation (2003)
Davis Family Charitable Foundation (2016)
John H. Deknatel and Carol M. Taylor (2016)
Wm. Arthur Dupee Memorial Fund (1984)
Dusky Foundation (2013)
Eastern Bank Charitable Fund (2014)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
First National Bank of Chicago (1988)
Martha M. Fosdick Fund (1978)
Lucille Francis (2014)
MFS Investment Management (2014)
John Lowell Gardner Fund (1987)
Gonzalez Saggio & Harlan LLP (2014)
Grand Bostonians Dinner (1984)
Anne C. Gray (2010)
John Hancock Life Insurance Company (2014)
Mrs. Jean Hanlon (1991)
Haymarket People's Fund (1994)
HBB Foundation (1995)
Katherine B. Hood (2000)
Donald J. Hurley Memorial Fund (1978)
Jane W. Hyman (2002)
Institute for Affirmative Action (2007)
Greg and Maria Jobin-Leeds (2014)
Stephen P. Jonas (2007)
Ross Jones and Emily Nielsen Jones (2015)
John S. and James L. Knight Foundation (2009)
Dr. & Mrs. Arthur R. Kravitz (1987)
George and Ellen Lovejoy (2015)
Mr. and Mrs. Gael Mahony (1982)
Anne E. Markus (2016)
Reinier Moquete (2013)
Wilbert G. and Eunice Muttart Foundation (2007)
Northern Trust (2005)
The Overbrook Foundation (1991)
Partners HealthCare System, Inc. (2013)
Francis Ward Paine Foundation, Inc. (1982)
Phillip Perelmutter (2013)
Philanthropic Collaborative, Inc. (2005)
David R. Pokross, Jr. (1996)
Joan Pokross Curhan and Ronald C. Curhan (2004)
William J. and Lia G. Poorvu (1996)
Harry & Minnie Rodwin Memorial Fund (1975)
Pamela M. Smith (2006)
Reynolds R. and Pamela M. Smith Foundation (2008)
Dr. W. Davies Sohler, Jr. (1990)
Mrs. Helen Spaulding (1992)
Starr Foundation (2005)
Matthew J. & Gilda F. Strazzula Foundation (2000)
Gertrude T. Taft (1956)
Tech/Ops, Inc. (1982)
United Asset Management Corporation (1994)
Herb and Charlotte Wagner (2014)
H. Reed Witherby and Ivers Bever (1994)
Ms. Hungway Yu and Mr. David J. Elliott (2002)
Albert and Judith Zabin (2008)

Estates

Anonymous (2016)
Alice A. Abbott (1967)
Emily T. Allen (2006)
Matilda S. Alley (1964)
Miriam S. Alley (1965)
Margaret Sears Atwood (1970)
Margaret E. Babcock (1973)
Annie O. Baldwin (1953)
Wilbert S. Bartlett (1969)
George P. Beech (2009)
Reginald Benting (1984)
William L. Birely (1959)
Edmund Bridge (1933)
Frederick W. Bridge (1942)
Jesse F. Burton (1971)
Susan Cabot (1947)
Charles T. Carruth (1983)
Gladys Chiquoine (1983)
Helen A. Claflin (1992)
William H. Claflin (1983)
Winifred I. Clapp (1990)
Horace W. Cole (1992)
Anastasia Conte (1988)
Arthur S. Cummings (1943)
Charlotte E. H. Curtis (1940)
Maria Corinne Dana (1963)
Luisita L. Denghausen (1990)
Kenneth S. Domett (1960)
Mary Frances Drown (1929)
George H. Eastman (1971)
Mary Farr (2006)
Lucy Fields (2008)
Benjamin Fisher (1996)
Edith R. Fottler (1948)
Alma L. Frost (1948)
Anna C. Frothingham (1941)
Forrest C. Gates (1970)
Mary M. Geist (1982)
Pauline S. Germeshausen (2006)
Anne C. Gray (2010)
Donald Gregg (1963)
Patricia Grisham (1964)
Joseph Guild (1964)
John Hagopian (2002)
Ellen Page Hall (1931)
Dorothy C. Harris (1967)
Elizabeth M. Hay (1972)
Fred R. Hayward (1969)
Elizabeth D. Herteli Trust (2005)
Vladimir H. Herteli Trust (2005)
Anna P. Hills (1969)
Harry Holland (2007)
Agnes G. Homes (1961)
Adeline D. Hooper (1973)
Mary Frothingham Hooper (1961)
Elizabeth B. Hough (2002)
Elizabeth B. Hurley (2000)
Frances A. Jordan (1978)
Paul Kimball (1964)
James G. Knowles (1982)
Ida Fales Lamb (1967)
James Longley (1918)
Clara N. Marshall (1943)
Ann G. McFarlane (2000)
Arthur W. Moors (1950)
John Wells Morss (1940)
John Adams Paine (1967)
Winthrop D. Parker (1967)
Annie S. Penfield (1979)
Blanche E. Philbrick (Merchant E. Philbrick Fund) (1965)
Mary N. Phillips (1974)
J. Christie Pingree (1957)
Carrietta W. Proverbs (1984)
Bertha J. Richardson (1975)
Frank L. Richardson (1975)
Mabel Louise Riley in memory of Charles Edward Riley and Agnes Winslow Riley (1972)
Riley and Agnes Winslow Riley (1972)
Jordan S. Ruboy, M.D. (2011)
Helen S. Sharp (1966)
Frank R. Shepard (1954)



Juliette Christie Pingree

(left) had deep Boston roots. Her father was headmaster of Boston Latin School for 25 years and her husband, Arthur Howe Pingree, *(right)* was a minister who was said to have founded one of the first Boy Scout troops in America. He and Juliette Pingree, who was known for her “can do” attitude, were beloved by their congregation. Arthur Pingree died in 1915 trying to save two girls from drowning. When Juliette Pingree died, in 1957 at the age of 85, she left a bequest to the Permanent Fund for Boston to benefit the community that had shaped her life.

Anne G. Shewell (1984)
Alice Wilder Smith in memory of Frank Langdon Smith (1968)
Eleanor Smith (1986)
Pamela M. Smith (2008)
Francis M. Stanwood (1961)
Albert J. Stone, Jr. (1960)
Mary P. Stone (1948)
Lenna R. Townsend (1952)
Willis S. Vincent (1940)
Clarice M. Wagner (1993)
John M. Ward (1927)
Madeline Cobb Webber (1973)
Louise M. Weeks (1944)
Arthur W. Wheelwright (1963)
Estate of Stetson Witcher (2008)
Joseph A. White (1979)
Edward E. Williams (1950)
Lizzie A. Williams (1951)
Albert and Judith Zabin (2007)

Trusts

Anonymous (2015)
Margaret Shaw Allen Trust (1982)
James R. Bancroft Trust (1983)
Helen C. Barker Trust (1990)
Nancy Beals Trust U/W (1984)
Diane Beever Charitable Remainder Unitrust (2008)
Reginald Benting Charitable Remainder Unitrust (2009)
Richard A. Berenson Family Trust 1972 (2000)
Nelson Bigelow Trust (1990)
Mabel M. Brown Trust (1991)
A. Page Browne Jr. Trust (2006)
The Cynthia B. Browning 1992 Trust (2006)
Franklin S. Browning, Jr. 1992 Trust (2008)
Ellen E. Carroll Trust U/W (1979)
Robert M. Christison Trust U/A (1984)
Ford H. Cooper Trust (1982)
Anne H. Davis Trust U/Ind (1964)
Gladys Dean Trust U/Dec (Laurence Guild Dean Fund) (1977)
Paul Elliott Trust U/Agreement (1991)
Ruth S. Frake Trust Bequest (1981)
Elizabeth D. Goldsmith 2005 Charitable Remainder Trust (2010)

