They Are The Philanthropists, The Visionaries And The Social Entrepreneurs.

Some Of Them Are All Three.

They Look At Problems And See Nothing But Opportunities.

They Never Walk Away From A Challenge And They Are Never Satisfied With The Status Quo.

They Are The Healers, The Educators, The Community Leaders.

They Are The Change Makers.
“...The people who are crazy enough to think they can change the world are the ones who do.”

Jack Kerouac
Novelist and poet born in 1922 in Lowell, Massachusetts
Nonnie and Rick Burnes
Read about how they are changing the very definition of “family philanthropy” on page 12

Elaine Ng
See page 14 to learn about how she is working with other community leaders to change Chinatown’s future

Dawdu Mahama-Amantanah and Gerald Chertavian
Learn how they are changing the ways we can close the opportunity divide on page 16

Dr. Barry Zuckerman (front) with Drs. Dan Parry and Natalie Stavas
See page 18 to learn how they are changing the focus from “health care” to “health” for our state’s children

Eos Foundation’s Kate Deyst
Read about how one foundation wants to change the odds for hungry children in Massachusetts on page 20

Dr. Roger Harris
See page 22 to learn how he is changing the lives of hundreds of students through a remarkable charter school

(From left) Bill Nigreen, Bill Speciale, Grace Fey and Jon Steffensen
Learn how they want to change our city’s future by building the Permanent Fund for Boston on page 24
We at the Boston Foundation are extremely fortunate to know hundreds of remarkable “change makers.” From our donors and grantees to civic and grassroots leaders, we are honored to work side-by-side with those who are writing the script for Greater Boston’s future.

Two of the change makers featured in this report are community leaders who retired from the Foundation’s board this year: Rick Burnes, who had a tremendous impact on this organization over 10 years of service; and Gerald Chertavian, the founder of Year Up, one of the most innovative nonprofit organizations launched in Boston in recent decades.

Yet another article features Grace Fey, a current member of our board who is leading the campaign to strengthen the Foundation’s Permanent Fund for Boston. That crucial fund provides the flexible resources we need to make grants in Greater Boston every year and we thank her for her leadership in this important effort.

Strengthening philanthropy in general was a major theme during 2012. We are very proud that this year we launched the Equality Fund, a permanent fund with the mission of providing support to advance the equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer individuals and their families. It’s the first fund of its kind in Greater Boston—and the committee that guides that fund is co-chaired by Catherine D’Amato, another member of our board.

We also merged with The Philanthropic Initiative, expanding mightily our capacity to advise our donors about strategic giving here and abroad. And we launched a new philanthropic resource for this community called the Giving Common, a tremendous online giving vehicle designed to facilitate contributions to nonprofits throughout Massachusetts.

Finally, we want to thank all of our donors, because they make all of our work possible. By conducting their giving through Donor Advised Funds at the Boston Foundation, they strengthen the entire organization. By co-investing in nonprofits with us, they increase the impact of our grantmaking. By contributing annually to the Civic Leadership Fund, they empower the Foundation and its many partners to make profound and positive change. And by planning to leave a legacy to our community through the Permanent Fund for Boston, they are strengthening Greater Boston’s community foundation far into the future.
The Change Makers

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55 Support Organizations and Other Special Funds
Record-breaking grants from the Foundation and its donors total $88 million—some $34 million more than a decade ago.

**The Philanthropic Initiative (TPI)** merges with the Boston Foundation, offering a **new level of expertise** for donors.

The Measure of Poverty, a Boston Indicators Project report, draws attention to deepening poverty in the city’s neighborhoods.

$3 million is raised to help residents through the winter and **5,000 coats are distributed to children** in a partnership with the Mayor and Operation Warm.

The Equality Fund, the first of its kind in Boston, is launched to provide support for the **equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer** individuals and their families.

Six artists receive $15,000 fellowships from the Brother Thomas Fund at the Foundation.

Municipal Health Care Reform, supported by the Foundation, saves close to **$180 million** for cities and towns.

Boston Celtics star **Paul Pierce** and the Boston Foundation challenge Massachusetts youth to **increase their daily physical activity** in 2012.

The Foundation **leverages $26 Million in Funds** through special initiatives, collaboratives and co-funding from our donors.
The Giving Common is launched and more than 500 Massachusetts nonprofits participate in the Giving Common Challenge, raising more than $1 million.

City of Ideas, the 2012 Boston Indicators Report, is released with a call for reinventing Boston’s innovation economy.

A major report and the Coalition FOR Community Colleges help to bring about sweeping changes to the state’s community college system.

The Healthy People/Healthy Economy Coalition releases its second report card, showing some progress, but much room for improvement.

The Foundation celebrates 10 Years of the Civic Leadership Fund, which has raised more than $9.5 million.

CHEERS for CHAMPS celebrates at Fenway Park, with 2,000 children, athletes and coaches coming together to kick off summer CHAMPS programming.

Out of the Blue grants are celebrated with 35 nonprofits receiving unsolicited grants over the last decade.

The Foundation receives an award from the U.S. HUD Secretary for the Neighborhood Stabilization Loan Fund, which has financed 468 housing units.

My Summer in the City makes more than $500,000 in grants to keep parks open and provide more than 400 summer jobs to inner-city youth.
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The Boston Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community’s interests and needs. All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.

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About the Boston Foundation

All of the work of the Boston Foundation is guided by two strategic goals that reflect a deep commitment to strengthening our community:

Greater Boston Residents Are Successful and Thriving.
Greater Boston Communities Are Vibrant, Safe and Affordable.

Giving
Enhancing the Philanthropic Impact of Our Donors

The Boston Foundation combines our donors’ aspirations and passion for giving with our deep understanding of the vital issues facing our community.

Through Donor Advised Funds, donors can make grants anywhere in the United States or abroad. These convenient funds operate much like a private foundation, without the administrative or payout burdens.

The Foundation also offers funds that allow donors to invest in the future of Greater Boston and the issues and organizations that have a profound impact on their lives—through gifts or bequests to the Permanent Fund for Boston.

And this year, the Boston Foundation merged with The Philanthropic Initiative (TPI), adding to our capacity to advise donors about how to engage in strategic and effective philanthropy here and around the world.

Supporting Nonprofits
Strengthening the Effectiveness of the Entire Sector

Through our grantmaking and special initiatives in Greater Boston, the Boston Foundation supports nonprofits across a wide range of issues, guided by our focus on people and place with a strategic focus on: Education to Career, Health and Wellness, Jobs and Housing, Community Safety and Civic and Cultural Vibrancy.

The Foundation also works to strengthen nonprofits and leaders through a range of work designed to enhance the long-term vitality of the Massachusetts nonprofit sector:

▲ Building the effectiveness of organizations and leaders through the Vision Fund and the Institute for Nonprofit Management and Leadership at Boston University

▲ Encouraging collaboration through the Catalyst Fund for Nonprofits and Collaborate Boston

▲ Strengthening the entire sector through research and advocacy
Having an Impact

Civic Leadership That is Working

The Boston Foundation is a major civic leader for Greater Boston and our region—with crucial support from the Civic Leadership Fund at the Boston Foundation, which raised more than $1.4 million this year.

We use a formula that is working for K-12 and higher education, workforce development, health, housing, cultural facilities, municipal finance and other critical areas:

▲ Cutting Edge Research
▲ Major Forums and Convenings
▲ Strategic, Proactive Grantmaking
▲ Task Forces and Coalitions
▲ Communications and Media
▲ Deep Public Policy Work

Through our Understanding Boston series, we identify the challenges facing our city and region, commission fresh research and share information through a series of forums that are attended by thousands of people every year.

The Foundation is also home to the Boston Indicators Project, which provides comprehensive information and analysis about every aspect of life in Greater Boston and our region through a cutting edge website and biennial bold reports.

Visit Our New Websites

For an in-depth look at all of our work, please visit the Boston Foundation’s new website at tbf.org. We also invite you to visit bostonindicators.org, which offers unprecedented information and analysis about the greatest opportunities and challenges our city and region face. And go to givingcommon.org, your place for informed giving in Massachusetts.
“The future does not belong to those who are content with today.”

Robert F. Kennedy
The people you will read about in this annual report most certainly are not “content with today.” In fact, there seems to be something in the very DNA of those who live and work in Greater Boston that makes them restless when it comes to today and highly ambitious when they think about the future.

Here you will read about an entire family of Boston Foundation donors who are giving far more than dollars, a group of strategic philanthropists taking on childhood hunger in Massachusetts, a social entrepreneur who founded an organization that is helping to close the “opportunity divide” and a young man who embodies that organization’s success.

Other stories are about a group of pediatricians who are just as concerned about “health” as they are about “health care,” an educator who has embraced the charter school model and run with it—as he did with a football in his youth—and a woman who was born in Chinatown and has returned to that vibrant neighborhood to help build its future.

Finally, you will learn about a group of dedicated donors and advisors who are helping the Boston Foundation strengthen the Permanent Fund for Boston, Greater Boston’s endowment fund. That irreplaceable resource has had an impact on all of the people profiled in these pages and countless others. We thank this determined group and we invite you to consider joining us, so that together we can be there to support the change makers of tomorrow.
Butler's Hole is a magical spot where Nantucket Sound meets the Atlantic Ocean. It holds a special place in the hearts of the Burnes family and so when Nonnie and Rick Burnes decided to open a Donor Advised Fund at the Boston Foundation in 1994, they called it the Butler’s Hole Fund.

Rick has been a venture capitalist since the early days of his career, co-founding Charles River Ventures in 1970. Nonnie is a Senior University Fellow at the Northeastern’s School of Public Policy & Urban Affairs. From 2007 to 2009, she served as Massachusetts Commissioner of Insurance and prior to that was a Superior Court Judge. Both believe in the kind of philanthropy that involves far more than donating funds.

“I think donors should take responsibility for making sure that the dollars they invest are effectively spent,” explains Rick. “One way to do that is to serve on the boards of nonprofits.”

With a passion for the importance of teaching technology, he has chaired the board of Boston’s Museum of Science and served on the Boston Foundation’s board. Nonnie currently chairs the board of Planned Parenthood of Massachusetts at a time when that organization’s work is more important than ever.

“We have always encouraged the entire family to contribute to the causes and nonprofits they believe in,” says Nonnie, “but we also hoped they would understand the importance of giving time and leadership.” Rick adds, “I guess it worked: They were all on boards of nonprofits by the time they were in their thirties.”

All three of their adult children also have their own Donor Advised Funds at the Foundation, all with the words “Butler’s Hole” in the fund names. “They represent the next generation of philanthropists,” says Nonnie, “and we’re proud of the thoughtful way they are taking on that role.”
Elaine Ng calls her beginnings a “common Chinese immigrant story.” Her father came to Boston from China at the age of 16 and was a restaurant worker before he learned English, joined the Army and eventually found a calling in civil rights work. When he had established himself, he traveled to Hong Kong and returned with his wife, who was just 17 and pregnant with Elaine. Her mother became a garment worker and the family lived in Chinatown until Elaine was nine years old, then moved to Roslindale because her mother was concerned about gang activity in Chinatown.

“Living in Roslindale had its own challenges,” she says. “No one looked like us! We were only the second Asian family in that neighborhood. And it was the ‘70s and busing was in full force.” She vividly remembers the rocks thrown at her on her way to school.

“Always,” she adds, “my identity was intertwined with Chinatown.” And so she returned. After graduating from UMass Boston, she eventually took a job developing youth programming at the Boston Chinatown Neighborhood Center. That was almost 20 years ago. For the last six years, she has served as Executive Director and guided the Center through the move a new building with a robust menu of programs for children and families.

Today, she is overseeing a major expansion of the Center into Quincy, where one-quarter of the population is Asian. “Because of the lack of affordable housing in Chinatown, the Asian demography is shifting,” she explains. “We decided that if we were to meet our mission, we should go to them instead of having them travel to us.”

She is also excited to be collaborating with the other leaders in the neighborhood to launch a cultural center and a library. “Organizations in Chinatown have come together,” she says, “to create something that will bring a new sense of vibrancy to this community for years to come.”
At a State House rally on April 5th of this year, Dawdu Mahama-Amantanah stood before a crowd of people who were there to support the Coalition FOR Community Colleges—a group made up of more than 60 organizations from across Massachusetts intent on strengthening the state’s community college system. He spoke about what he called “the transfer wars,” wherein the credits he earned at a community college were worthless at another state college. He also described the quality of the education he received.