Charles Hapgood Trust (2009)
Carrie A. Hartley Trust U/Ind (1963)
Helen P. Hennessey Trust (1984)
Ada H. and Clara Hersey Trust U/Ind (1955)
Elizabeth D. Herteli Trust (2003)
Vladimir N. Herteli Trust (2003)
George L. Hill Trust (2002)
Frances C. Huvos 1983 Trust (2011)
Mark Hyman, Jr. Insurance Trust (1999)
Cyril H. Jones Trust U/Ind (1974)
Pauline Kleven 1988 Trust (1990)
Aimee Lamb Trust U/Ind in memory of
Winthrop and Aimee Sargent (1980)
Lambert Marital Trust (2006)
Barbara Estabrook Livermore Trust (1982)
Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund) (1973)
Mason Charitable Remainder Annuity Trust (2005)
Adalaide Sargent Mason Trust (1982)
Phyllis McGillicuddy Trust (1993)
Ethel Fay McGuire Trust U/Ind (1973)
David D. Moir Revocable Trust (1992)
Gertrude Morrison Trust U/Ind (1965)
Hetty R. Phillips 1974 Trust (1980)
Robert O. Preyer Charitable Lead Unitrust (1992)
Esther Frances Quinn Trust (1995)
Harriet Rogers Unitrust (1990)
Florence M. Scott Trust U/W (1971)
George F. Shadwell Trust (1990)
Arthur L. Sherin Trust (2008)
J. de Vere Simmons Trust (1985)
Edson B. Smith Trust U/A (1984)
Irene C. Smith Trust U/A (1975)
Florence Snelling Trust (2006)
The William D. Sohler Marital QTIP Trust (2014)
Spaulding-Potter Charitable Trusts (1972)
Esther G. Stoddard Trust Under Will (2006)
Margaret Castle Tozzer Trust U/Ind (1978)

DONORS TO THE CIVIC LEADERSHIP FUND 2015-2016

We are deeply grateful to the following donors whose support of the annual campaign for the Civic Leadership Fund has provided the resources to commission fresh research, advance public policy on critical issues, and promote civic engagement and dialogue on the most pressing needs facing our city and region.

\$100,000+

Anonymous (1)
Jack and Elizabeth Meyer

\$50,000 – \$99,999

Josh and Anita Bekenstein
Paul and Sandra Edgerley
Amalie Kass
The Klarman Family Foundation

\$25,000 – \$49,999

Amy and David Abrams
Thomas and Lisa Blumenthal
Michael and Barbara Eisenson
John Hancock Life Insurance Company

Michael and Barbara Eisenson

are both active in Boston's nonprofit community. Michael Eisenson co-founded the organization Horizons for Homeless Children. Barbara Eisenson is a Trustee of the New England Aquarium and Board Chair of the U.S. Fund for Unicef, New England Region, which engaged over 10,000 Boston Public Schools students in its Kid Power program in 2016. They support the Civic

Leadership Fund because they believe the Boston Foundation is "in a unique position to identify and work on the

most important issues facing our city today."



Amos and Barbara Hostetter
Joanna and Jonathan Jacobson
Robert K. Kraft & Family
Barbara Kravitz
Michael Krupka and Anne Kubik
Alan and Harriet Lewis
George and Ellen Lovejoy
David and Louise Weinberg

\$10,000 – \$24,999

Anonymous (6)
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Arthur Winn



Robert and Elizabeth

Pozen Civic Leadership Fund donors Robert and Elizabeth Pozen are deeply committed to top flight educational standards and academic achievement in Boston's schools, which led them to collaborate with the Boston Foundation to establish the Pozen Prize for Innovative Schools in 2014. The prize awards \$80,000 every year to an innovative Greater Boston school. They support the Civic Leadership Fund because of the Foundation's leadership in education reform in Greater Boston and throughout Massachusetts.

\$5,000 - \$9,999

Anonymous (1)
Walter and Alice Abrams
Pamela D. Adams
Amy Anthony
Blue Cross Blue Shield
Barry Bluestone
Brian and Karen Conway
Richard and Marcia DeWolfe
Douglas and Susan Donahue

The Drew Company, Inc.
Steven and Nancy Fischman
John and Cynthia Fish
David and Anne Gergen
Robert and Linda Glassman
Carol and Avram Goldberg
Rev. Ray Hammond and
Dr. Gloria White-Hammond
Harvard Pilgrim Health Care
Robert and Diane Hildreth
Joseph Hooley and Linda Spiro
Ambassador Swanee Hunt
Stephen and Cheryl Jonas
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Alan and Sherry Leventhal
Charles and Susie Longfield
Robin MacIroy and William Spears
Duncan McFarland
Jane Mendillo and Ralph Earle III
National Grid USA
Peter and Beatrice Nessen
Joseph and Katherine O'Donnell
Stephen and Judy Pagliuca
Glenn and Faith Parker
Deval and Diane Patrick
Joseph G. Prone Foundation
Ellen Remmer and Chris Fox
John and Dorothy Remondi
Robert Reynolds
Rutabaga Capital Management
Greg and Michelle Shell
Robert and Jean Sheridan
The Sidman Family Foundation
John and Susan Simon
Robert Small and Christine Olsen
Raymond and Maria Stata
Michael and Maria Tooke
Gregory Torres and Elizabeth Pattullo
Tufts Health Plan
Hans and Ann Ziegler

\$2,500 - \$4,999

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Michael and Linda Frieze
Gardiner Howland Shaw Foundation
Gourmet Caterers
Robert Grinberg
Anthony and Brenda Helies
Edmund and Margaret Ingalls

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Jill Ker Conway and Mark Leahy
Shari and Robert Levitan
Richard and Nancy Lubin
McCall & Almy, Inc.
James and Maureen Mellowes
David and Mary Ellen Moir
William and Brooke Muggia
Jerry Rappaport, Jr. and
Lori Platt Rappaport
Donald Rodman
Rohda Family Charitable Foundation
William Schawbel and Judy Samuelson
David and Stephanie Spina
James M. and Cathleen D. Stone

\$1,000 - \$2,499

Anonymous (5)
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Carol and Howard Anderson
W. Gerald Austen and Patricia Austen
A.W. Perry, Inc.
Marta Bach
James Bailey
Bank of New York Mellon
David Begelfer
Joan Bok
Boston Private Bank & Trust Company
Catherine and Paul Buttenwieser
Foundation
Thomas Butters
Appy and Susan Chandler
Gerald and Kate Chertavian
Ciccolo Family Foundation
Susanna and Ferdinand
Colloredo-Mansfeld
Constance and Lewis Counts
Stephen Crosby and Helen Strieder
Robert Crowe
John and Diddy Cullinane
Curriculum Associates
J.H. Daingerfield and Constance Perry
Catherine D'Amato and Debbie Ford
Timothy and Maureen Dibble
Ronald Druker
William Edgerly
Lee Ellsworth and Amy Zell Ellsworth
David and Nina Fialkow
Barbara Fish Lee
Barbara Freedman Wand and
Mitchell Wand
Alan and Judy Fulkerson
M. Dozier Gardner
Bink Garrison
Charles and Anne Gifford
Roger Greene

Josh and Sarah Greenhill
Paul S. Grogan
Steven and Barbara Grossman
Kate Guedj
John Hamill
Harold Whitworth Pierce Charitable Trust
Lucius and Wendy Hill
Hill Holliday
Rosalind Gorin and Matthew Budd
Thomas and Diane Hollister
Tom and Nancy Howley
Charles and Charlene Hyle
Income Research & Management
Isaacson Miller, Inc.
Ira Jackson
Jackie L. Jenkins-Scott and James M. Scott
Helen Jones
Martin and Wendy Kaplan
Becky Kidder Smith and Thomas Smith
Peter C. Knight and
Deborah Sanford Knight
Charles Kravetz
Paul and Mary La Camera
Edward and Berthe Ladd
John and Nancy LaPann
Paul and Mary Lee
Thomas and Barbara Leggat
Jo-Ann and Martin Leinwand
Linde Family Foundation
Edward Masterman
Kevin McCall
Robert Meenan
Barbara and Robert T. P. Metcalf
Gabrielle Miller
Bryce Mochrie
Michael Mooney
Herbert Morse and Ellenjoy Fields
Frances Moyer
Sherif and Mary Nada
Tami Nason and Kent Lage
J. Keith and Angela Motley
National Development
Novack Family Foundation
Thomas O'Neill
Anthony Pangaro
Veronica and Robert Petersen
Kevin and Anne Phelan
Daniel Raizen
Dusty Rhodes
Karen Richards
Mitchell and Jill Roberts
Jordan Ruboy
Paul and Ann Sagan
Mark and Marie Schwartz
James Segel

Roger Snow and Harron Ellenson
 Alan D. and Susan Lewis Solomont
 Lionel and Vivian Spiro
 Scott E. Squillace, Esq.
 David and Patricia Squire
 Michael and Jill Stansky
 State Street
 John and Nadine Suhrbier
 Summit Financial Corporation
 Emily Wade
 James Whitters, III
 Benaree P. and Fletcher H. Wiley
 George Wilson IV and Judy Wilson
 Christopher and Nancy Winship
 Marshall and Katharine Wolf
 Megan and David Zug
 Linda and D. Brooks Zug

Up to \$999

Anonymous (5)
 Jon Abbott and Shari Malyn
 Zamawa Arenas
 Kirstan Barnett
 Scott Bartley and Christopher Norris
 Thomas Bentley
 Kevin Bolduc
 Richard and Gail Buck
 Meg Campbell
 Cynthia Chace Macniel
 Paul Ciampa
 Kathleen Clute
 Lawrence and Nancy M. Coolidge
 Joseph Cronin
 Donna Cupelo
 Corey Davis
 Carmen Denyes
 Gerry and Kathleen DeRoche
 Lawrence S. DiCara
 Robert Donnelly
 Michael Douvadjian and Lynne Brainerd
 David and Marion Ellis
 Ellen Epstein and Ian Brownell
 Susan Y. Friedman
 Tim and Corinne Ferguson
 Daniel Fleishman and Barbara Shapiro
 Laurence Flood and Mary Tyler Knowles
 Tom and Carla Fortmann
 Robert and Rochelle Friedman
 Brendan Furey and Tara Henry
 John and Beth Gamel
 Timothy and Mary Anne Gassert
 Rev. Gregory Groover, Sr.
 George and Daphne Hatsopoulos
 William and Jodi Hess
 Petie Hilsinger

Amber Holtzclaw
 Anna Inman
 Jeffrey and Susan Jones
 Lawrence Jordan and
 Myechia Minter-Jordan
 Julia Joy Berk
 J.P. Morgan Chase Foundation
 Charlotte Kahn
 Jonathan and Judith Keyes
 Kenneth Knox
 Garrett Larivee
 Law Firm of Bove & Langa, P.C.
 Mary Kay Leonard and
 Richard W. Valachovic
 Brooke Manfredi
 Ted McEnroe
 James and Katherine McHugh
 Mary Jo Meisner
 Scot and Lorraine Miller
 William Nigreen and
 Katherine McDermott
 Arthur and Judith Obermayer
 Vincent O'Donnell
 Carol and Thomas O'Donnell
 Penn Mutual Life Insurance Company
 Anne Perry
 Planned Giving Group of New England
 Jeffrey Poulos
 Bernard and Suzanne Pucker
 Hanson Reynolds and Sharon Gray
 Marie Roberts
 William G. Rogerson
 Elizabeth Saltonstall
 Helen Chin Schlichte
 Marylyn Schultz
 Shawmut Woodworking and Supply
 Daniel and Jennifer Sherman
 Ellen Simons
 Tim Smith
 Gary and Lynne Smith
 Gail Snowden
 William and Christine Speciale
 Micho Spring
 Naomi Sweitzer and Andrew Shalit
 Peter and Laurie Thomsen
 John Towers
 Alfred and Marta Van Ranst
 William Walczak
 WCVB-TV; Channel 5
 Robert and Joan Weinstein
 Jennifer Winn Aronson
 Katherine Winter
 Alice Wolpert
 Michael Yogman
 Albert and Judith Zabin

Reverend Dr. Gregory G. Groover, Sr.

is pastor of the Historic Charles Street A.M.E. Church in Roxbury. Having served as Chairman of the Boston School Committee and President of the Black Ministerial Alliance, he says that he supports the Civic Leadership Fund because it has “stepped up for education and the young people of our community in a very powerful way—and it focuses on the full education pipeline, all the way through college.”



Micho Spring

“I see the Boston Foundation as an agent for change,” says Civic Leadership Fund donor Micho Spring, who leads Weber Shandwick’s Global Corporate Practice. “The Foundation is contributing a tremendous amount of ‘thought leadership’ and has the ability to bring diverse groups of people to the table.” Spring helped to launch the Latino Legacy Fund at the Boston Foundation, which is building an endowment to benefit Greater Boston’s Latino community.



DONOR ADVISED FUNDS

The following is a list of all Donor Advised Funds established by individuals, families and companies choosing to be actively involved in their charitable giving.

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

3C Fund (2012)
63 Marlborough Street Fund (1984)
A & E Educational Quest Fund (2004)
AADS Memorial Fund (2004)
Walter and Alice Abrams Family Fund (2005)
Abromowitz/Ruttenberg Family Fund (2000)
Acacia Fund (2004)
Adler Family Fund (2006)
Adlib Foundation (2010)
Adopt-A-Statue Program - Bill Russell Legacy Project (2013)
Adopt-A-Statue Endowment Fund (1988)
Affinity Services Corporation Fund (2003)
The Akili Fund (2016)
James F. Alenson Memorial Fund (2007)
Aley Fund (2009)
Aliad Fund (1993)
Emily T. Allen, Linda P. Allen and F. Towne Allen
Charitable Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1995)
George and Nedda Anders Fund (1991)
Barbara Jane Anderson Fund (2000)
Selma and Bayness Andrews Fund (2006)
Michael & Ellen Angino Fund (1997)
Anony Fund (1998)
Ansara Family Fund (2006)
Anthes Weitz Family Fund (2015)
Anthropologists' Fund for Urgent Anthropological
Research (1996)
APOC Fund (2011)
Arba Lifnot Boker Fund (1992)
Arch Stanton Charitable Fund II (2016)
Armony Erel Charitable Fund (2008)
Atalaya Fund (2004)
Atlantic Fund (1997)
Ausschnitt Fund (2004)
Victoria J. Avery Charitable Fund (2014)
Kathryn and Charles Avison - Miriam Avison
Charitable Fund (2005)
Susan M. Aygarn and Michael R. Aygarn
Charitable Donation Fund (2012)
Back Porch Fund (2014)
Bagley Family Fund (2016)
Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)
M. Baldwin Family Fund (2015)
Balzer/Bellinger Fund (2007)
John & Judith Barber Fund (2002)
Richard Allan Barry Fund (2002)
Hanna and James Bartlett Fund (2014)
Baudanza Family Fund (1997)
Baupost Group Charitable Fund (2004)
Beachcomber Fund (2008)
Belinda Fund (2011)
Benjamin Foundation (2005)
William D. & Mary E. Benjes Fund (1984)
Jane Bernstein Fund (2006)
Best Doctors Charitable Foundation (2010)
Charlotte Saltonstall Bigham Memorial Fund (2004)
Bird Fund (1999)
Bill Bither Charitable Fund (2013)
Bitpipe Legacy Fund (2004)
Black Philanthropy Fund (2008)
NICSA/William T. Blackwell Scholarship Fund (1995)
Emmanuel and Jane Blitz Fund (1992)
Tom and Lisa Blumenthal Family Foundation (2005)
Joan T. Bok Fund (1997)
Bolze Family Fund (2013)
Boston City Hospital Social Service Fund (1981)
BPE/Bank of Boston 200th Anniversary Fund (1982)
Braverman Family Fund (1992)
Bride/McEnany Fund for Safer Women (2014)
Bronner Charitable Foundation (2006)
Peter A. Brooke Fund (1998)
Brooke Family Donor Advised Fund (2007)
Peter W. and Ruth H. Brooke Fund (2004)
Buckman Fund (2010)
Dean Bullock Family Fund (1997)
Bill and Barbara Burgess Fund (2002)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1988)