“I quickly learned that I was attending classes without enough books and very little guidance,” he said. “I worked so hard and spent so much money and came away with nothing. I know that Massachusetts has a skills gap. I’m here to say there is also an opportunity gap.”

After leaving college for financial reasons and working in a dead-end job, Dawdu heard about Year Up, an organization that gives urban young adults the skills, experience and support they need to qualify for professional careers and pursue higher education. Having completed his “year up,” Dawdu has a full-time position at State Street Bank and is working toward a college degree at UMass Boston. Year Up was launched in Boston in 2000 by Gerald Chertavian, a Boston Foundation donor and former board member, with early grants from the Boston Foundation and other funders inspired by his vision. Dedicated to closing what he calls the “opportunity divide,” Year Up has more than 3,400 alumni nationwide and serves 1,500 students per year in 11 cities—working with hundreds of corporate partners that provide internships for the students.

Year Up is a member of the Coalition FOR Community Colleges, which was convened by the Boston Foundation early this year and led to sweeping changes in the state’s community college system that were signed into law by Governor Deval Patrick in July. The changes are designed to align community colleges with the workforce needs of the state. Massachusetts has a “skills gap” that has left some 100,000 positions unfilled when hundreds of thousands of people are unemployed, but unqualified for the open jobs.

“We desperately need a knowledge-based workforce in this country to remain competitive in the world,” says Gerald, “and community colleges are pivotal to that goal.” In fact, Year Up is working with community colleges in Baltimore and Miami to establish an on-campus Personal Training Corps program (PTC), based on the ROTC model. “We’re providing internships with businesses and support services that it would be hard for community colleges to offer,” he explains.

“I would have taken advantage of an opportunity like that,” says Dawdu. “I constantly think about everyone who hasn’t had the opportunities I’ve had through Year Up.” He adds, “I consider myself part of a movement to make America see the potential in all young people.”
Dr. Barry Zuckerman, Chief of Pediatrics at Boston Medical Center (front), is nationally known for his lifelong, fierce advocacy on behalf of children’s health. Today, he is taking on what he considers to be the number one risk to children’s health: obesity and the sugar-sweetened beverages and juices that are the largest source of excess calories in children’s diets. There is a strong association between obesity and the increase in Type 2 diabetes and other chronic illnesses.

“When I started to practice medicine, I would see one obese child every two or three days,” he says. “Now we see three or four obese children a day and another two or three who are overweight. It’s an epidemic.” Making the point that sugar-sweetened beverages have no nutritional value, he adds, “The only time I would want to see children drink these beverages is if they were the victims of a famine and there was no other source of calories.”

Dr. Zuckerman is joined in his efforts by the Healthy People/Healthy Economy Coalition, led by the Boston Foundation and NEHI, which has filed legislation that would eliminate the Massachusetts sales tax exemption on soda—in the process raising upwards of $50 million that could be directed toward public health initiatives.

Drs. Daniel Parry and Natalie Stavas, resident pediatricians at Boston Medical Center and Children’s Hospital, are spearheading a campaign to ask pediatricians across the state to distribute “prescriptions” emphasizing the dangers of sugar-sweetened beverages. The cards bear an image of soda bottles crossed with the universal symbol for “no.”

“I have found parents very receptive to these ‘prescriptions,’” explains Dr. Parry. “They know sodas aren’t healthy and they need a doctor’s reinforcement to convince their children.” Dr. Stavas adds, “Instead of prescriptions for illness, we think of them as prescriptions for health.”
The Philanthropic Initiative (TPI) merged with the Boston Foundation this year, bringing with it nearly 25 years of experience in philanthropic advising to individuals, families, foundations and corporations in Boston, across the country and around the world. Two local philanthropists who have benefited from TPI’s expertise are Ken Nickerson and Kate Deyst, a married couple who are the donors behind Eos Foundation.

“We had reached a time in our lives when we wanted to commit a major percentage of our income to philanthropy,” explains Ken. So in 1999, he and Kate seized the day and launched Eos Foundation, named for the goddess of dawn and new beginnings. They put together an outstanding staff, headed by Andrea Silbert, and reached out to Ellen Remmer, now Managing Partner at TPI, to assist them in shaping what Ken calls “cohesive themes and strategies” for their philanthropy.

Ellen helped them design their first initiative, which reflected a passion of Ken’s—breaking the cycle of intergenerational poverty in Boston by helping people to chart their own paths. It came to be called Boston Rising, and today is an independent agency.

Now they are focusing on a passion of Kate’s, which is to make a profound difference in childhood hunger. Eos Foundation has funded a number of organizations focused on hunger and food and Kate has served on the Boston Food Council, which was launched by Mayor Menino in 2008 to help Bostonians access healthy, locally-sourced food while promoting the production of food as an economic development strategy.

We’ve learned a tremendous amount about the issue of hunger and food production from the Council and from our grantees,” says Kate, “and over the last year we’ve taken a remarkable ‘learning tour’ across the country, meeting with people who are working to alleviate hunger. They have been very generous about sharing their knowledge.”

More than 700,000 people in Massachusetts are struggling to put food on the table, with 10.8 percent of households considered “food insecure.” Hunger is particularly devastating for the youngest members of our state’s families. When children are hungry, they are more likely to get sick, miss school and struggle to learn.

Over the next several years Eos will take on childhood hunger by investing at least $15 million in access to nutritious food—an effort they both hope will make a measurable difference. Ken says that while they are interested in outcomes and data and “a nuanced understanding” of what works and what doesn’t, there is another impulse he and Kate follow. “Ultimately,” he suggests, “philanthropy means a love of others. What tugs at you? What inspires you? Those are the most important questions we ask ourselves.”
“Anyone in our society who has experienced success can usually trace their success to an individual, or an institution, that inspired them to dream and work hard to develop skills to accomplish their dreams. The Boston Renaissance Charter Public School is that kind of institution.”

This quote, from the Renaissance School’s Superintendent and CEO, Dr. Roger Harris, is stenciled on a glass partition on the second floor of this remarkable school—in a spot where the sun shines through it, amplifying its message.

The Renaissance was founded in 1995 by a group of business and community leaders who wanted to offer the children of Boston a world-class education. For years it struggled, hampered by an inadequate facility in the South End and other challenges. But in 2010, under Roger’s leadership, the school moved to a beautiful, six acre, $39 million dollar student-centered campus in Hyde Park that offers an expansive, light atmosphere. The ceilings soar, as do the students.

Today, the Renaissance is the largest elementary school in Boston, but, in truth, it is more than a school. It stands as a beacon of academic, social and personal achievement for some of the city’s most underserved children: 98 percent are African American or Latino and 80 percent qualify for a free lunch.

Many struggle with health issues and have been diagnosed with special needs. “We strive to meet the myriad academic, social and emotional needs of our students by partnering with local businesses and community-based organizations to provide on-site services for children,” says Roger, “including a vision center with New England Eye Institute, a dental clinic with Tufts University Dental School, and social services with the Home for Little Wanderers. And Century Bank made it all possible.”

He is particularly proud that all students learn to understand and respect Chinese culture, speak and write Mandarin, read and write music—and play the piano. “We live in an ever-shrinking, multicultural world,” he explains. “We need to prepare students for a global economy where respect, tolerance and the ability to work cooperatively with people of diverse backgrounds will become a priority.”

Ultimately, the Renaissance is an example of the kind of education charter schools can offer because of the autonomy enjoyed by its leaders and staff. Committed to educating the whole child, it balances a rigorous academic curriculum with a focus on visual and performing arts, physical education and technology—and has a school day designed to accommodate all of these activities.

In January of this year, the school’s Voices of Renaissance Choir received the ultimate recognition when it was invited to perform at the White House. President Obama and First Lady Michelle Obama took the time to shake the hands of each of the singers—embodying for the students the kinds of dreams that can come true when they are truly inspired to succeed.
Building Boston’s Permanent Fund

The Boston Foundation opened its doors in 1915 at a time when the community foundation movement was sweeping the nation. While a number of cities established community foundations that year, they lacked the resources to actually begin making grants to nonprofit organizations.

But in 1917, a remarkable thing happened: A civic-minded Boston businessman named James Longley left a bequest of $4 million to the Boston Foundation. It was a staggering sum for the time and it catapulted Greater Boston’s community foundation to the position of being the first in the country to make grants, showing the way for other foundations across the United States.

Since then, James Longley’s bequest has been joined by those of hundreds of other generous individuals and families who care deeply about the people and places of Greater Boston.

“The Permanent Fund for Boston is an absolutely critical resource for our community,” says Grace Fey, a Boston Foundation board member who chairs a committee made up of 13 donors and professional advisors who want to add $100 million in bequests and other legacy gifts by the Foundation’s 100th anniversary in 2015.

“As a board member, I am acutely aware of the remarkable nonprofit organizations that receive major operating grants from the Foundation. They span all areas of life, from education to health to the arts and housing. And I see everything else the Foundation does for this community. That’s why my husband, Ted, and I are leaving a bequest to the Permanent Fund for Boston and why I’m chairing this committee.

“Inspired by that first gift in 1917, the Boston Foundation is asking a provocative question of people who care deeply about our community: ‘What Will You Be Doing in 100 Years?’ It really makes you think about your legacy. Imagine what Mr. Longley has done for Greater Boston over the last 100 years. Imagine what he’s doing today!”
The work of the Boston Foundation is guided by two expansive goals that reflect our deep commitment to strengthening the Greater Boston community through grantmaking, civic leadership and enhancing donor impact:

Greater Boston residents are successful and thriving
Greater Boston communities are vibrant, safe and affordable

We use all of the tools in our toolbox as we collaborate with our many partners to achieve results. These include: working with our donors to increase the impact of their giving; publishing cutting edge research; inviting the community to forums and conversations; convening grassroots, civic and business leaders for task forces and coalitions; informing and working with the media; engaging in deep public policy work; and investing our grantmaking resources in programs and initiatives that are aligned with the results we seek.

Support for all of these activities comes from the Permanent Fund for Boston, which has been built over the years through gifts and bequests from hundreds of generous donors. Our civic leadership work is supported by the Civic Leadership Fund, which has raised more than $9.5 million since it was established a decade ago.

On the following pages are brief summaries of just some of our work during 2012—including the strategies we are pursuing, some of the outcomes we hope to see and highlights of the progress we made this year in close partnership with numerous nonprofit, philanthropic, business and civic organizations.

As we work to meet these goals, we have five major objectives:

▲ Improve outcomes for Boston’s residents across the education pipeline
▲ Increase the health and wellness of Greater Boston residents
▲ Increase job growth, economic competitiveness and equity in Greater Boston
▲ Increase the livability, affordability and safety of Boston neighborhoods
▲ Enhance civic and cultural vibrancy in Greater Boston
**Strategy:** Accelerate structural reform and promote autonomies in public schools in Boston

By 2015, we seek to work with our many partners to **double the seats in autonomous schools**, such as charter schools, in Boston—and **improve student performance** along the entire education pipeline.

Recent grants in this area include $183,000 to the **Boston Plan for Excellence** to support the Dudley Street Neighborhood Charter School. Among multi-year grants are $300,000 over three years to **Unlocking Potential** to support its operation of low-performing schools in Boston using the in-district model, $300,000 over three years to the **Massachusetts Charter Public School Association** to help expand and improve charter schools, and $200,000 over three years for **Teach Plus** to involve teachers in structural reform.

The **Race to the Top Coalition**, a consortium of Massachusetts business, civic and community leaders convened by the Boston Foundation, released its first progress report since playing a major part in passing statewide education reform. The report shows positive results for turnaround schools and charter schools.

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**Strategy:** Increase the 2- and 4-year college graduation rate for low-income students of color and first-generation college students from Boston’s public schools

In this area, we want to **increase from 35% to 70% the college completion rate** for Boston Public Schools graduates by 2017.

Our major investment is $1 million a year to the **Success Boston College Completion Initiative**, which is supported by 38 colleges and universities and numerous other public and private partners. Additional grants include $125,000 for the Commonwealth’s **Vision Project**, to measure success rates at public higher education institutions.
**Strategy:** Promote the career advancement and economic security of low-income individuals

By 2015, we seek a **150% increase in the number of adult learners** entering post-secondary institutions, an increase in certificates in key occupational areas and 3,500 low-income residents placed in **career pathway jobs**.