Kairos Butler Fund (1994)
 Butler's Hole East (2011)
 Butler's Hole Fund (1994)
 Butler's Hole North (2011)
 Butler's Hole South (2011)
 C & K Foundation Fund (2000)
 Norman L. Cahners Fund (1984)
 Campbell Foundation Fund (2003)
 A. Bruce Campbell Fund (2002)
 Krystle Campbell Memorial Fund (2013)
 C. Alec and Sarah O' H. Casey Charitable Fund (1993)
 Margaret W. Casey Fund (1986)
 Alice F. Casey Fund (2006)
 Ellen W. Casey Fund (1993)
 Champa Charitable Foundation Fund (2003)
 Charlestown Benevolent Fund (2010)
 Charlestown Fund (2008)
 Chasin/Gilden Family Fund (2000)
 Charles Ezekiel and Jane Garfield Cheever Fund I & II (2006)
 Chelsea Community Fund (1997)
 Joyce Chen and Helen Chen Foundation Fund (1995)
 Chertavian Family Fund (2005)
 Christ on Earth Fund (1989)
 Michael W. Christian Memorial Fund (1986)
 Dr. & Mrs. B.U. Chung Fund (1999)
 Chung Family Fund (1999)
 Churchill Family Fund (1997)
 Circle Fund (1997)
 Civic Engagement Fund (2010)
 CJE Foundation Fund (2007)
 Clark Family Fund (2010)
 Clarke Fund (1987)
 Clementine Fund (2014)
 Coit Family Fund A (2001)
 Colby Charitable Fund (1980)
 Colony Road Fund (1997)
 Condor Street Fund (1988)
 Constance and Lewis Counts Fund (1990)
 Coolidge Family Fund (1982)
Pat Cook Fund (2016)
 Cooper Leeser Family Fund (1997)
Stephanie Dodson Cornell and James Cornell Family Foundation (2016)
 Corvelli Fund (1996)
 George D. & Angelyn K. Coupounas Fund (1994)
 Demetrios G. C. & Kimberly A. Coupounas Fund (1996)
 Jessie B. Cox CLT - Cox Family Fund (2009)
 Jessie B. Cox Charitable Trust Fund (2008)
 Crane Fund (2012)
 Joseph Craven Family Fund (2014)
 Cregan Charitable Fund (2005)
 Crosby Family Fund (2000)
 Kate Crozier Fund (2007)
 Cuming Family Endowment Fund (1995)
 Tarrant and Laura Cutler Charitable Gift Fund (2008)
 Dainger Fund (1997)
 Dammann Boston Fund (2003)
 Lawrence B. and Elisabeth T. Damon Charitable Fund (2013)
 Daniels Fund for Aspiring Boston Youth (2014)
 Darling Family Fund (1983)
 John Da Silva Memorial Fund (1988)
 Kimberly Dawson Charitable Fund (2012)
 John H. Deknatel Family Fund (2009)
 Sarah Derby and Gary MacDonald (2007)
 Marshall and Laura Derby Charitable Fund (2007)
 Rebecca Derby and Evan Morton (2007)
 DeWolfe Family Fund (2000)
 Dibble Family Fund (2005)
 Larry DiCara Fund (2006)
 Dillon Fund (2004)
 Dintersmith-Hazard Foundation Fund (2006)
 Doe Noordzij Fund (2001)
 Eugene B. & Nina L. Doggett Charitable Fund (1999)
 Eric Dolinski & Kristen Ploetz Fund (2015)
 Marthanne Dorminy Fund (2015)
 Douglas Drane Family Fund (1984)
 Drane Center Fund (2002)
 Dryfoos Family Fund (2012)
 William J. Ducas Charitable Fund (2011)
Rebecca F. Duke Charitable Fund (2015)
 Margaret Eagle Foundation Fund (2000)
 Ecclesia Mission Fund (2012)
 Edgerley Family Fund (2012)
 Egozy Fund (2006)
 Eisenson Family Fund (2005)
 Elliott and Yu Education Fund (2012)
 Ellis Family Fund (2003)
 Elphaba Fund (2014)
 Elpus Family Fund (2015)
Elving-Carr Family Fund (2015)
 Employment Retention Fund (2004)
 Gerald Entine Family Trust Fund (2008)
 Ethics Trust Fund (1993)

Evans Family Fund (1999)
 Norris & Constance Evans Charitable Fund (1999)
 The Ewing Family Fund (2014)
 Peter and Ellen Fallon Fund (1997)
 Steven D.H. Farrell Fund (2013)
 Carol Fazio Charitable Fund (2010)
 First Principle Fund (2006)
 Fishreys Family Philanthropic Fund (1999)
 Jack Florey Fund (2004)
 Flower Hill Fund (2012)
 Foote-Richards Family Foundation (2013)
 Forshey Family Fund (1997)
 Free for All Concert Fund (2011)
 Niki & Alan Friedberg Fund (1986)
 David Frisbie Family Charitable Fund (2010)
 Fulkerson Family Fund (1998)
 Davis R. Fulkerson Fund (1999)
 Lyle W. Fulkerson Fund (1999)
 Sarah Fulkerson and Robert Le Roy Family Fund (1999)
 Fuller Trust, Inc. Fund (2009)
 Future Fund (2006)
 Gabrieli Family Fund (1997)
 Gaffney/Kames Foundation Fund (1997)
 Galilean Fund (2008)
 Ganesh Fund (2001)
 Gannon Family Charitable Fund (2003)
 Gannon Family S.U.N. Fund (2010)
 John Lowell Gardner Fund (1986)
 Garuda Fund (2007)
 Brad Gatlin Family Fund (1995)
 Gaudette Family Fund (2000)
 Gergen Family Fund (2009)
 Congressman Gerry E. Studds Fund (2006)
 Gilbert Fund (2007)
 Ginsberg/Kaplan Fund (2011)
 Giudice Family Fund (2011)
 Glassman Gale Family Fund (1985)
 John & Ethel Goldberg Fund II (1984)
 Carol R. & Avram J. Goldberg Fund (1983)
 Golden Family Fund (2000)
 Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
 The Goodman-Swindell Family Foundation (2015)
 Goodworks Fund (2002)
 Gordon Educational Fund (2001)
 Sandra & Philip Gordon Family Foundation Fund (2001)
 Gordon Place Charitable Fund (2012)
 Laurie Gould and Stephen Ansolabehere Fund (2009)
 Gravelley Springs Fund (2005)
 Green Fund (2011)
 Greenhill Family Charitable Fund (2013)
 Grogan Fund (2012)
 Patricia H. Gross Fund (1999)
 Elizabeth and Phillip Gross Family Foundation (2014)
 Grunebaum Charitable Fund (2006)
 Gualala Fund (1991)
 Guenzel-Pieters Family Fund (2008)
 Charles & Dorothy Gullickson Fund for Social Change (1998)
 Jay Habegger and Christine Nagle Fund (2004)
 Belle Linda Halpern Family Fund (2012)
 Ken and Becky Hansberry Fund (2001)
 Swift Harvey Family Fund (2014)
 J. Allan Hauter Memorial Fund (2004)
 Hebb Charitable Fund (2003)
 HEIRS Fund (1996)
 Helen C. Powell Donor Advised Fund (2015)
 Elizabeth D. Heller Fund (1987)
 Henderson Fund (1996)
The Hesperia Fund (2015)
 Hewitt Family Charitable Trust Fund (1993)
The Hidden Garden Fund (2015)
 Higgins Endowed Fund (2011)
 Higgins Family Fund (2013)
 Ann S. Higgins Fund (2001)
 Hildreth Stewart Fund (2012)
 Lucius T. Hill III and Wendy Y. Hill Fund (2000)
 Petie Hilsinger Fund (1999)
 Marc Hirschmann Foundation Fund (2002)
 Hoffman Fund (1986)
 Holberger Family Fund (1993)
 Holland Family Fund (1993)
 Gilbert H. Hood Family Fund (1980)
 Emily C. Hood Fund (2011)
 Robert Hooper Family Fund (2004)
 Hourless Fund (1997)
 Hamblin L. Hovey Institute Fund (1983)
 Hoyt Family Fund (2000)
 Hunt Fund for Children (2001)
 Income Research and Management Charitable Fund (2013)
 Interstitial Fund (2009)
Julia and Peter Johannsen Charitable Fund (2015)
 J. Jill Compassion Fund (2002)
 Mitchell & Diane Jacobs Fund (1998)