Grants include $800,000 over two years to **SkillWorks**, a public/private partnership led by the Boston Foundation, and $100,000 over two years to **LIFT-Boston** which helps low-income adults find jobs. We also support job training programs, including $300,000 over three years to **Hebrew Senior Life** and $300,000 over three years to **Jewish Vocational Service**.

The **Coalition FOR Community Colleges**, convened by the Boston Foundation, played a major role in passing sweeping reforms to the Massachusetts community college system designed to align them more closely with the workforce development needs of the state.

**Strategy:** Encourage healthy behaviors among Boston residents and increase access to healthy food and opportunities for physical activity

The goal is to **reverse the epidemic of obesity**, with a focus on reducing the number of Boston children who are either overweight or obese, and strengthening public health expenditures for efforts that **promote wellness**.

Grants include $100,000 for the state’s **Mass in Motion** and **Healthy Dorchester** initiatives and $100,000 over two years to **Victory Programs/Revision Urban Farm** to improve food access for Dorchester and Mattapan residents.

The **Healthy People/Healthy Economy Coalition**, convened by the Boston Foundation and NEHI and dedicated to making Massachusetts the national leader in health and wellness, released its **Second Annual Report Card** and filed legislation to end the state sales tax exemption on soft drinks and candy and to restore physical activities to the state’s schools.
**Strategy:** Grow local businesses and increase job growth and access for low-income residents

To **strengthen economic competitiveness** in Greater Boston, we are working with numerous partners to create **5,000 new jobs**, create or retain **850 new businesses** and increase investment in small businesses.

Grants include **$50,000 to CropCircle Kitchen**, Boston’s only food business incubator, and **$180,000 to Interise**, which provides small business owners with education and access to networks and markets.

This year, the Boston Foundation, in collaboration with the Massachusetts Technology Collaborative, the Greater Boston Manufacturing Partnership and RBS Citizens, published **Staying Power II**, a report on manufacturing in Massachusetts, showing that this sector is still going strong and highlighting the need for skilled workers.

**Strategy:** Reduce the incidence of violence in Boston neighborhoods, especially among youth

**StreetSafe Boston**, a Boston Foundation initiative, aims to **help gang members** resolve longstanding feuds and disarm—as well as reach out to youth in the five neighborhoods most affected by violence to help them access services and **education that leads to employment**.

StreetSafe Boston received **$1,200,000** this year as part of a five-year commitment. Another grant of **$150,000** over three years went to **Mothers for Justice & Equality**, a grassroots organization devoted to ending neighborhood violence.

**My Summer in the City**, a Boston Foundation initiative that is also generously supported by our donors and other funders, kept 17 parks and playgrounds open with longer hours and funded more than **400 summer jobs for teenagers** with 70 jobs earmarked for youth involved in the criminal justice system.
Strategy: Increase neighborhood stability and the production and preservation of affordable housing

By 2015, the Foundation seeks to help preserve 6,500 affordable housing units and produce 6,500 additional units, while saving 600 units from foreclosure. The Foundation is supporting the groundbreaking Fairmount/Indigo CDC Collaborative with a grant of $1 million over five years for community development along that transit line. Other multiyear grants include $700,000 over three years to Local Initiatives Support Coalition (LISC) to leverage national funding for housing and community development.

The Boston Foundation received the U.S. HUD Secretary’s Award for Community Foundations for helping drive the public/private partnerships that created the $22 million Neighborhood Stabilization Loan Fund.

Strategy: Strengthen and celebrate Boston through audience engagement and the elevation of culture

By 2015, the Boston Foundation seeks once-weekly arts instruction for 100% of all K-8 Boston Public Schools students and an increase in the stability of key cultural organizations.

Grants include $300,000 over three years to EdVestors to increase arts instruction in Boston’s school system. Other grants went to increasing the stability of organizations, such as a $365,000 grant over five years to Jose Mateo Ballet Theater.

The state’s Cultural Facilities Fund, which the Foundation helped to create, granted $5 million this year and the Foundation helped to catalyze the launch of MASSCreative, a statewide arts and advocacy organization. The Boston Foundation and Barr Foundation also launched a new phase of the Culture for Change initiative, which helps youth build fluency in the arts while taking leadership on issues of racial justice.
A Focus on People and Place

The Boston Foundation has a strategic framework, called Thriving People/Vibrant Places, which guides our grantmaking, research, convening, public policy work and special initiatives.

All of the resources for our grantmaking in Greater Boston are from the Permanent Fund for Boston, which has been built over the years through gifts and bequests from Boston-area donors who care deeply about our community.

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale and are significantly aligned with the two major goals and five objectives below:

**Goals:** Greater Boston residents are successful and thriving
Greater Boston communities are vibrant, safe and affordable

**Objectives:**

- Improve outcomes for Boston's residents across the education pipeline
- Increase the health and wellness of Greater Boston residents
- Increase job growth, economic competitiveness and equity in Greater Boston
- Increase the livability, affordability and safety of Boston neighborhoods
- Enhance civic and cultural vibrancy in Greater Boston

**Types of Support**

There are three principal types of support available from the Foundation's discretionary grantmaking resources:

**Competitive Grants:** At any point in time, there are 150 to 175 organizations in the Foundation's competitive grants portfolio. Most of these partners are doing work that is highly aligned with the approaches and end-state results to which the Foundation seeks to contribute. A limited sub-set of those partners are doing important work outside of those areas. Over the past three years, the Foundation has made a shift toward making larger, multi-year, operating support grants to core partners, as well as program and project grants where appropriate. Applying for a competitive grant starts with a simple on-line Letter of Inquiry (LOI). Please speak with a member of the Foundation’s Program staff before submitting an LOI.

**Vision Fund:** These are grants of up to $7,500, awarded to organizations for capacity-building projects including board development, strategic planning, exploring or piloting a new program area, or planning for collaboration with other organizations. Priority is given to organizations that are not likely to be eligible for competitive grants. Applying for a Vision Fund grant starts with an on-line application accessed from our website.

**Initiative Grants:** A significant amount of the Foundation's grant funds are distributed through special initiatives. Often, these funds are not open to broad application—for example StreetSafe Boston, Success Boston, CHAMPS Boston and others. At times—as with SkillWorks—there are periodic Requests for Proposals (RFPs) for organizations that are defined as eligible by the specific initiative. Information about such RFPs is available on the Foundation’s website.

We invite you to visit our website for detailed information about how to reach us and how apply for a grant. Please go to www.tbf.org and choose “Investing in Nonprofits.”
Customizing Charitable Solutions One Donor at a Time

It all begins with you. Your vision joined with our experience means that together we can design a philanthropic plan to define and achieve your goals. We will marry your aspirations and passion for giving with our deep understanding of the important issues facing our communities to realize results that matter.

Whether you are just beginning your philanthropic journey or possess a high level of clarity and sophistication, we can strategically tailor solutions to serve you and create positive change for the causes you care about most.

Expertise and Service That Can Maximize Your Giving

Our knowledgeable and dedicated Donor Services staff will be your partner in philanthropy by meeting you where you are and getting you where you want to be. Whether your interests are at home or abroad, we provide expertise on a range of issues and help you measure the impact of your giving. For all donors, we serve as a liaison to the ideas, approaches and people working to realize a more vibrant community. For those who wish to go deeper, we offer customized consulting through The Philanthropic Initiative (TPI), a division of the Boston Foundation, to help you navigate challenges and create, implement and evaluate tailored philanthropic strategies that may include or go beyond grantmaking.

Meeting Your Goals Through a Donor Advised Fund

The Boston Foundation has been a Donor Advised Fund expert for more than 30 years and has hundreds of these funds—ranging in size from $10,000 to $40 million. A Donor Advised Fund operates much like a private foundation, without the administrative or payout burdens. You make unlimited grants anywhere in the U.S. or abroad when it is most convenient for you—and receive the maximum charitable tax deduction every time you add to your fund. Only one simple form is required to establish a fund.

Incorporating Charitable Giving Into Your Estate Planning

We also offer many ways to incorporate charitable giving into your estate planning—and will help you decide which type of gift is right for you. You can make a planned gift by will or trust, gifts of retirement plan assets and life insurance and gifts that pay you income and preserve assets for your heirs. Your gift can benefit any type of named fund or combination of funds (Donor Advised, Designated, Field of Interest or the Permanent Fund for Boston).

Choosing the Contribution That’s Right for You

We accept gifts of cash, stocks and bonds, complex assets, including closely held or restricted stock, gifts of real estate and LLC or partnership interests. Whether you make a charitable gift during your lifetime or through your estate, we can accommodate your giving plans.

Having an Impact Through the Civic Leadership Fund

Many Boston Foundation donors and others make an annual gift to the Civic Leadership Fund, which fuels innovation by helping the Foundation identify and address critical challenges facing our community. Through gifts to this fund, the
Foundation publishes cutting-edge research, holds compelling public forums and creates action plans for positive change, making real progress in education reform, health and wellness, smart-growth housing and our cultural infrastructure.

A Merger to Strengthen Our Community

In early 2012, the Boston Foundation entered into a historic partnership to offer a new level of customized consulting and support to our donors and the broader community. Our merger with The Philanthropic Initiatives (TPI) creates new avenues to increase the impact of your giving—whether it is focused locally, nationally or internationally and regardless of the giving vehicles you use.

Through the TPI team, the Foundation is well-positioned to help families, foundations and corporations design and implement a wide range of creative philanthropic strategies that may include grantmaking or go beyond. We can conduct deep research, help you find focus, guide “next generation” engagement or provide ongoing coaching to make your philanthropy more effective and rewarding.

What Will You Be Doing in 100 Years?

Help Us Build the Permanent Fund for Boston

In 1917, a Boston businessman named James Longley left a large bequest to the Permanent Fund for Boston. It was so large that it made Greater Boston’s community foundation the first in the country to make grants.

Today, he is helping Boston Public Schools graduate Elisio Depina fulfill his dream of a college education through an initiative called Success Boston, which receives major support through the Foundation’s Permanent Fund for Boston.

To mark our 100th Anniversary in 2015, the Boston Foundation is reaching out to our donors and others to establish named funds within the Permanent Fund for Boston and thereby strengthen this critical fund, which supports all of our grantmaking in Greater Boston and gives us the flexible resources needed to respond to the most urgent needs of the day.

We Invite You to Join Us

The Boston Foundation has many ways to incorporate planned and legacy giving into your estate plan to benefit the Permanent Fund for Boston. We can help you decide which type of gift is right for you. You can create a named fund through a flexible, unrestricted gift or direct your gift to an issue, population or cause you care about deeply. Make a permanent gift to Boston’s primary endowment with confidence that it will always be used to meet the most urgent needs facing Greater Boston.

For more information about helping us build the Permanent Fund for Boston, becoming a donor or working with TPI, call the Development Office at 617-338-1700 or visit the Foundation’s website at www.tbf.org and choose Giving.
The Boston Foundation has a mandate both to fulfill its role as Greater Boston's community foundation today—by maximizing dollars available for making grants—and to ensure that the charitable dollars entrusted to the Foundation are available to continue this work tomorrow and in perpetuity. Robust development efforts and a well-diversified investment strategy enable the Foundation to meet these objectives.

**Fund for the 21st Century**

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

**Financial Oversight**

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

The assets of the Balanced Plus Pool include not only traditional stock and bond 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 2012 spending rate was 6.4% for its permanently restricted discretionary funds.

**Investment Performance:** as of June 30, 2012

<table>
<thead>
<tr>
<th>Fund for 21st Century Investment Options:</th>
<th>1 Year</th>
<th>3 Years</th>
<th>5 Years</th>
<th>10 Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balanced Plus Pool</td>
<td>0.0%</td>
<td>9.0%</td>
<td>0.7%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Balanced Pool (established 2/1/11)</td>
<td>(0.8)%</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Short-Term Pool (established 1/1/10)</td>
<td>0.11%</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Benchmarks:</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>S &amp; P 500 Stock Index</td>
<td>5.4%</td>
<td>16.4%</td>
<td>0.2%</td>
<td>5.3%</td>
</tr>
<tr>
<td>MSCI All Country World Stock Index</td>
<td>(6.5)%</td>
<td>10.8%</td>
<td>(2.7)%</td>
<td>5.7%</td>
</tr>
<tr>
<td>65% S &amp; P 500 Index/35% BC Aggregate Index</td>
<td>6.6%</td>
<td>13.4%</td>
<td>2.9%</td>
<td>5.8%</td>
</tr>
<tr>
<td>65% MSCI A.C. World/35% Citigroup World Bond Index</td>
<td>(2.9)%</td>
<td>9.2%</td>
<td>1.2%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Three Month Treasury Bills</td>
<td>0.04%</td>
<td>0.09%</td>
<td>0.9%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Notes: Performance is shown net of investment manager fees. Past performance is no indication of future results.
For Fiscal Year 2013, the Board again approved a spending rate of 6.4%. 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.

Merger with The Philanthropic Initiative

Effective January 1, 2012 the Philanthropic Initiative, Inc. (TPI) merged with the Boston Foundation as a new and 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 have significantly expanded the range of philanthropic services the Foundation now offers. During the six-month period ending June 30, 2012, the operations of TPI added $1,053,000 of service fee income to the operations of the Foundation. In addition, TPI’s net assets of $600,000 at the time of the merger have been recognized as a contribution due to merger.

Financial Analysis

Total assets of the Boston Foundation declined from $860 million at June 30, 2011 to $804 million at June 30, 2012. For the year net investment returns were 0.0%. During this period, the Foundation received $59.8 million of contributions and made $98.4 million of grants. Expenditures for program support and operating expenses totaled $179 million thus explaining the change in total assets. Although the investment environment was uncertain during the year, the Foundation continued its investment in the communities that it serves.

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 36. The audited statements and form 990 are available on our web site at www.tbf.org.
# 2012 and 2011 Summary Financial Statements (in thousands)

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investments</td>
<td>$ 765,335</td>
<td>$ 825,101</td>
</tr>
<tr>
<td>Receivables &amp; Other</td>
<td>9,635</td>
<td>9,360</td>
</tr>
<tr>
<td>Cash Equivalents</td>
<td>29,251</td>
<td>25,049</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>$ 804,221</td>
<td>$ 859,510</td>
</tr>
<tr>
<td><strong>Liabilities &amp; Net Assets:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts Payable and Other Liabilities</td>
<td>$ 6,554</td>
<td>$ 7,290</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>3,556</td>
<td>2,602</td>
</tr>
<tr>
<td>Net Assets</td>
<td>794,111</td>
<td>849,618</td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td>$ 804,221</td>
<td>$ 859,510</td>
</tr>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$ 59,760</td>
<td>$ 81,215</td>
</tr>
<tr>
<td>Contribution due to merger</td>
<td>600</td>
<td></td>
</tr>
<tr>
<td>Service fee income</td>
<td>1,053</td>
<td></td>
</tr>
<tr>
<td>Net Investment Return</td>
<td>(335)</td>
<td>139,099</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>61,078</td>
<td>220,314</td>
</tr>
<tr>
<td><strong>Grants &amp; Expenses:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>98,388</td>
<td>77,521</td>
</tr>
<tr>
<td>Change in Split Interest Trusts</td>
<td>332</td>
<td>67</td>
</tr>
<tr>
<td>Program Support</td>
<td>5,700</td>
<td>5,006</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>12,165</td>
<td>11,233</td>
</tr>
<tr>
<td><strong>Total Grants &amp; Expenses</strong></td>
<td>116,585</td>
<td>93,827</td>
</tr>
<tr>
<td>Change in Net Assets</td>
<td>(55,507)</td>
<td>126,487</td>
</tr>
<tr>
<td>Net Assets Beginning of Year</td>
<td>849,618</td>
<td>723,131</td>
</tr>
<tr>
<td><strong>Net Assets End of Year</strong></td>
<td>$ 794,111</td>
<td>$ 849,618</td>
</tr>
</tbody>
</table>

The financial statements include all funds held by the Foundation, including the Fund for the 21st Century.
For close to 100 years, hundreds of individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing and contributing to funds at the Boston Foundation. The Foundation works closely with donors to strengthen their giving—and helps an ever expanding number of individuals and families 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, purpose and history, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston’s community foundation for today and the future.

**New Donors to the Permanent Fund for Boston**

The Permanent Fund for Boston provides the vital resources the Boston Foundation needs for its grantmaking in Greater Boston. We thank these donors who contributed to this important fund this year.

Anonymous Fund at the Boston Foundation  
Geraldine Baldotti  
Maria E. Benet and Joseph T. Geller  
Buckman Fund at the Boston Foundation  
Wendy Chen  
Dawn-Marie Driscoll  
Field Parker Fund at the Boston Foundation  
Frank B. Thayer Fund at the Boston Foundation  
Estate of Anne C. Gray  
Brian Hyde  
David Kalan  
Barbara Keezell  
John Kinny  
David and Jane Kislak  
Bayard Klimasmith  
Brooke L. Manfredi, Esq.  
Mason Charitable Remainder Annuity Trust  
William Morgan  
Orpheus Fund at the Boston Foundation  
Emma K. & Richard Pigeon Fund at the Boston Foundation  
Jordan S. Ruboy  
Walter J. and Marjorie B. Salmon  
Dana P. & Maude E. Simosno Memorial Fund at the Boston Foundation  
Betty L. Singer  
Reynolds R. and Pamela M. Smith Foundation  
Barbara Starr Wolf  
Satya Thakkar  
H. Reed Witherby and Ivers Bever  
Hungwah Yu and David J. Elliott

**49 New Funds were Established in Fiscal Year 2012**

**Discretionary Funds**
- Equality Endowment Fund
- Latino Legacy Fund

**Designated Funds**
- 1819 Greek Revival Renewal Fund
- All Hands Volunteers Sustainability Fund (AHVSF)
- Committee to Light Commonwealth Avenue Mall Fund
- William V. Ellis Fund for Our Lady of Good Voyage Carillon

**Donor Advised Funds**
- Anonymous (6)
- APOC Fund
- Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund
- Bither Charitable Fund
- Butler’s Hole East
- Butler’s Hole North
- Butler’s Hole South
- Crane Fund
- William J. Ducas Charitable Fund
- Edgerley Family Fund
- Elliott and Yu Education Fund
- Flower Hill Fund
- Giudice Family Fund
- Gordon Place Charitable Fund
- Tim and Carolyn Grimes Charitable Fund
- Haiti Sustainable School Fund
- Emily C. Hood Fund
- Hope and David Jeffrey Fund
- Kindling Fund
- Longfield Family Foundation
- May-McClain Charitable Gift Fund
- Eric and Sue May Charitable Fund

*continued on next page*
The following planned and legacy gifts were received in 2012 and are very gratefully acknowledged.

Estate of Barbara Anderson
Dorothy Q. and David B. Arnold, Jr. Charitable Trust
Estate of Priscilla Cobb
Jessie B. Cox Charitable Lead Trust
Theodore H. Cutler Family Charitable Trust
Estate of Harry F. Evarts
Stanley J. and Sema F. Gelin Charitable Remainder Trust
Estate of Anne C. Gray
Janey Fund Charitable Trust
Estate of William Roger Kelley
Michael R Kidder 1996 Charitable Trust
Chiara Maria Levin Charitable Trust
Peter S. Lynch Charitable Unitrust
Mason Charitable Remainder Annuity Trust
Richard W. May Charitable Remainder Trust
Estate of Richard Mintz
Susan Noble 2008 Revocable Trust
Joseph and Katherine O’Donnell Charitable Trust
Robert Petersen Trust
Harold Whitworth Pierce Charitable Trust
Pozen Charitable Lead Annuity Trust
Estate of Ruth Gossner Schocken
Ray & Maria Stata Family Charitable Fund of November 1983
Lawrence Sykes CLAT
Angela F. Winthrop Charitable Remainder Unitrust
Rogerson Legacy Society

Named for founders of the Boston Foundation, the Rogerson Legacy Society recognizes those donors who have included the Foundation in their planned and estate gifts. Through their thoughtful generosity these donors have created a legacy to ensure the future vitality of our community.

Mary Lee T. and Peter C. Aldrich
G. Thomas and Allison Aley
Howard and Carol Anderson
Diane DeSerras Arenella
David Arnold, Jr. and Dorothy Arnold
Mrs. John Atkinson*
Geoffrey D. Austrian
Theodore S. Bacon, Jr.
Sherwood E. Bain
Mary Barber
James and Hanna Bartlett
Rich Becker
Laurie A. Bencal, CPA
Doreen B. Biebusch
Thomas W. Bird
Beryl H. Black*
David Blot
Janine Bouchard
Kenneth S. Brock
Jacob F. and Barbara C. Brown
Beryl H. Bunker*
George E. Burden*
Nonnie S. Burns and Richard M. Burnes, Jr.
Margaret A. Bush
Frank and Ruth Butler
Robert B. Canterbury
Helen T. W. Chen and Keith R. Ohmart
Edward A. and Penny Cherubino
Arthur D. Clarke and Susan P. Sloan
Margaret J. Clowes
Frances F. Connelly
Lewis and Constance Counts
Barry B. Corden and Ian F. Lane*
Elizabeth D. Coxe
Diane Currie
Marilyn Darling
David S. and Shirley G. Dayton
Lucy S. Dillon
Ralph J. Donofrio
Joy G. Dryfoos*
Malcolm Dunkley
Catherine Axon and Thomas M. Elder
Anita Maria Elliott
Amy Zell Ellsworth
Marjorie B. Esselen
Grace and Edward Fey
June M. Ficker
Joe Fiorello
Walter Eugene Geier*
Robert J. Glaser, M.D.*
Sandra and Philip Gordon
Andrew C. Goresh
Kate and Thierry Guedj
Dr. G. Anne Guenzel
Thomas Hale
Charlotte I. Hall
Mrs. Chester Hamilton
Marilyn L. Harris
Barbara Hauser Woodward
Ann S. Higgins
Petie Hilsinger
Kenneth D. and Cynthia L. Holberger
Chuck Holland
Helen R. Homans
Marjorie Howard-Jones
Muriel Hurovitz
Brian Hyde
Jane Wegscheider Hymann
Stephen G. and Rosemarie Torres Johnson
Helen M. Jones
Karen A. Joyce and John Fitzgerald
Ruth G. Kahn
Andrew M. Kamarck*
Gary P. Kearney, M.D. and Susan Kearney
Jonathan M. and Judith B. Keyes
Vera Kilstein
Alan J. Greenfield and G. Paul Kowal
Barbara N. Krawitz
Peter and Stephanie Kurzina
Frances J. Lee-Vandell
Carol F. Levin
John H. Livens
Donald J. and Susan Kelley MacDonald
Myron* and Barbara Markell
Robert and Poppy Mastrovita
Stephen J. McCarthy
Alice McGrath*
Edward J. and Jane S. Michon
Robert Minnocci
Timothy and Deborah Moore
Charles Fessenden Morse
Donald M. Morse
Herbert Morse
Frederick W. Neinas, MD
Mary Greene Nelson*
Beatrice and Peter Nessen
F. William Nigreen and Kathleen McDermott
Carl H. Novotny and Rev. Judith Swahnberg
Mark A. and Judith A. Osborne
Jennifer Jossie Owens
Douglas D. and Geraldine Payne
Nancy E. Peace
Drs. Robert A. and Veronica S. Petersen
Agatha W. Poor
Nathaniel Pulsifer
Glendora M. Putnam
Irving W. Rabb*
Warren Radtke and Judith Lockhart Radtke
Chris Remmes
Richard L. Robbins
Gary and Natalie Robinson
Sumner and Helen Rodman*
Eleanor L. Ross
Edith M. Routier
Jordan S. Ruboy, M.D.
John A. Russell
Beverly H. Ryburn
Anthony Mitchell Sammarco
Wendy Sanford
Margaret Schmidt and Kenneth Danila
Ruth Gessner Schocken*
Charles R. Schroeder*
Norman J. and Maryellen Sullivan Shachoy
Annabelle W. Shepherd
Jennifer F. and Daniel I. Sherman
Binkley and Paula Shorts
Ellen L. Simons
Cheryl H. Smith
William F. Spang
Scott F. Squillace and Shawn M. Hartman
David F. Squire
Thomas W. Stephenson*
Arthur L. Stevenson
Ellen Stillman
Anne B. Stone
Elihu and Bonnie Stone
Congressman Gerry E. Studds* and Dean T. Hara
Anne Thompson
Libby and Sidney Topol
Alan and Pamela Trefler
David F. Tuttle, Jr.
Joy E. Van Buskirk
Peter S. and Pamela L. Voss
Robert R. Wadsworth & Catherine E. Moritz
J. H. Walton, Jr. and Carolyn Walton
Gordon Weil, Jr.
Elizabeth A. Wheeler
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

Anonymous Society Members = 82
* Deceased
Bold Names = Permanent Fund for Boston & Field of Interest Gifts
Donors to the Civic Leadership Fund

This critical fund helps to fuel the Boston Foundation’s highly effective formula for civic leadership, which includes: publishing cutting edge research; holding major forums and convenings; conducting strategic and proactive grantmaking; forming task forces and coalitions; using communications and the media—and engaging in deep public policy work. A number of areas of community life have benefited from this work, including health and wellness, public education, smart growth housing, cultural facilities funding, municipal finance reform and CORI reform. We thank all of this year’s generous donors.