Jade Fund (2007)
 JAHSELBE Fund (2002)
 Hope and David Jeffrey Fund (2011)
 Jochkan Charitable Fund (2001)
 Stephen G. & Rosemarie Torres Johnson Family Fund (2000)
 Jonas Family Fund (2000)
 Hubie Jones Fund (2004)
 Samuel Lamar Jordan Trust Fund (2000)
 Jumping Rock Fund (2000)
 Louis and Marcia Kamentsky Donor Advised Fund (2010)
 Beton M. Kaneb Fund (1983)
 Albert J. & Diane E. Kaneb Family Fund II (1997)
 Martin & Wendy Kaplan Fund (2006)
 Kassler Family Fund (2000)
 Kaufer Family Charitable Giving Fund (2004)
 Kaye Charitable Fund (2003)
 John & Anne-Marie Keane Foundation Fund (1997)
 Keewaydin Fund (2001)
 Sabina F. Kelly Catholic Charitable Fund (1991)
 Kensington Capital Children's Fund (2002)
 Keogh Family Fund (2000)
 Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
 Kidder Smith Fund (2003)
 M. R. Kidder Charitable Fund (2004)
The Caren and Tom Kilgore Charitable Trust (2015)
 Kindling Fund (2011)
Bert King Fund (2016)
 John Thomas Kittredge and Charles R. Morehead Fund (2011)
 KJN Family Fund (1997)
 Kluchman Family Fund (1997)
 Allen and Elizabeth Kluchman Fund (1997)
 Klureza Family Fund (1997)
 Pamela Kohlberg Fund (1995)
 Stephen P. Koster Fund (1985)
 Kravitz Family Fund (1993)
 Krivickas Family Fund (2006)
 Gregory and Deborah Laham Family Charitable Fund (2011)
 Jay R. and Carol B. LaMarche Family Charitable Trust (2012)
 LandWave Fund (2009)
 Lash Family Charitable Fund (2014)
 Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)
 Leading By Example Fund (2014)
 Barbara Lee Family Foundation Fund (2004)
 Paul and Mary Lee Fund (2013)
 Roger & Clarissa Lee Family Fund (2009)
 Thomas E. & Barbara B. Leggat Fund (1986)

Jo-Ann and Martin Leinwand Fund (1986)
 Colman & Carol Levin Fund (2000)
 Levine Family Charitable Fund (2003)
 Levitt Family Fund (2000)
 Levy Family Fund (2014)
 Henry R. Lewis Family Fund (2007)
 John S. Llewellyn, Jr. Community Assistance Fund (1996)
 LMG Fund (1997)
 Marjorie L. and James M. Lober Fund (2010)

Daniels Fund for Aspiring Boston Youth

Through their Donor Advised Fund, **Belden and Pamela Daniels** are major supporters of the Success Boston College Completion Initiative, which has increased the percentage of Boston Public Schools graduates completing college from one-third to one-half. Pamela Daniels has dedicated her life to the field of education and Belden Daniels has been a pioneer of social impact investing—taking skills he learned in the private sector and applying them to support our community. Over the last two years, the Daniels have given \$300,000 to Success Boston.



LOC Fund (2009)
 Joan Locatelli Foley Memorial Fund D (1997)
 GC & JW Lodge Fund (2000)
 Longfield Family Foundation (2011)
 Loomis Sayles Charitable Fund (2007)
 Lord-Buck Fund (1996)
 Bruce Lunder Fund (1982)
 John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
 Donald J. & S. Kelley MacDonald Charitable Fund (1998)
 Magic Penny Fund (1997)
 Mahoney Family Fund (1983)
 Mann Family Fund (2010)
 Margolin/Rushford Charitable Fund (2014)
 William G. Markos Fund (1982)
 Evelyn A. Marran Fund (1983)
 The Demond and Kia Martin Foundation (2014)
 Martin Fund (1998)
 Mason-Brown Fund (2008)
 Match School Scholarship Fund (2007)
 Joan S. Mathews Charitable Fund (2014)
 Eric and Sue May Charitable Fund (2012)
 Mayel Fund (1982)
 May-McClain Charitable Gift Fund (2012)
 Austin and Tiverton McClintock Gift Fund (2014)
 Alice L. McDougall Donor Advised Fund (2015)
 Richard & Judith McGinnis Fund (1999)
 Eleanor P. McIntyre Fund (2001)
 McNeill Family Foundation (1997)
 McSweeney Family Charitable Fund (2009)
 Medical Research Fund (1992)
 Emily & Bernard H. Mehlman Fund (2002)
 Mellowes Fund (1998)
 Leila Yassa & David Mendels Fund (2000)
 Thomas M. Menino Fund for Boston (2013)
 Gilbert G. Menna Family Fund (1999)
 Barbara Putnam Metcalf & Robert Treat Paine
 Metcalf Fund (1998)
 Meyer Foundation (2006)
 Allan Meyers Fund for the Advancement of Careers
 in Disability (2000)
 Michon Family Fund (1986)
 Microsoft Unlimited Potential Fund (2005)
 Mid-Century Fund (2004)
 J. F. Middleton Family Fund (1995)
 Milford Street Fund (2014)
 Mill River Foundation Fund (2004)
 Gabrielle J. Miller Donor Advised Fund (2004)
 Anita L. Mishler Education Fund (1983)
 Moccasin Brook Fund (2000)
 The Modi Family Pass The Luck Foundation (2012)
 Molino Family Fund (2003)
 Monadnock Fund (2002)
 Mormann Family Fund (2006)
 Andy Morris and Lynne Salkin Morris Family Fund (2011)
 Robert S. Morris Advised Fund (2000)
 Sykes Moyer Fund (2005)
 Muddy Pond Trust Fund (1994)
 Munger Family Fund (2001)
 Bob & Alison Murchison Fund (2014)
 Murchison/Silvia Charitable Gift Fund (2009)
 Murphy Family Fund (2014)
 Mussafer Family Fund (2013)
 Myrtle Field Fund (2004)
 Mystic Harmony Fund (2000)
 Mystic River Watershed Environmental Fund (2011)
 Paul F. Nagle Memorial Fund (2006)
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
 Tami E. Nason & Kent A. Lage Fund (2005)
 New Beginnings/Kidder Fund (2004)
 New England Temperature Solutions (2013)
 Next Door Fund (2005)
 North Conway Institute Fund (2001)
 Chad & Lia Novotny Fund (2002)
 Kathryn Novotny Fund (2007)
 Nicholas Novotny Fund (2007)
 Novotny/Ramirez Donor Advised Fund (2002)
 Novotny/Swahnberg Fund (1997)
 Dupre-Nunnelly Charitable Gift Fund (2007)
 O'Brien Family Fund (2006)
 Vania and Barbara O'Connor Charitable Fund (2013)
 One Foot Plan (2015)
 Orchard Hill Fund (2013)
 Orpheus Fund (2002)
 Owen Marie Fund (2012)
 Morgan Palmer Charitable Fund (1982)
Palmer Family Fund (2015)
 John J. Pappenheimer Fund (1995)
 The Park Family Charitable Fund (2013)
 Parker Family Fund (2000)
 Field Parker Fund (1996)
 Partnership Fund in honor of Anna Faith Jones (2001)
 Alfred Nash Patterson Foundation for the
 Choral Arts Fund (1979)
The Pat Cooke Fund (2016)

Payne's Creek Fund (2001)
 Payson Family Fund (2000)
 Samuel Perkins and Nancy Reed Fund (1996)
 Sheila and Sara Perkins Fund (1996)
 Perkins Improvements Fund - William (1996)
 John A. Perkins, Jr. Fund (2000)
 Robert C. Perkins Fund (2000)
 Peter Fund (2000)
 Petersen Family Fund (2001)
 Philancon Fund (1990)
 Katherine A. & Fannie Phillips Fund (1997)
 Picard Family Fund (2000)
 Jamie Pierce & Rick Cresswell Fund (2002)
 Karen Odessa Piper Charitable Gift Fund (2013)
 Plimpton - Shattuck Fund (2005)
 Pluhar Family Fund (2014)
 Renata Poggioli Fund (1991)
 The Poler Family Foundation (2008)
 Pool Family Fund (1997)
 Poss-Kapor Family Fund (1996)
 Pride in Scholarship Fund (1992)
 Fred & Ruthann Prifty Fund (2001)
 Primary Care Progress Fund (2011)
 Thomas & Mary Prince Family Fund (2000)
 Joseph G. Prone Foundation (2014)
 Sue and Bernie Pucker Fund (2002)
 Donald and Frances Putnoi Charitable Fund (2006)
 Peg Pyne Fund for Handicapped Access (1985)
 Quid Nunc Fund (2001)
 Sidney R. & Esther V. Rabb Family Fund (1983)
 Barbara & Yale Rabin Fund (2002)
 Radtke Family Fund (1996)
 Otto W. Ramstad Fund (1998)
Phyllis and Jerome Lyle Rappaport Fund (2015)
 Bessye Bedrick Ravelson Fund (2003)
 Gene Record Fund (2002)
 Sara Delano Redmond Fund (1996)
 Remmer-Fox Family Fund (1995)
 Reno Family Charitable Foundation (1998)
 Edward S. Reynolds Memorial Fund (1984)
 Rhyme and Reason Family Fund (2000)
 Jonathan Rizzo Memorial Foundation Fund (2001)
 Roberts Family Fund (1995)
 Roberts-Belove Fund (2004)
 Robynhood Thanksgiving Fund (2002)
Roscoe Trimmier Fund (2015)
 Rosedune Fund (1970)
 Rosen Family Fund (2008)
 Lindsey A. Rosen Fund (2011)
 Daniel and Brooke Roth Charitable Gift Fund (2007)
 Rothman Charitable Fund (2014)
 Rotman-Attardo Family Fund (2005)
 Rust Bowl Fund (1987)
 Ronni Sachs Kotler Family Fund (2007)
 Saffron Circle Fund (2006)
 David Salten Fund (2007)
 Risha C. and Paul A. Samuelson Fund (1982)
 Samuelson Family Gift Fund (2012)
 Sands Family Fund (2011)
 Schawbel Family Fund (1995)
 Margaret M. Schmidt and Kenneth J. Danila Fund (2004)
 Schott Fund (1999)
 Schumann Family Fund (2005)
 Schwinn Family Charitable Foundation (2011)
 Charles S. and Zena A. Scimeca Charitable Fund (2004)
 September Fund (2000)
 A Servant's Heart (2014)
 Norman and Maryellen Sullivan Shachoy Fund (1997)
 Shames/Egasti Fund (1991)
 Shapiro/Fleishman Fund (1999)
 Douglas Boyd Sharpe Donor Advised Fund (2006)
 Shawkemo Fund (2000)
 SheGives Fund (2014)
 Bob and Jean Sheridan Family Fund (2012)
 Sherman Family Foundation Fund (2005)
 Jon Shevell Cancer Fund (2010)
 Jon Shevell Children's Fund (2010)
 Jon Shevell Education Fund (2010)
 William U. & J.W. Shipley Fund (2001)
 Shoe Box Foundation Fund (2004)
 Jean Karpas Siegel Fund (1994)
 Silvia-Chandley Fund (2014)
 John and Susan Simon Boston Foundation Fund (2007)
 Ellen L. Simons Fund (1997)
 Sixty-Nine Roses Charitable Foundation (2011)
 Skylight Fund (2000)
 Fay Slover Fund (2010)
 Ellin Smalley Fund (1987)
 Austin & Susan Smith Fund (1999)
 Clark R. and Trina H. Smith Family Fund (1990)
 J. Alper Smith Fund (1996)
 Nancy and George Soule Family Fund (1997)
 Sparky Foundation Fund (2003)
 Spector Fund (2001)

Spencer Family Charitable Fund (2014)
 David F. Squire Family Fund (1997)
 State Street Fund (2012)
 Staufienbiel Aley Fund (2009)
 Harvey & Shirley Stein Fund (1999)
 Stewart Fund (2006)
 Stith Hope Fund (2014)
 Tracy Stewart Fund (2009)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 James M. and Cathleen D. Stone Foundation (1995)
 Charles Sugnet Fund (1998)
 Joshua Sugnet Fund (1998)
 Suhrbier Family Fund (2005)
 Nancy L. Sullivan Fund (1989)
 Diane Sullivan-Villano Fund (1998)
 Sunrise Fund (1993)
 Susan F. Schaeffer Fund (2013)
 Sylvan Fund (1985)
 TechFoundation Fund (2002)
 Tempero Family Fund (2002)
 Marc Thompson & Maureen Conway Family Fund (2008)
 Thomsen Family Fund (2000)
 Susan and Michael Thonis Fund (2005)
 TK Foundation (2014)
 Scott and Jennifer Tobin Charitable Fund (2004)
Toms Family Fund (2015)
 Topol Family Fund (1991)
 Trefler Fund (1997)
 Elizabeth Trichel Joyce Family Fund (2007)
 The Tuukka Rask Foundation (2013)
 Tye Charitable Fund (2006)
 Nancy J. Vickers Fund (2006)
 Violet Iris Fund (2014)
 Vizzini Fund (1997)
 Ann & Robert von der Lippe Fund (1997)
 JH & EV Wade Fund (1990)
 James and Margaret Wade Fund (1997)
Linda M. Walczak Children's Literacy Fund (2015)
 Walker Fund (1998)
 The Walter/Capone Fund (2010)
 Ruth and Henry Walter Fund I, II, III (2010)
 J. H. Walton Family Fund (1986)
 Mitchell and Barbara Freedman Wand Charitable Fund (2013)
 Warner Charitable Gift Fund (2000)
 Anita Barker Weeks Charitable Gift Fund (2011)
 Gordon Weil, Jr. Fund (2010)

Weiss Charitable Fund (2004)
 Wellesley Hills Congregational Church Outreach Fund (2007)
 Janet White Memorial Scholarship Fund (2004)
 Whitehead - Sayare Fund (2008)
 Guy and Maggie Wickwire Fund (1989)
 Benjamin J. Williams, Jr. Fund (1986)
 Hope A. Williams Fund (1986)
 Natica R. Williams Fund (1986)
 Ralph B. & Margaret C. Williams Fund (1985)
 Ralph B. Williams, II Fund (1986)
Williamson Charitable Fund (2016)
The Windy West Fund (2016)
 Winkler Family Foundation Fund (2001)
Winn Family Charitable Fund (2016)
 Wesley L. Winship Fund (1998)
 Winsor Foundation Fund (1989)
 Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 Michael N. Wood Fund (1996)
 Zabin Charitable Fund (2001)
 Emily Zofnass Fund (1998)
 T. Zouikin Charitable Fund (2003)
 Zug Family Fund (2008)

Note: In addition to the 22 new Donor Advised Funds listed in bold italics above, there were three new anonymous Donor Advised Funds in fiscal year 2016.

SUPPORT ORGANIZATIONS

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

DESIGNATED FUNDS

Designated Funds have been established by donors to support the organizations or issues they care about most.

Through these funds, many nonprofit institutions receive crucial annual support.

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

1819 Greek Revival Renewal Fund (2011)

ACCESS Education Fund (1985)

Fund for Adult Literacy (1985)

Rae and Aaron Alberts Foundation Fund (2002)

Rae and Aaron Alberts Foundation Fund II (2005)

Frank E. Anderson Fund (1975)

Chip & Barbara Angle Fund (2014)

Area IV Fund (2014)

Artists Foundation Endowment Fund (1984)

Red Auerbach Youth Foundation Fund (1983)

Lilian G. Bates Fund (1951)

Grace & Floyd Lee Bell Fund (1987)

BLS Alumni of Color Scholarship Fund (2016)

Boston Ballet-E. Virginia Williams Endowment Fund (1983)

Boston Bar Association Endowment Fund (1983)

Boston Baroque Fund (2003)

Boston Schoolyard Funders Collaborative (1995)

Richard L. Bowser Fund (1985)

BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)

BPE/Support for Early Educational Development Fund (1985)

Herbert Brandshaft Scholarship Fund (2007)

Annie L. Breckenridge Trust Fund (2000)

Brookline Youth Concerts Fund (1995)

Michael and Stella Buonsanto Charitable Fund (2013)

Charles T. Burke Fund for the Watertown Boys and Girls Club (1994)

Charles T. Burke Fund for the Watertown Free Public Library (1994)

Agnes T. Carruth Fund (1983)

James F. Casey Fund (1949)

Dr. Walter Channing Memorial Fund (1933)

Charles River Parklands Stewardship Fund (2002)

Charter Schools Prize Fund (2013)

Philip P. Chase Fund (1955)

Julia Child Fund (1979)