Anonymous donors (11)
A.W. Perry, Inc.
Susan L. Abbott
Abrams Foundation
Allyn Foundation, Inc.
Carol & Howard Anderson Family Fund
Anony Fund
Ansara Family Fund
W. Gerald and Patricia Austen
Bank of America Charitable Foundation
Bank of New York Mellon
Laura K. Barooshian
Beacon Capital Partners, LLC
Eugenie Beal
Robert L. Beal
James and Susan Beck
Joshua and Anita Bekenstein
Kenneth J. and Leigh A. Bento
Roger S. Berkowitz
Blue Cross Blue Shield of Massachusetts
Jane Bradley
Joan T. Bok Fund
Boston Global Bridge Institute
Boston Globe
Boston Herald
Boston Private Bank & Trust Company
Peter A. Brooke Fund
William T. Burgin Fund
Richard M. Burnes, Jr.
Catherine and Paul Buttenwieser Foundation
Thomas J. Butters
Meg Campbell
Capeway Interiors
Stephen Chan
Fay M. Chandler
Chertavian Family Fund
The Chiofaro Company
Citizens Bank Foundation
Colliers Meredith & Grew
Ferdinand Colloredo-Mansfeld
John M. Connors, Jr.
Conventures, Inc.
Brian and Karen Conway
Lawrence Coolidge
Cooper Leeser Family Fund
Joseph Corcoran
Constance and Lewis Counts Fund
Joseph M. Cronin
Stephen Crosby and Helen Strieder
John J. and Diddy Cullinane
Curriculum Associates
Ted and Joan Cutler
Dainger Fund
Catherine D’Amato
Dammann Boston Fund
André & Marilyn Danesh Fund
Michael Danziger
Darling Family Fund
The Davis Companies
Corey L. Davis
John H. Deknatel Family Fund
Denham Capital Management
Denterlein Worldwide Public Affairs
Gerry and Kathleen DeRoche
Gururaj and Jaishee Deshpande
DeWolfe Family Fund
Lawrence S. DiCara
James S. and Janice DiStasio
Ralph J. Donofrio
Michael H. Dowdavjjian
The Drew Company, Inc.
The Druker Company, Ltd.
The Eastern Bank Charitable Foundation
Douglas R. Elderle
The Edgecerry Family Foundation
William S. Edgerly
Michael and Barbara Eisenson
David and Marion Ellis
Peggy Eysenbach
Feeley & Driscoll, P.C. Charitable Foundation
Ian and Corinne Ferguson
Grace Fey
William M. Fine
Paul and Phyllis Fireman Charitable
Mark and Mary Marncy Fischer
Steven S. Fischman
Fish Family Foundation
Laurence B. Flood and Mary Tyler Knowles
Forshey Family Fund
Tom and Carla Fortmann
Francis Ward Paine Foundation, Inc.
Robert H. and Rochelle R. Friedman
Susan Y. Friedman
FUEL Accounts Fund
Fulkerson Family Fund
Brendan Furey
Gabrieli Family Foundation
Anna A. Gallo
Gannon Family Charitable Fund
Richard C. and Louisa Garrison
Gergen Family Fund
Robert E. and Brian S. Giannino-Racine
Ginsburg/Kaplan Fund
Giving Three Fund
Glassman Family Fund
Carol R. & Avram J. Goldberg Fund
Gordon Educational Fund
Gourmet Caterers
Grand Circle Foundation
Paul S. Grogan
Guenzel-Pieters Family Fund
H.N. Gorin, Inc.
Ray Hammond
Harvard Pilgrim Health Care Foundation
Harvard University
George N. Hatopolous
Anthony and Brenda Helies
Petie Hilsinger Fund
Margaret Hixon Fund
Thomas and Diane Hollister
Joseph L. Hooley and Linda G. Spiro
Hunt Alternatives Fund
Brian Hyde
Income Research & Management
Edmund and Margaret Ingalls
Isaacson Miller, Inc.
Ira A. Jackson
Jacobson Family Foundation
Jackie L. Jenkins-Scott
John Hancock Financial Services
Stephen and Cheryl Jonas
Jeffrey F. and Susan C. Jones
Tripp and Robin Jones
Albert J. and Diane E. Kaneh Fund II
Martin S. Kaplan
Karp Family Foundation
Brian H. and Susan M. Kavoogian
Michael B. Keating
Jill Ker Conway
Jonathan M. and Judith B. Keyes
Kidder Smith Fund
John Kinney
The Klorman Family Foundation
Peter Carter Knight and Deborah Sanford Knight
Kenneth B. Knox
KPMG, LLP
The Robert & Myra Kraft Family Foundation, Inc.
Anne C. Kubik and Michael A. Krupka
Charitable Gift Fund
Paul A. and Mary E. La Camera
Edward H. and Berthe K. Ladd
John LaPann
Barbara Lee Family Foundation
C. Martin Leinwand Fund
Mary Kay Leonard & Richard W. Valachovic
Loh-Sze Leung and Peter Tsai
Shari and Robert Levitan
Liberty Mutual
Martin Liebowitz and Mary M. Lassen
Linde Family Foundation
LMG Fund
Marjorie L. and James M. Lober Fund
Longfield Family Foundation, Inc.
Richard K. Lubin Family Foundation
Lynch Foundation
Brooke L. Manfredi
Martin and Tristin Mannion
Claudio Martinez
Mason-Brown Fund
Mass Insight Education and Research Institute
Sydell and Edward I. Masterman Fund
Neville McCaghren and Dune Thorne
McCall & Almy, Inc.
Kevin McCall
Kathleen M. McDonough
Duncan McFarland
William P. McQuillan
Robert F. Meenan
Mary Jo Meisner
Mellowes Fund
Jack and Beth Meyer
Mill River Foundation Fund
Gabrielle J. Miller Donor Advised Fund
Scot A. and Lorraine L. Miller
Sucharita Lira Mishra
David and Mary Ellen Moir
Michael E. Mooney
Robert S. Morris Advised Fund
Herbert E. Morse
Frances S. Moyer
Muddy Pond Trust Fund
David G. Mugar Fund
Sherif and Mary Nada
NAIOP Massachusetts
National Development Associates of New England, LP
National Grid
Frederick W. Neinas
Peter Nessen
New Community Fund
Max Nibert
Novack Family Foundation
Novotny/Swahnberg Fund
Obermayer Foundation, Inc.
Joe O’Donnell
Thomas L. P. O’Donnell
Ronald P. O’Hanley
Pauline O’Leary and Mr. John Malarkey
Thomas P. O’Neill, III
Ruben D. Orduña and Elizabeth G. Hill
Anthony Pangaro
Parker Family Fund
Harold & Nancy Parritz Family Foundation
Partners HealthCare
Elizabeth Pauley
Petersen Family Fund
Kevin and Anne Phelan
Colette A.M. Phillips
Michael E. Porter
Margaret Mack and John Powell
PricewaterhouseCoopers LLP
Prime Buchholz
Susan D. Prindle
Red & Blue Foundation
Remmer-Fox Family Fund
John and Dorothy Remondi Fund
Hanson S. Reynolds
Mitchell Roberts
William G. Rogerson
Rohda Family Charitable Foundation
Jeffrey B. Rudman and Susan V. Fried
Rutabaga Capital Management
Paul and Ann Sagan
Schawbel Family Fund
Helen Chin Schlichte
Charles S. and Zena A. Scimeca Charitable Fund
David and Marie Louise Scudder
Greg A. and Michelle A. Shell
Sherman Family Foundation Fund
Charles E. and Deana M. Shirley
The Sidman Foundation
John and Susan Simon Boston Foundation Fund
Gary and Lynne Smith
Richard and Susan Smith Family Foundation
Gail Snowden
William and Christine Speciale
Spector Fund
Stephanie H. & David A. Spina Family Foundation
Micho and William J. Spring
David F. Squire Family Fund
Ray & Maria Stata Family Charitable Fund of November 1983
State Street Foundation
Suhrbier Family Fund
Summit Financial Corporation
TA Associates Realty
Sara Tezza
Peter and Laurie Thomsen
Michael K. Tooka
Gregory Torres and Elizabeth Pattullo
Tufts Associated Health Plan
Alfred F. Van Ranst, Jr.
Robert W. and Joan S. Weinstein
Paul Wendt
Charles Wibiralske and Katherine Lapine
Wilderness Point Foundation
Benaree P. and Fletcher H. Wiley
William Gallagher Associates Foundation
George and Judy Wilson
Winn Development Company
Marshall A. Wolf and Katharine P. Wolf
Lovett-Woodsum Family Fund
Hungwah Yu and David J. Elliott
Zabin Charitable Fund
Peter and Ellen Zane
Zug Family Fund
Many donors have established funds that are totally unrestricted or have quite broad purposes, giving the Boston Foundation flexibility in the way the income is used. These are the primary funds for which Greater Boston area nonprofit organizations may apply. They provide support to programs that address a broad range of community needs. The following is a list of all Discretionary Funds established at the Boston Foundation since 1915.

**The Permanent Fund for Boston**

The Permanent Fund for Boston is the most flexible fund the Boston Foundation holds, giving our staff and board the crucial resources they need to respond to the most critical issues facing contemporary Greater Boston. The Foundation is dedicated to building this important fund that supports crucial activities in education, health, housing, workforce development, arts and culture—and all areas that have an impact on Greater Boston. The following includes donors who have made gifts totaling more than $5,000 to this fund, with the year of their first contribution noted in parentheses.

**Individuals, Corporations and Foundations**

Mr. and Mrs. Pealealr Brooke (1994)
The Boston Company (1991)
Brother Thomas Charitable Foundation (2007)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
Catherine and Paul Buttenwieser Foundation (2003)
Linda Cabot Black Foundation (2005)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation, Inc. (2007)
Combined Jewish Philanthropies of Greater Boston, Inc. (2007)
Commonwealth of Massachusetts (2009)
Michael E. Cronin (2004)
Lawrence and Susan Daniels Family Foundation (2003)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
Martha M. Fosdick Fund (1978)
Grand Bostonians Dinner (1984)
Anne C. Gray (2010)
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)
Stephen P. Jonas (2007)
John S. and James L. Knight Foundation (2009)
Dr. & Mrs. Arthur R. Kravitz (1987)
Mr. and Mrs. Gael Mahony (1982)
Wilbert G. and Eunice Muttart Foundation (2007)
Northern Trust (2005)
The Overbrook Foundation (1991)
Philanthropic Collaborative, Inc. (2005)
Harry & Minnie Rodwin Memorial Fund (1975)
Pamela M. Smith (2006)
Dr. W. Davies Sohier, 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)
Ms. Hungway Yu and Mr. David J. Elliott (2002)
Albert and Judith Zabin (2008)

**Trusts**

Margaret Shaw Allen Trust (1982)
James R. Bancroft Trust (1983)
Helen C. Barker Trust (1990)
Nancy Beals Trust U/W (1984)
Helen C. Barker Trust (1990)
Paul Elliott Trust U/Agreement (1991)
Ruth S. Frake Trust Bequest (1981)
Donald Gregg Subtrust (2008)
Named Funds and Field of Interest Funds

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

Solomon Agos fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics

Emily Tuckerman Allen Fund (2006)

Anonymous Fund (1987) unrestricted

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

Geno A. Ballotti Fund (1984) unrestricted

Irene W. Bancroft Fund (1997) unrestricted

Harriett M. Bartlett Fund (1987) unrestricted

Diane Heath Beever Memorial Fund (2008) to support programs that address substance abuse and/or mental illness, with a primary focus on prevention

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

continued on next page
Named Funds and Field of Interest Funds continued

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

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

Boston Foundation Arts Fund (1997) for the Boston Foundation’s Arts Initiative

Edith Allanbrook Fund (2002) to provide for children with extraordinary promise in the area of the arts