Ellen D. Cholerton Fund (1969)

Ernest & Vera Clivio Charitable Memorial Fund (1981)

Committee to Light Commonwealth Avenue Fund (2011)

Almon B. Cook-Relief Fund (2001)

Allyn Cox Fund for Essex County Greenbelt (1994)

Thomas G. Curtin - Bobby Kargula Nanae Fund (2009)

Dedham Choral Society Endowment Fund (1991)

Harry Ellis Dickson Youth Concerts Fund (1982)

Joy & George Dryfoos Charitable Fund (2012)

Duggan Charity Fund (1998)

East Boston Social Centers, Inc. Fund (1996)

Douglas A. Eaton Memorial Fund (1962)

William V. Ellis Fund for Our Lady of Good Voyage Carillon (2011)

Ruby C. Emerson Fund (1966)

English High School Class of 1934 Award Fund (1994)

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

Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008)

Philip M. Fagan Family Fund (1971)

Paul R. & Jacqueline D. Fehrenbach Family Fund (1999)

Benjamin M. Feinberg Fund (1962)

Arthur Fiedler Esplanade Concerts Fund (1980)

Mark Hayden Fineman Chess Tournament Fund (1985)

Food and Fuel Fund (2008)

Felix Fox Memorial Fund (1974)

Americo Francisco Fund, Estate & Realty/Charitable Trusts (1998)

Peter Marshall French Memorial Fund (1976)

Gaywest Farm Fund (1994)

Agnes A. Gidley Memorial Fund (2013)

John & Ethel Goldberg Fund I (1984)

John & Ethel Goldberg Fund IV (1984)

John & Ethel Goldberg Fund V (1984)

John & Ethel Goldberg Fund VI (1984)

Bessie P. Goldsmith Fund (1994)

Barbara W. & Frank B. Gopen Fund (1978)

Muriel & Otto Snowden Endowment

Fund Juan David Lozano (*below*) is a coach for the Success Boston College Completion Initiative (*see article on page 14*), working through Freedom House—one of the Initiative’s nonprofit partners. Every year, Freedom House receives support from the Muriel & Otto Snowden Endowment Fund, named for the founders of Freedom House. Today, this Roxbury-based organization is focused on educating the young people of Boston, helping them to graduate from high school and coaching them so that they can go on to complete a college degree.



Walter W. Gove Fund (1972)
Elizabeth Grant Fund (1980)
Rosario Fajardo Hagan Fund (1991)
Haiti Development Institute Fund (2015)
Patricia Jellinek Hallowell Fund (1992)
Hastings-Plummer Fund (1940)
Jorge N. Hernandez Fund (1987)
Gertrude Hooper Fund (1996)
Madeleine C. Huiginn Fund (1993)
Blanche Hyslop Fund (1982)
Orchestra of Indian Hill Music Director Fund (2002)
James W. & Margaret A. Ingraham Charitable Fund (1992)
Ella Jackson Artists and Scholars Fund (1982)
Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2013)
Patrick F. Jones, Jr. Endowment Fund (1981)
Donaldson F. Jones Fund (1999)
William & Sean Kelley Scholarship Fund (2010)
John F. Kennedy Library Foundation Endowment Fund (1984)
Demetra Kenneth-Brown Fund (1920)
Alice V. Kidder Fund (2001)
Robert D. and Sally G. King Fund (1999)
Kit Clark Senior Services Fund (2000)
Gerald V. Levreault & Claire H. Levreault Fund (2001)
Lawrence B. Lewis Fund (1957)
Ralph Lowell Fund (1982)
Gertrude F. & Henry L. Maurer Fund (1998)
John S. McCann Fund (2000)
MHEAC Fund for ACCESS (1986)
Dorothy Morse Endowment Fund (1999)
Harry D. Neary Fund (1950)
Neighborhood Preservation Initiative Fund (1995)
New England Aquarium Education Fund (1983)
New England Forestry Foundation Fund (1996)
New England Women’s Club Fund (2001)
Roger L. Nichols Internship Program Fund (1984)
Lottie S. Page Fund (1984)
Robert Treat Paine Historical Trust Fund (1990)
William Morgan Palmer Fund (1977)
Harold Peabody Memorial Fund (1992)
Permanent Fund for Vocational Education (1979)
John M. Pero Scholarship Fund (2014)

Charles & Cornelia Pfaff Fund (1964)
 Henry L. Pierce Fund (1958)
 Emma K. & Richard Pigeon Fund (1955)
 The Plimpton-Poorvu Design Prize Fund (2015)
 Primary Care Fellowship Program Fund (1983)
 Public School Management Research Fund (2002)
 Charlotte F. & Irving W. Rabb Family Fund (1984)
 Reading Visiting Nurse Association Fund (1976)
 Rogers Fund of the Riverside Cemetery (1997)
 Henry A. Root Fund (1926)
 Rose Fund (1981)
 Fund for Rosie's Place (1984)
 Dr. Jordan S. Ruboy Charitable Fund (1998)
 Sheep Pasture Fund (1994)
 Bessie H. Short Fund (1997)
 Dana P. & Maude E. Simpson Memorial Fund (1998)
 Muriel & Otto Snowden Endowment Fund (1984)
 Social Law Library Endowment Fund (1982)
 Michael Spock Community Service Fund (1980)
 Alison L. Stevens Fund (1976)
 Eva and William Stillman Scholarship Fund (2013)
 Miriam & Sidney Stoneman Fund (1984)
 Students of Selma Fund (2015)
 Surfmen's Trust Fund (1977)
 The Tarrant Cutler Family Science & Animal Fund (2014)
 Agnes & Lewis Taylor Fund (1962)
 Frank B. Thayer Fund (1976)
 Pauline Toumpouras Fund (2010)
 United Way Millennium Fund for Children and Families (1999)
 Ansin Fund (2002)
 Chelsea Boys and Girls Club Fund (2000)
 Connell Family Fund (2000)
 Carol R. & Avram J. Goldberg Fund (2002)
 Lawrence & Beth Greenberg Fund (2000)
 Darlene & Jerry Jordan Fund for Children (2000)
 Margarete McNeice Fund (2001)
 David R. and Muriel K. Pokross Fund (2003)
 Schoen Family Fund (1999)
 Tom & Nancy Shepherd Fund (2001)
 State Street Foundation Fund (2000)
 J. C. Tempel Fund for Children (2001)
 Vinik Family Fund (2000)
 Peter and Pamela Voss Fund (2000)

David J. Tuttle, Jr. ALS (2016)
David J. Tuttle, Jr. MIT (2016)
 Robert E. Wallace Memorial Fund of the Urban League (1992)
 Inez Washabaugh Ward, PNP, Scholarship Fund (2011)
 Bradford Washburn Fund (1980)
 Bill and Estelle Watters Fund (1997)
 Jane Wengren Fund (1979)
 Stetson Whitcher Fund (1986)
 May J. Wikstrom Fund (1998)
 Rudolph & Sara Wyner Prize Fund (1985)

SCHOLARSHIP FUNDS

Harry Ankeles Scholarship Fund (1992)
 Blair Family AvalonBay College Scholarship (2012)
George C. Brackett STEM Scholarship (2016)
 Francis J. Bresnahan Educational Scholarship Fund (1986)
 Alex Castoldi Memorial Scholarship Fund (1981)
 John J. Cattaneo III Fund (1984)
 Paula Marie Danforth Memorial Scholarship Fund (1990)
 deVille Fund (1994)
 Eagle Bank-Frank E. Woodward Scholarship Fund (1985)
 Americo J. Francisco Scholarship Fund (1993)
 Albert Francis Gilmartin Memorial Scholarship Fund (2005)
 Robert L. Gould Fund (1987)
 Greatrex Scholarship Fund (1988)
 Charles Hammond Fund - Hanover (1972)
 Charles Hammond Fund - Springfield (1972)
 Janey Fund Scholarship Program (1999)
 Nixon Peabody Scholarship Program in Recognition of
 Retired Managing Partners Robert S. Cummings,
 Nestor M. Nicholas and Harry P. Trueheart, III (1997)
 Stephen D. Paine Scholarship Fund (1999)
 Francis P. Sears Scholarship Fund (1973)
 Paul & Eleanor Young Fund (1988)
 Youth Business Institute Scholarship (2014)

Becoming a Donor *Don't just give. Solve.*

The Boston Foundation welcomes all of the individuals, families, businesses and entrepreneurs who come to us to do their charitable giving because, like them, we measure philanthropy by impact created, not just dollars given.