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

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

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

Brother Thomas Fund (2007) dedicated to the support of organizations and activities that benefit, support, encourage or celebrate struggling artists working in any and all media in the Greater Boston area


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


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

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

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

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

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

David W. Cushing Fund (1987) for charitable work as shall assist young people, particularly women


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

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

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

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

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

Katherine E. Dooley Fund (1997) unrestricted

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

Kate Ellis Fund (1953) for convalescents, children, blind and deaf persons, and homes for Protestant aged men and women

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

Equality Endowment Fund (2011) for ongoing support to local and regional charitable organizations that are advancing the equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer (“LGBTQ”) people and their families in Greater Boston

Equality Grantmaking Fund (2011) for annual grant support to local and regional charitable organizations that are advancing the equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer (“LGBTQ”) people and their families in Greater Boston

Mary C. Farr Arts Fund (2005) for the enhancement of cultural affairs in Boston such as support for the Boston Ballet, for scholarships for needy residents and for support of needy residents of Boston

Herbert and Lucy Fields Fund (2008)

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

Fund for the Environment (formerly the Fund for the Preservation of Wildlife and Natural Areas) (1994)

Allyn Cox Fund for Essex County Greenbelt (1994) for the benefit of the Essex County Greenbelt Association

Herbert Farnsworth Fund (1994)


Gaywest Farm Fund (1994) for the benefit of Capen Hill Nature Sanctuary in Charlton, Massachusetts

General Fund for Preservation of Wildlife and Natural Areas (1994)

Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society

Hollis D. Leverett Memorial Fund (1994) For planting and upkeep of trees, shrubs and other plants which promote and encourage bird life; primarily on land in New England owned or controlled by conservation organizations

Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts


Edward Glines Fund (1938) unrestricted

Elizabeth D. Goldsmith Fund for Families (2010) to support families in the greater Boston area

Haiti Relief and Reconstruction Fund (2010)


Charles W. Happgood Trust Fund (1986) 40% of income received for educational purposes at the Massachusetts Institute of Technology or some similar institution, or for the promotion of health and the alleviation of suffering at Massachusetts General Hospital or some similar institution

Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the homeless

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) income to be used “in part” for hospitals, education and the improvement of American citizenship

Nathaniel Hooper Fund (1938) unrestricted

Grace A. Jacobs Fund (1988) unrestricted

Jacoby Club of Boston Fund (1984) to provide kindly, personal help and concern for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances
Jamaica Plain Dispensary Fund (1962) for the benefit of poor people in or near Jamaica Plain, particularly for health related needs

Charles Frederick Joy and Dora Marie Joy Fund (1992) income to be used for summer vacations for two worthy Protestant girls and one boy and any excess income shall be used to help in the care of sick Protestant children or Protestant girls or women

Kellogg Foundation Fund for Haiti (2012)

Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2006) unrestricted

Edith Shedd Larsen Fund (1962) to the extent feasible 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 committed to maintaining the physical health of the general population as well as targeted populations of the disabled; for cultural and educational enrichment; for those dedicated to preserving and defending the Constitution; and the Azad and Doris Maranjian Humanitarian Award given to any outstanding individual who has demonstrated an ability to further ennoble the human species and the human spirit

Massachusetts Civic League Fund (1983) to promote sound government

Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes

Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women

Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease

Grace G. North Fund (1954) for aid to needy gentlewomen

Out of the Blue Grants Fund (2002) for unsolicited and unrestricted Boston Foundation grants made to nonprofits that have outstanding leadership and engage in truly exceptional work

Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) to be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care

Norman Everett Pearl Fund (1996) for recognized charities in the Boston area

Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, nonprofit radio and television stations) providing musical programs

Permanent Fund for Boston (1980) unrestricted

Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River

Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music

David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston’s children

Ruth M. Reiss Memorial Fund (1997) unrestricted

Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea

Harriet Rogers Fund (1990)

Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind

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

Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children

Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people

Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs designed to bring about improvements in adoption procedures

Sophia Snow Fund (1948) for care and support of destitute children of Roxbury

Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions

Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women

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


Robert & Esther Waterston Fund (1981) for the support of the elderly

Nelson E. Weeks Fund (1937) for alleviation of suffering in Boston hospitals

Fanny Wharton Fund (1919) for the relief of sick young women and children

Katherine C. Wheeler Fund (1987) to increase knowledge of good government and for the encouragement of good citizenship

Arthur L. Williston and Irene S. Williston Trust For Education (1953) to provide assistance, educational aid and training at institutions other than usual four year colleges

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

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

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

Special Initiative Funds

The Boston Foundation holds a number of funds that support special initiatives—designed to respond to some of the most pressing challenges facing our community in innovative ways. The year the fund was established is listed in parentheses.

Achieving the Dream Initiative Fund (2007) a multiyear national initiative created to strengthen the ability of community colleges to help students of color and low-income students earn degrees and certificates by using data to close achievement gaps

Action Fund (2010) for unsolicited support of programmatic opportunities or challenges that advance Boston Foundation goals and objectives

After School for All Partnership Fund (2003) for the Foundation’s After School Initiative

Allied Health Fund (2010) for the Allied Health Worker Initiative

Arts Capitalization Technical Assistance Fund (2010)

Boston Community AIDS Partnership Fund (1993) for prevention programs which target high-risk populations in Greater Boston—specifically communities of color

Boston Indicators of Change, Progress and Sustainability Project (1998) to examine Boston’s strengths and challenges that impact the quality of life of people who live and work in the City of Boston

continued on next page
Special Initiative Funds continued

Boston Opportunity Agenda (2010) for a public/private partnership to ensure that all Boston residents have the support they need to achieve educational and economic mobility and secure, satisfying lives

Catalyst Fund for Nonprofits (2009)

CHAMPS Boston (2009)

Civic Leadership Fund at the Boston Foundation (2002) to raise outside contributions in support of annual expenses associated with the Foundation’s expanded role as convener and host of major community forums which promote the civic health of our region

Community Foundation Global Giving Network (2012) for an initiative to help community foundations across the United States meet the international giving interests of their constituents. This pilot, of which TBF is a member, is managed by TPI’s Center for Global Philanthropy.

Culture for Change (2012) to support out-of-school time artist residency programs in Boston, with an emphasis on marginalized/under-resourced communities that build a shared understanding of the current political, cultural, and social context to support youth development and social justice through the creation of art; and to promote and recognize the value of artists and their work

Designing Schools 2.0 Fund (2011)

English for New Bostonians Fund Phase III Fund (2008) for support of meeting the ESOL Demand program

Fairmount Cultural Corridor Fund (2012) to advance a vision for the Fairmount corridor (Roxbury, Dorchester and Mattapan) that elevates local cultural assets and the ethnic traditions of residents

Fund for Racial Justice Innovation (2003) to strengthen partnerships between community-based organizations and lawyers that use legal tools to advance equity resource distribution for communities or groups marginalized by race, color, ethnicity or immigration status

Healthy People/Healthy Economy (2012) to make Massachusetts a national leader in health and wellness by addressing the crisis in preventable chronic disease through a primary prevention approach that will improve lives and help curtail health care costs

High Risk Youth Fund (2007) to build the capacity of Boston-area youth-serving networks and their member organizations to advance positive educational, social and workforce outcomes for high-risk youth through public policy action

Home Funders Fund (2002) to help increase the supply of housing affordable to families whose income is below 30 percent of the area median income

Homelessness Prevention Initiative (2005) to champion the cost-effective strategy of prevention, employing a multi-pronged approach that seeks to demonstrate the effectiveness of a spectrum of programs

Innovative Schools Initiative Fund (2010) for grants under the Foundation’s Pilot Schools Initiative

Neighborhood Preservation Initiative Fund (1995) for community development in East Boston

New England International Donors (2012) for an affinity group and resource for international donors with a mission to increase the impact of international philanthropy originating from the region. This initiative is managed by TPI’s Center for Global Philanthropy.

Polaroid Fund (1997) to help children and adults become more independent and realize their full potential as successful members of society

President’s Initiative Fund (2002) to create the President’s Initiative Pre-Development Program Fund

Program Related Investments Fund (1990) for program related investment loans

SkillWorks Fund (2001) a partnership between several local and national funders to focus on job training for disadvantaged job seekers

StreetSafe Boston (2010) to work in partnership with other funders and organizations to combat youth violence in the City of Boston

Success Boston (2008) to increase the college graduation rate for low-income, minority and first generation college students from public schools in Boston

United Way Millennium Fund for Children and Families (1999) an endowment partnership with the Boston Foundation:

- Vision Fund (1994) for small grants to community organizations for planning, development and training
- Wallace Foundation Fund (2007) to coordinate knowledge sharing activities among the Wallace Foundation Excellence Awardees in Boston
Designated Funds

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

1819 Greek Revival Renewal Fund (2011) to support construction and renovation projects at the Cathedral Church of St. Paul (Episcopal)

Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston

Lucy Kasparian Aharonian Memorial Scholarship Fund (2007) for scholarship awards to the Armenian International Women’s Association, Inc.

Rae and Aaron Alberts Foundation Fund (2002) to be distributed annually in equal amounts to: the Carroll Center for the Blind, the Perkins School for the Blind, the Vinfen Corporation, the Jewish Family and Children’s Services, and the New England Sinai Hospital

Rae and Aaron Alberts Foundation Fund II (2005) to be distributed annually in equal amounts to the Salvation Army, the American Kidney Fund, the American Cancer Society, Children’s Hospital of Boston, Massachusetts General Hospital, Combined Jewish Philanthropies of Boston, and the Massachusetts Special Olympics Association

All Hands Volunteers Sustainability Fund (AHVSF) (2012) for support of All Hands Volunteers

Alzheimer’s Disease Research Foundation Fund (2005) for the Alzheimer’s Disease Research Foundation

Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals

Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs

Arts Awareness Fund (2005) to connect visual artists to opportunities to serve our community’s social service agencies and other constituencies

Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston

Lilian G. Bates Fund (1951) for three named agencies

Be the Change Fund (2007)

Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts

Boston Ballet – E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet

Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association

Boston Baroque Fund (2003) for general operating support of Boston Baroque

Boston Lesbian & Gay Communities Funding Partnership Fund (1994) for efforts to plan and implement a process to address gay and lesbian issues on an ongoing basis within the Greater Boston area

Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.

Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings

Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College

ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation

BPE/Current Use Fund (1985) for current use project funding

BPE/Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation

MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation

BPE/Public Education Fund (1985) for staff salaries of the Boston Plan for Excellence in the Public Schools

BPE/Support for Early Educational Development Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation, Inc.

Herbert Brandshaft Scholarship Fund (2007) to support the Herbert Brandshaft Scholarships at the MATCH School to help deserving students from low-income families pursue a college degree in the fields of mathematics, science, engineering or computer science

Annie L. Breckenridge Trust Fund (2000) for the benefit of the Massachusetts Society for the Prevention of Cruelty to Animals and the Mary Lane Hospital Association

Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition


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

Agnes T. Carruth Fund (1983) To the Kind Edward VII Memorial Hospital, to be used in whatever manner the governing body of said hospital shall see fit, but preferably for the care and treatment of persons suffering from asthma

James F. Casey Fund (1949) for seven named agencies

Alex Castoldi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students

Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose

Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy

Philip P. Chase Fund (1955) for five named agencies

Julia Child Fund (1979) for fellowships to support professional study, research, writing and teaching related to food, wine and the culinary disciplines, with preference to those planning to study in France

Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted

Committee to Light Commonwealth Avenue Mall Fund (2011)

Cutler Family Education and Animal Welfare Fund (2011) to support the Museum of Science, Cape Ann Animal Shelter and Cold Spring Harbor Laboratory

Ernest & Vera Clivio Charitable Memorial Fund (1981) for the benefit of two named agencies

Elizabeth Cook ACF Student Fund (1997) to provide short-term funds to students associated with the Ad Club Foundation

Almon B. Cook-Relief Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester

Thomas G. Curtin – Bobby Kargula Nanae Fund (2009) to promote cultural and educational exchange programs to support the sister city relationship between Concord, Massachusetts, U.S.A. and Nanae Town, Hokkaido, Japan

continued on next page


Designated Funds continued


Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra concert series to young people in the New England area

Duggan Charitable Fund (1998) for Canton High School


Douglas A. Eaton Memorial Fund (1962) for scholarships to members of the graduating class of Hingham High School

Michael Elliot Fund for the Arts (1992) To provide scholarships & fellowships for students of the fine arts with preference to those studying in the field of sculpture.

William V. Ellis Fund for Our Lady of Good Voyage Carillon (2011) English High School Class of 1934 Award Fund (1994) for a scholarship to a Boston English High School student with preference given to students who show marked improvement and particularly those who are succeeding in spite of adverse circumstances

English High School – John Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School

Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008) to support the Gustavus John Esselen Award for Chemistry in the Public Interest as outlined in the organizational by-laws of the Northeastern Section of the American Chemical Society, Inc.

Philip M. Fagan Family Fund (1971) for Combined Jewish Philanthropies of Greater Boston

Paul R. & Jacqueline D. Fehrenbach Family Fund (1999) for Junior Achievement of Eastern Massachusetts

Benjamin M. Feinberg Fund (1962) for Hebrew College

Arthur Fiedler Esplanade Concerts Fund (1980) for the support of free concerts on the Esplanade

Food and Fuel Fund (2008)

Felix Fox Memorial Fund (1974) for the Community Music Center of Boston

Americo Francisco Fund, Estate & Realty/Charitable Trusts (1998) for the benefit of thirty named charities

Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy

John & Ethel Goldberg Fund I (1984) for the benefit of Brandeis University and West End House, Inc.

John & Ethel Goldberg Fund IV (1984) for support of eye retina research and related eye research technology

John & Ethel Goldberg Fund V (1984) for the continuing professional education of Massachusetts judges in subjects directly pertinent to the performance of their judicial and administrative duties

John & Ethel Goldberg Fund VI (1984) for Suffolk University Law School for the “needs of the law school with respect to scholarship and maintenance or renovations to the buildings housing the law school”

Barbara W. & Frank B. Gopen Fund (1978) for the benefit of Massachusetts General Hospital and the Arthritis Foundation

Walter W. Gove Fund (1972) for two named agencies

Elizabeth Grant Fund (1980) for five named agencies

Greatrex Scholarship Fund (1988) for scholarship awards to Foxborough Massachusetts students who are in need of financial aid to attend college, trade school or nursing hospital

Rosario Fajardo Hagan Fund (1991) for the Life Experience School

Patricia Jellinek Hallowell Fund (1992) for support of the Patricia Jellinek Hallowell Scholarship Fund at the Museum School, Museum of Fine Arts

Hastings-Plummer Fund (1940) for Crittenton Hastings House of the Florence Crittenton League, in part for special purposes

Benjamin Patrick Hermann Fund (2002) for the New England Conservatory’s efforts to recruit accomplished cellists to teach cello master classes in the extension division

Jorge N. Hernandez Fund (1987) for support of the Jorge N. Hernandez Cultural Center

Gertrude Hooper Fund (1996) for benefit of the Crime and Justice Foundation

Madeleine C. Huiginn Fund (1993) income to be added annually to principal

Blanche Hyslop Fund (1982) to three named agencies

Orchestra of Indian Hill Music Director Fund (2002) Annual distributions will be made to the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra’s conductors’s chair ($30,000 per year until the fund is depleted)

James W. & Margaret A. Ingraham Charitable Fund (1992) for the benefit of five named agencies

Ella Jackson Artists and Scholars Fund (1982) for the Truro Center for the Arts on Castle Hill

Patrick F. Jones, Jr. Endowment Fund (1981) for the benefit of the Lena Park Community Development Project

Donaldson F. Jones Fund (1999) for the benefit of Massachusetts General Hospital / The Claude E. Welch Surgical Research and Education Fund

William & Sean Kelley Scholarship Fund (2010)


Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School

Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA

Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society

Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)

Gerald V. Levrault & Claire H. Levrault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England

Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine

Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation

Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts

John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution

Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency. Currently the program is the “Short Stop” of Somerville, MA

Harry D. Neary Fund (1950) for five named agencies


New England Women’s Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women’s Club Memorial Lecture Series, devoted to the discussion and study of women’s history in Boston

Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science’s Internship Program
Nixon Peabody Scholarship Fund in Recognition of Retired Managing Partners (1997) for scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs

Oak Foundation – Home Funders Fund (2007)

Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school

Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts

Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library

William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning

Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center’s Scholarship Program

Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post secondary vocational education

Charles & Cornelia Pfaff Fund (1964) for four named hospitals

Emma K. & Richard Pigeon Fund (1955) half of income for three named agencies on Cape Cod and half unrestricted

Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors

Pooled Income Administrative Fund (1988) from the Lilly Endowment, Rockefeller Brother’s Fund and State Street Bank & Trust Company. For the administration of the Planned Giving Partnership

Primary Care Fellowship Program Fund (1983) to support Harvard Medical School’s program of preparing general internists for academic careers


Reading Visiting Nurse Association Fund (1976) for the Combined Visiting Nurse Association of North Reading, Stoneham, Wakefield and Woburn, Inc. for its work in Reading

Rogers Fund of the Riverside Cemetery (1997) to preserve and maintain the Rogers Mausoleum structures and grounds at the Riverside Cemetery in Fairhaven, Massachusetts

Henry A. Root Fund (1926) for the Service Pension Society of the Unitarian Universalist Association

Rose Fund (1981) for the Carol Rabb Goldberg Seminars for Urban Problems at Tufts University

Fund for Rosie’s Place (1984) to benefit Rosie’s Place

Bessie H. Short Fund (1997) for the benefit of elderly residents of the Town of Wrentham, Massachusetts

Dana P. & Maude E. Simpson Memorial Fund (1998) half of the income for seven named agencies and the other half unrestricted


Social Law Library Endowment Fund (1982) for the support of various library programs

Michael Spock Community Service Fund (1980) for support of the Children’s Museum outreach services for the Boston community

Alison L. Stevens Fund (1976) for two named agencies

Miriam & Sidney Stoneman Fund (1984) to benefit Boston Symphony Orchestra youth activities

Surfmen’s Trust Fund (1977) for the Coast Guard Mutual Assistance Fund

Agnes & Lewis Taylor Fund (1962) for the Orleans United Methodist Church in Orleans, Massachusetts

Margaretta Taylor Animal Medical Center Fund (2009) for the Animal Medical Center

Margaretta Taylor Fund for Brooks School (2009) for the Brooks School

Margaretta Taylor Eaglebrook School Fund (2009) for the Eaglebrook School

Frank B. Thayer Fund (1976) for three named agencies, but one-fourth of the income unrestricted

Pauline Toumpouras Fund (2010) AMB to benefit the Greek Orthodox Chapel and Center, Brookline, MA

Robert E. Wallace Memorial Fund of the Urban League (1992) to support professional development activities of the Urban League of Eastern Massachusetts, emphasizing programs for youth and education


Inez Washabaugh Ward, PNP, Scholarship Fund (2011) to provide grants to the Summer Fund at Associated Grantmakers (or its successor or suitable alternative agencies) for the purpose of supporting camp scholarships for boys and girls, especially patients of the South End Community Health Center where Ms. Ward was the Pediatric Nurse Practitioner for thirty-four years

Bradford Washburn Fund (1980) for support of community services of the Museum of Science

Bill and Estelle Watters Fund (1997) for three named agencies

Jane Wengren Fund (1979) for the benefit of the Center for International Visitors of Greater Boston

Stetson Whitcher Fund (1986) to benefit eight named agencies

Ernesto “Tito” Whittington Scholarship Fund (2007)

May J. Wikstrom Fund (1998) to support eye retina research

Rudolph & Sara Wyner Prize Fund (1985) to the New Israel Fund for a prize award (paid every fifth year) to an organization that has made a significant and positive contribution to mutual cooperation and reconciliation among Arabs and Jews in Israel
Donor Advised Funds