SOLVING the Problems You Care About

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

OFFERING Donor Advised Funds and Private Foundation Alternatives

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

MAXIMIZING Your Giving with The Philanthropic Initiative

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

SUPPORTING Systemic Change Through Civic Leadership

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

supported by the Civic Leadership Fund at the Boston Foundation, which is contributed to by hundreds of donors every year.

HELPING You Shape Your Legacy Through the Permanent Fund for Boston

As the Boston Foundation's endowment, the Permanent Fund for Boston provides the resources the Foundation needs to respond nimbly to the most pressing issues confronting Greater Boston. We can help you plan a lasting legacy by creating a Named Fund or Field of Interest Fund as part of the Permanent Fund for Boston—and help you plan the best way to incorporate this kind of legacy giving into your estate planning.

Getting Started

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

For more information about becoming a donor or making a planned or legacy gift to the Boston Foundation, call or email us at 617-338-1700 or dirdev@tbf.org. We invite you to visit our special website focused on our donors at www.tbf.org/solve.



Applying for a Grant

Vision 2020



FUNDING Opportunities

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

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

HEALTH & WELLNESS

JOBS & ECONOMIC DEVELOPMENT

NEIGHBORHOODS & HOUSING

ARTS & CULTURE

CROSSCUTTING Strategies

The Boston Foundation also has two Crosscutting Strategies:

The **Nonprofit Effectiveness** strategy aims to strengthen the Massachusetts nonprofit sector and enhance the impact of the Foundation's grantees. Our work in this area supports and promotes effective and sustainable nonprofits by focusing on three core competencies: Leadership, Capacity and Resources. This strategy also includes the Giving Common, an open online database with more than 1,000 nonprofit profiles connecting donors, funders and other stakeholders. We invite you to visit www.givingcommon.org.

The **Grassroots** strategy is set up to respond quickly to community needs, with grants from the Action Fund that range from \$200 to \$10,000 to grassroots organizations that are 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

Open Door Grants support organizations that may not be directly aligned with the approaches pursued under the Five Impact Areas. Both new and existing nonprofit organizations in Greater Boston can apply for these grants to support efforts that meet existing needs, including organizational capacity building. These grants also support the testing of new ideas and innovations that address the most critical challenges facing our community.

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

2016 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, 2016

| | 1 YEAR | 3 YEARS | 5 YEARS | 10 YEARS |
|--|--------|---------|---------|----------|
| <i>Fund for 21st Century Investment Options:</i> | | | | |
| Balanced Plus Pool | -1.5% | 5.2% | 5.2% | 4.8% |
| Balanced Pool (established 2/1/11) | -1.1% | 4.1% | 4.5% | n/a |
| Short-Term Pool (established 1/1/10) | 0.27% | 0.13% | 0.12% | n/a |
| <i>Benchmarks:</i> | | | | |
| 65% MSCI A.C. World/35% Citigroup World Bond Index | 1.6% | 5.0% | 4.1% | 4.6% |
| MSCI All Country World Stock Index | -3.7% | 6.0% | 5.4% | 4.3% |
| S & P 500 Stock Index | 4.0% | 11.7% | 12.1% | 7.4% |
| Citigroup World Bond Index | 11.3% | 2.6% | 1.2% | 4.2% |

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

The Spending Policy

By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2016 spending rate was 6.4% for its permanently restricted discretionary funds. For Fiscal Year 2017, the Board again approved a spending rate of 6.4% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the 6.4% spending rate applied to the current market value. The approved spending policy rate for designated endowment funds is 5.0% for Fiscal Year 2017.

The Philanthropic Initiative

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2015, the operations of TPI added \$2.5 million of service fee income to the operations of the Foundation.

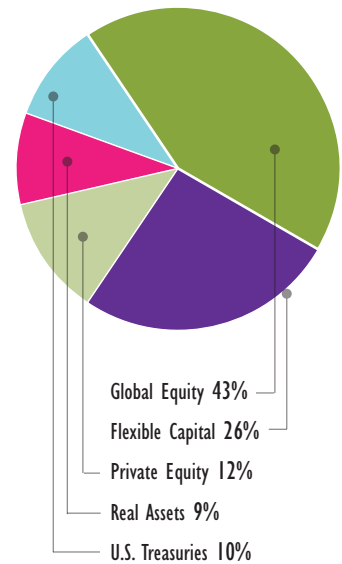
Financial Analysis

Total assets of the Boston Foundation decreased slightly from \$992 million to \$968 million at June 30, 2016. For the year, net investment returns for the Balanced Plus Pool were (1.5)% during a period in which the global stock market was down (3.7)%. During this same period, the Foundation received \$107 million in contributions and paid \$100 million in grants. Expenditures for program support and operating expenses totaled \$21.2 million, thus explaining the change in total assets.

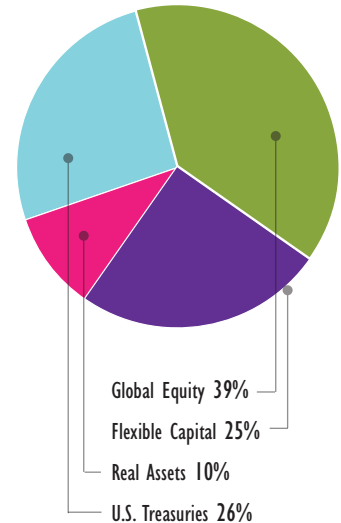
Audited Financial Statements

The Foundation’s financial statements are prepared under policies and procedures overseen by the Foundation’s independent Audit Committee and the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown on page 58. The audited statements and Form 990 are available on our website at www.tbf.org.

ASSET ALLOCATION
Balanced Plus Pool



Balanced Pool



2016 and 2015 Summary Financial Statements

(in thousands)

| | 2016 | 2015 |
|--|------------|------------|
| Assets: | | |
| Investments | \$ 927,453 | \$ 958,273 |
| Cash Equivalents | 12,467 | 24,765 |
| U.S. Treasury Notes | 16,165 | 0 |
| Receivables & Other | 11,653 | 9,215 |
| Total Assets | \$ 967,738 | \$ 992,253 |
| Liabilities & Net Assets: | | |
| Accounts Payable and Other Liabilities | \$ 5,876 | \$ 5,894 |
| Grants Payable | 1,220 | 668 |
| Net Assets | 960,642 | 985,691 |
| Total Liabilities & Net Assets | \$ 967,738 | \$ 992,253 |
| Revenues: | | |
| Contributions | \$ 107,169 | \$ 122,531 |
| Service Fee Income | 1,582 | 1,896 |
| Net Investment Return | (10,664) | 20,589 |
| Total Revenues | 98,087 | 145,016 |
| Grants & Expenses: | | |
| Grants | 101,862 | 127,264 |
| Change in Split Interest Trusts | 68 | 197 |
| Program Support | 5,742 | 4,954 |
| Operating Expenses | 15,464 | 14,851 |
| Total Grants & Expenses | 123,136 | 147,266 |
| Change in Net Assets | (25,049) | (2,250) |
| Net Assets Beginning of Year | 985,691 | 987,941 |
| Net Assets End of Year | \$ 960,642 | \$ 985,691 |

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.



Rosalin Acosta
Managing Director and Senior Vice President
 Enterprise Investment Advisors



Zamawa Arenas
Principal
 Argus



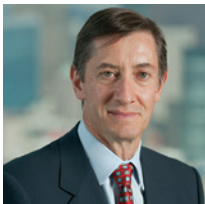
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Paul W. Lee
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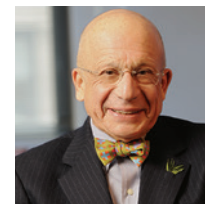
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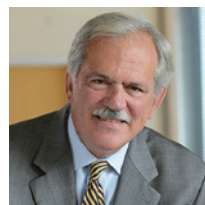
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Judelys Gonzalez, *Senior Fund Administration Coordinator*

Romuald Noelsaint, *Accounting Assistant*

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