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

63 Marlborough Street Fund (1984)
AADS Memorial Fund (2004)
Walter and Alice Abrams Family Fund (2005)
Maida & George Abrams Fund (1985)
Abromowitz /Ruttenberg Family Fund (2000)
Acacia Fund (2004)
Ad Club Foundation Fund (1987)
Adler Family Fund (2006)
Adlib Foundation (2010)
Affinity Services Corporation Fund (2003)
James F. Alenson Memorial Fund (2007)
Aley Fund (2009)
Aliad Fund (1993)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1995)
Ames Foundation Charitable Fund (2009)
George and Nedda Anders Fund (1991)
Carol and Howard Anderson Family Fund (1997)
Barbara Jane Anderson Fund (2000)
Selma and Bayness Andrews Fund (2006)
Michael & Ellen Angino Fund (1997)
Anony Fund (1998)
Ansara Family Fund (2006)
Anthropologists’ Fund for Urgent Anthropological Research (1996)
APOC Fund (2011)
Arba Lifnot Boker Fund (1992)
Armony Erel Charitable Fund (2008)
Atlantic Fund (1997)
Kathryn and Charles Avison – Miriam Avison Charitable Fund (2005)
Susan M. Aynarn and Michael R. Aynarn Charitable Donation Fund (2012)
Katharine & George Baker Fund (1987)
Balzer /Bellinger Fund (2007)
Baudanza Family Fund (1997)
Beachcomber Fund (2008)
Belinda Fund (2011)
Bellevue Fund (1999)
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)
Bither Charitable Fund (2012)
Linda Cabot Black Fund (1983)
Emmanuel and Jane Blitz Fund (1992)
Tom and Lisa Blumenthal Family Foundation (2005)
Joan T. Bok Fund (1997)
Boston City Hospital Social Service Fund (1981) for medical social treatment, including rehabilitation, of needy patients of Boston Medical Center; for training costs and other costs of social work students in the Boston area
Braverman Family Fund (1992)
Bronner Charitable Foundation (2006)
Brooke Family Donor Advised Fund (2007)
Peter A. Brooke Fund (1998)
Buckman Fund (2010)
Dean Bullock Family Fund (1997)
Denise A. Burgess Fund (2002)
Bill and Barbara Burgess Fund (2002)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1988)
Kairos Butler Fund (1994)
Butler’s Hole East (2011)
Butler’s Hole Fund (1994)
Butler’s Hole North (2011)
Butler’s Hole South (2011)
A. Bruce Campbell Fund (2002)
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)
Diversity Training Fund (2010)
Dodson Family Charitable Fund (2007)
Doe Noordzij Fund (2001)
Drake Center Fund (2002)
William J. Ducas Charitable Fund (2011)
Eagle Bank-Frank E. Woodward Scholarship Fund (1985) for scholarships for Everett residents
Margaret Eagle Foundation Fund (2000)
Echo Rock Fund (2000)
Edgerley Family Fund (2012)
Egozy Fund (2006)
Eisenson Family Fund (2005)
Elliot and Yu Education Fund (2012)
Ellis Family Fund (2003)
Endowment for Children in Crisis (1991)
Gerald Entine Family Trust Fund (2008)
EqualLogic Foundation Fund (2008)
Ethics Trust Fund (1993)
Evans Family Fund (1999)
Norris & Constance Evans Charitable Fund (1999)
Excalibur Fund (1999)
Peter and Ellen Fallon Fund (1997)
FARM Fund (2006)
Carol Fazio Charitable Fund (2010)
Ferdinand Fund (2000)
FISHER Charity Fund (1999)
Fishreys Family Philanthropic Fund (1999)
John Da Silva Memorial Fund (1988)
John H. Deknatel Family Fund (2009)
Sarah Derby and Gary MacDonald (2007)
Rebecca Derby and Evan Morton (2007)
DeWolfe Family Fund (2000)
Larry DiCara Fund (2006)
Chasin/Gilden Family Fund (2000)
Charles Ezekiel and Jane Garfield Cheever Fund II (2006)
Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative
Joyce Chen and Helen Chen Foundation Fund (1995)
Chertavian Family Fund (2005)
Chevron Fund (1980)
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) priority given to organizations which support grassroots organizing for social change
Civic Engagement Fund (2010)
CJE Foundation Fund (2007)
Clark Family Fund (2010)
Clarke Fund (1987)
Cohen/Lucas Fund (1999)
Coit Family Fund A (2001)
Colby Charitable Fund (1980)
Colon Road Fund (1997)
Condor Street Fund (1988)
Joette & John Cook Fund (1986)
Constance and Lewis Counts Fund (1990)
Coolidge Family Fund (1982)
Cooper Leeser Family Fund (1997)
William & Susan Copeland Fund (1990)
Corveli Fund (1996)
Jessie B. Cox CLT – Cox Family Fund (2009)
Crane Fund (2012)
Cregan Charitable Fund (2005)
Crosby Family Fund (2000)
Kate Crozier Fund (2007)
Tarrant and Laura Cutler Charitable Gift Fund (2008)
Dainger Fund (1997)
Darling Family Fund (1983)
Joan Da Silva Memorial Fund (1988)
John H. Deknatel Family Fund (2009)
W. Deknatel Charitable Fund (2009)
Sarah Derby and Gary MacDonald (2007)
Rebecca Derby and Evan Morton (2007)
DeWolfe Family Fund (2000)
Larry DiCara Fund (2006)
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<th>Donor Advised Funds continued</th>
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- Dave Garroway Fund (1982)
- 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 Family Fund (1985)
- John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine
- Carol R. & Avram J. Goldberg Fund (1983)
- Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
- Goodworks Fund (2002)
- Gordon Educational Fund (2001)
- Gordon Place Charitable Fund (2012)
- Sandra & Philip Gordon Family Foundation Fund (2001)
- Gravelly Springs Fund (2005)
- Green Fund (2011)
- Tim and Carolyn Grimes Charitable Fund (2011)
- Patricia H. Gross Fund (1999)
- Gualala Fund (1991)
- Guenzel-Pieters Family Fund (2008)
- Mary Haas and Ronald Leavitt Donor Advised Fund (2001)
- Haiti Sustainable School Fund (2012)
- Ken and Becky Hansberry Fund (2001)
- George Harrington Trust Fund (1983)
- Charlotte C. Hart Family Fund (2001)
- James E. Hayden Charitable Fund (2001)
- HEIRS Fund (1996)
- Fred Henning Fund (1989)
- Henry Fund (1986)
- John P. Herrick Fund (2009)
- Petie Hilsinger Fund (1999)
- Hoffman Fund (1986)
- Holberger Family Fund (1993)
- Holland Family Fund (1993)
- Holtzman Fund (2009)
- Emily C. Hood Fund (2011)
- Gilbert H. Hood Family Fund (1980)
- Hourless Fund (1997)
- Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham
- Hunt Fund for Children (2001)
- Interstitial Fund (2009)
- J. Jill Compassion Fund (2002)
- Jade Fund (2007)
- JAHHELBE Fund (2002)
- Japanese Disaster Relief Fund (2011)
- Hope and David Jeffrey Fund (2011)
- Jochkan Charitable Fund (2001)
- Elizabeth Trichel Joyce Family Fund (2007)
- Louis and Marcia Kamentsky Donor Advised Fund (2010)
- Beton M. Kaneb Fund (1983)
- Steven E. Karol Charitable Foundation (1999)
- Kassler Family Fund (2008)
- Keewaydin Fund (2001)
- Keogh Family Fund (2000)
- Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
- Kindling Fund (2011)
- KJN Family Fund (1997)
- Kluchman Family Fund (1997)
Klureza Family Fund (1997)
Stephen P. Koster Fund (1985)
Kravitz Family Fund (1993)
Gregory and Deborah Laham Family Charitable Fund (2011)
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)
Lawrence Family Fund (2009)
Roger & Clarissa Lee Family Fund (2009)
Thomas E. & Barbara B. Leggat Fund (1986)
C. Martin Leinwand Fund (1986)
Colman & Carol Levin Fund (2000)
Levitt Family Fund (2000)
Lewis Family Fund (2007)
Charlotte Ruth Lewis Fund (1998)
Henry R. Lewis Family Fund (2007)
Southard Lippincott Fund (1996)
Lissy Family Fund (2008)
LMG Fund (1997)
Marjorie L. and James M. Lober Fund (2010)
LOC Fund (2009)
Joan Locatelli Foley Memorial Fund A (1997)
Joan Locatelli Foley Memorial Fund D (1997)
Longfield Family Foundation (2011)
Loomis Sayles Charitable Fund (2007)
Lord-Buck Fund (1996)
Bruce Lunder Fund (1982)
Donald J. & S. Kelley MacDonald Charitable Fund (1998)
Magic Penny Fund (1997)
Mann Family Fund (2010)
Margaret Hixon Fund (2007)
Evelyn A. Marran Fund (1983)
Martin Fund (1998)
Mason-Brown Fund (2008)
Match School Scholarship Fund (2007) for Match School scholarships
May-Clain Charitable Gift Fund (2012)
Eric and Sue May Charitable Fund (2012)
Mayel Fund (1982)
William and Linda McCabe Fund (1994)
Eleanor P. McIntyre Fund (2001)
McNeill Family Fund (1997)
McSweeney Family Charitable Fund (2009)
Medical Research Fund (1992) to support medical research in the fields of endocrinology and/or nuclear medicine
Mellowes Fund (1998)
Leila Yassa & David Mendels Fund (2000)
Meyer Foundation (2006)
Allan Meyers Fund for the Advancement of Careers in Disability (2000)
Michon Family Fund (1986)
Microsoft Unlimited Potential Fund (2005)
Anita L. Mishler Education Fund (1983)
Moccasin Brook (2000)
The Modi Family Pass The Luck Foundation (2012)
Monadnock Fund (2002)
Mormann Family Fund (2006)
Andy Morris and Lynne Salkin Morris Family Fund (2011)
Muddy Pond Trust Fund (1994)
David G. Mugar Fund (1998)
Munger Family Fund (2001)
Murchison/Silvia Charitable Gift Fund (2009)
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)
Jean F. and David G. Nathan Fund (1986)
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)
Ones Fund (2004)
Richard T. O’Rourke Fund (1988)
Orpheus Fund (2002)
Morgan Palmer Charitable Fund (1982)
Parker Family Fund (2000)
Field Parker Fund (1996)
Partnership Fund in honor of Anna Faith Jones (2001)
Payne’s Creek Fund (2001)
Payson Family Fund (2000)
Perkins Grant Fund (1996)
Samuel Perkins and Nancy Reed Fund (1996)
Sheila and Sara Perkins Fund (1996)
John & Lydia Perkins Fund (1999)
Donor Advised Funds continued

Permanent Housing Fund (1989)
Roger Perry Memorial Fund (1999)
Peter Fund (2000)
Petersen Family Fund (2001)
Kevin Phelan Fund (2004)
Philacon Fund (1990)
Picard Family Fund (2000)
Jamie Pierce & Rick Creswell Fund (2002)
Plimpton – Shattuck Fund (2005)
Stephen and Sharon Plumeri Fund (1994)
Poler Family Charitable Gift Fund (2008)
Pool Family Fund (1997)
Poss-Kapor Family Fund (1996)
Pride in Scholarship Fund (1992) for scholarships to students whose academic work & individual contributions to the arts, sciences or business best serve & promote the gay & lesbian community
Fred & Ruthann Prifty Fund (2001)
Primary Care Progress Fund (2011)
Thomas & Mary Prince Family Fund (2000)
Project Shelter Pro-Am Fund (1991)
Sue and Bernie Pucker Fund (2002)
Donald and Frances Putnoi Charitable Fund (2006)
Peg Pyne Fund for Handicapped Access (1985) to make congregations accessible to handicapped worshipers
Quid Nunc Fund (2001)
Sidney R. & Esther V. Rabb Family Fund (1983)
Radtke Family Fund (1996)
Gene Record Fund (2002)
Sara Delano Redmond Fund (1996)
Remmer-Fox Family Fund (1995)
Reno Family Charitable Foundation (1998)
Riptide Fund (2002)
Jonathan Rizzo Memorial Foundation Fund (2001)
Thomas Roberts Fund (1995)
Brian D. Robertson Foundation Fund (2012)
Robynhood Thanksgiving Fund (2002)
Rosedune Fund (1970) especially for educational and cultural programs, primarily for children
Rosen Family Fund (2008)
Lindsey A. Rosen Fund (2011)
Daniel and Brooke Roth Charitable Gift Fund (2007)
Rotman-Attardo Family Fund (2005)
Dr. Jordan S. Ruboy Charitable Fund (1998)
Rust Bowl Fund (1987) for the benefit of cultural arts, including theatre
Salmon Family Charitable Fund (2006)
David Salten Fund (2007)
Risha C. and Paul A. Samuelson Fund (1982)
Sands Family Fund (2011)
Kazanjian Sargeant Fund (1996)
Schawbel Family Fund (1995)
Schott Fund (1999)
Schumann Family Fund (2005)
Schwinn Family Charitable Foundation (2011)
Stephen Sears and John Lavryssen Fund (2009)
September Fund (2000)
Norman and Maryellen Sullivan Shachoy Fund (1997)
Shames/Egasti Fund (1991)
Shapiro/Fleishman Fund (1999)
Shawkemo Fund (2000)
Sherman Family Foundation Fund (2005)
Jon Shevell Cancer Fund (2010) to make grants to qualified charitable organizations that are dedicated to the treatment, prevention, or research of cancer
Jon Shevell Children’s Fund (2010) to make grants to qualified charitable programs that are serving orphans (defined as children and young people whose parents are deceased or unable to take care of them)
Jon Shevell Education Fund (2010) to make grants to qualified Jewish religious or educational organizations
Shields Family Fund (2006)
Shoe Box Foundation Fund (2004)
Jean Karpas Siegel Fund (1994)
John and Susan Simon Boston Foundation Fund (2007)
June L. Simons Fund (1997)
Sixty-Nine Roses Charitable Foundation (2011)
Fay Slover Fund (2010)
Skylight Fund (2000)
Ellin Smalley Fund (1987)
Austin & Susan Smith Fund (1999)
Timothy Smith Fund (1995)
Julian & Anita Smith Fund (1981)
J. Alper Smith Fund (1996)
Nancy and George Soule Family Fund (1997)
Spector Fund (2001)
David F. Squire Family Fund (1997)
Staufenbiel Aley Fund (2009)
Harvey & Shirley Stein Fund (1999)
Stewart Fund (2006)
Tracy Stewart Fund (2009)
Stonehill Enrichment Fund of the Ames Free Library (1994)
Charles Sugnet Fund (1998)
Joshua Sugnet Fund (1998)
Suhrbier Family Fund (2005)
Sunrise Fund (1993)
Sykes Moyer Fund (2005)
Sylvan Fund (1985)
Davis & John I. Taylor Trust Fund (1983)
Tempero Family Fund (2002)
Marc C. Thompson Family Fund (2008)
Thomsen Family Fund (2000)
Susan and Michael Thonis Fund (2005)
Thorvale Fund (2007)
ThreeBees Fund (2012)
Topol Family Fund (1991)
Norman E. & Sandra Curry Toy Fund (1985)
Trefler Fund (1997)
Tye Charitable Fund (2006)
Unity Foundation Fund (1995) for funding of nonprofit organizations serving the African-American community
Lisa and Bill Vanderweil Charitable Fund (2010)
Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter
Vizzini Fund (1997)
M. Volpe Kluchman Fund (2005)
JH & EV Wade Fund (1990)
James and Margaret Wade Fund (1997)
S & D Walden Charitable Fund (1986)
Walker Fund (1998)
Walsh Brothers Foundation (2010)
Ruth & Henry Walter Fund II (2010)
J. H. Walton Family Fund (1986)
Max Warburg Fund (1992)
 Wasserman Fund (Terminated Fund) (1986)
Waterfield Fund (2002)
Anita Barker Weeks Charitable Gift Fund (2011)
Wellesley Hills Congregational Church Outreach Fund (2007)
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)
Winkler Family Foundation Fund (2001)
Samuel Lee Winship Fund (1998)
Wesley L. Winship Fund (1998)
Jesse Winship-Freyer Fund (1998)
Winsor Foundation Fund (1989)
Howard L. Wolf Memorial Fund (1981)
Women’s Fund (1982)
Karin E. Wood Fund (1993)
Fund for World Class Schools (2007)
Wyett Family Fund (1988)
Zabin Charitable Fund (2001)
Sylvia and Robert Zell Fund (1988)
Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals
Zug Family Fund (2008)

Support Organizations and Other Special Funds

Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the communities of Harvard, Ayer, Groton, Pepperell, Shirley and Townsend

Deshpande Foundation (2007)

Horace Moses Foundation (1995) to support Junior Achievement

James M. and Cathleen D. Stone Foundation (1994)
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Photo on page 4 of Brother Thomas Fellows by Angela Rowlings

Photo of microbiologists on page 9 is by Jaco Wolmarans | iStock photo

Thanks to The Greater Boston Food Bank for permission to take the photo on page 20 of a “Kids Café” at the Chelsea Boys and Girls Club: the Gerald and Darlene Jordan Club/Kraft Family Center

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