CLOSING BOSTON’S EQUITY GAP

FOR SOME COMMUNITY LEADERS AND ACTIVISTS, IT’S NOT JUST A MOMENT. IT’S A MOVEMENT.
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**The Conversation Continues**

The brief copy included in this publication are summaries of rich and lengthy interviews, all of which were transcribed.  
We invite you to read the full transcripts at [www.tbf.org/2021](http://www.tbf.org/2021).
The Boston Foundation, founded in 1915, is one of the oldest and largest community foundations in America. By partnering with community members, donors, the public sector, businesses and nonprofits, we serve as a civic leader for our city and region. In this role, we publish research into the most critical issues of our time, convene large groups of people to discuss the city’s agenda—and use our shared knowledge to advocate for public policies that promote equity and opportunity for everyone. The Boston Foundation is also one of the largest grantmakers in New England, providing support to nonprofit organizations in Greater Boston through our endowment and working closely with our donors to support nonprofits locally, nationally and internationally.
This year has been one of transition for the Boston Foundation.

We honored the legacy of Paul S. Grogan, who served as President and CEO for the last 20 years, and welcomed M. Lee Pelton, our new President and CEO. These changes took place during one of the most challenging years in the history of our city and of the Boston Foundation, which was founded in 1915, just three years before the last pandemic.

The Foundation is deeply committed to closing Boston’s equity gap, the topic that is explored through the articles in this annual report. We hope you will be heartened by reading about the remarkable progress that has been made during these unparalleled times—and the ideas and dreams of those who plan to build on that progress to accomplish so much more.

Linda Mason  
Chair

T.J. Rose  
Vice Chair
I was educated here, and it is one of the cities which I call home. I come here not to condemn, but to encourage.

I would be dishonest to say that Boston is Birmingham or that Massachusetts is Mississippi. But it would be irresponsible of me to deny the crippling poverty and injustice that exist in some sections of this community.

The vision of the New Boston must extend into the heart of Roxbury.

Boston must be a testing ground for the ideal of freedom.

—Martin Luther King, Jr.

From his speech on Boston Common in 1965
Introduction

BY OUR PRESIDENT AND CEO

In Boston, despite its best efforts and decades of spectacular growth and prosperity, our City on a Hill continues to be a tale of two cities: one prosperous and well off, the other struggling to make ends meet in one of the nation’s most expensive and economically unequal cities.

The triple pandemic of COVID-19, economic devastation and the very public exposure of systemic racial disparities that have long plagued our country have only thrown these inequities into sharper relief. And while this moment has been extraordinarily challenging for so many, it also has provided us with an astonishing opportunity to rethink, reimagine and reshape Boston for years—if not decades—to come.

In these pages, you will read about community leaders and activists who are finding ways to take advantage of this exceptional opportunity. Some are associated with large organizations, while others are leaders or members of small groups or initiatives. All of them are engaged in innovative, life-changing work. They represent thousands of others who are thinking in new ways during this unique moment in time.

They remind us that, as a city and a country committed to equity and social justice, our hope is that, out of the rich diversity of human experience, we can create communities of learning. Communities of learning made both beautiful and effective by their pluralism. Communities of learning that will turn the tide of human want into a more equitable future.

This is the great American dream. Not the kind of dream that is built on narrow self-interest, but rather a compelling vision of what we can be if we are truly open to the best that is known and thought in the world. The kind of dream that will swing open wide the doors of opportunity—and set the table for all to enjoy life’s bounty.

Over the last year, I’ve often been asked: “Is this a moment or a movement?” It is gratifying to know that for many of the people interviewed for this Annual Report—and for many others not represented here—closing Boston’s equity gap must be more than a moment.

M. Lee Pelton
President and CEO
“Community health centers here and across the country tend to be small nonprofit organizations, have low cash on hand and very thin operating margins,” says Michael Curry, President and CEO of the Massachusetts League of Community Health Centers. “They’re scrambling to get a fair reimbursement for their services and responding to every crisis without the resources to do it. They’re serving communities with duct tape, giving out food vouchers and even giving away clothes. They do all of this because their mission is broad: to address the inequities in their communities.”

Curry says that a number of the long-suffered constraints on community health centers started to change dramatically during the pandemic, when the government realized that those bearing the brunt of the health and economic fallout were exactly the population being served by them. “Put on top of that the social justice moment after the murder of George Floyd, and people are now connecting the dots,” adds Curry. “It’s not just about disparate health outcomes, it’s also about racial justice and the realization of the role systemic racism plays in health.

“The pandemic really shined a light on community health centers in a way I have never seen. The Governor, mayors, public health departments, the philanthropic community, the business community—everyone was calling me saying they wanted to be partners and asking me what we needed. Everyone was also saying that they need to hold themselves accountable to equity and that we all need to deal with the social determinants of health.

“Now, I give speeches at health centers across the country, and I say, ‘We were born for a moment such as this.’ My favorite cry on the streets after the murder of George Floyd was, ‘Nothing about us without us.’ Well, that’s immigrant communities, that’s poor people, that’s Black and Brown folks—that’s community health centers. We need to be at the table, to have a voice in the conversation, and to be aspirational about eliminating racial health inequity in a way that we’ve never seen before. Do we finally embrace the challenge and the risk that comes with eliminating racial injustice in this country? I am hoping and praying that we do just that.”
Michael Curry at the Whittier Street Health Center, which was the health center he went to as a child.

FIFTY-SIX PERCENT OF HEALTH CENTER PATIENTS ARE PEOPLE OF COLOR, INCLUDING IMMIGRANTS, MANY OF WHOM ARE UNDOCUMENTED. HEALTH CENTERS RELY ON MEDICARE AND MEDICAID FOR 80 PERCENT OF THEIR BUDGETS.
Dr. Alister Martin (above right) at a popup vaccination clinic in East Boston Health Center and with his GOTVax team outside. Martin created GOTVax to support a more equitable vaccine rollout through hyperlocal popup clinics in underserved neighborhoods. (In circle) GOTVax bandages encourage people to register to vote, inspired by another program Martin launched, called Vot-ER. Martin is now serving for a year as a White House Fellow to create programs promoting health equity.
Dr. Alister Martin is on the faculty of the MGH Center for Social Justice and Health Equity at Harvard Medical School. He has developed several special initiatives, designed to increase health equity in Boston and nationally. The most recent, GOTVax, has vaccinated thousands of people in underserved neighborhoods and was supported by the Boston Foundation and other funders. He says that the unifying thread between all of the initiatives is a deep compassion for the people you’re trying to serve.

“If you really respect people,” he explains, “you will go out of your way to build systems and structures and programs that deeply honor the challenges they face. Think of someone who is working three jobs and trying to take care of their young family while worrying about money and how their immigration status might be compromised if they get a vaccine. An invitation to go to a vaccination site before it closes at 5pm without any assurance that the vaccines won’t cost anything or trigger an ICE investigation just doesn’t solve their problem. You have to create systems, structures and programs that meet people where they are.”

For Martin, the ideal public health infrastructure of cities would be made up of community organizers who are from the communities most impacted. “That is not what we have right now,” he asserts. “We have a gutted public health system that really struggles to do even basic things. Funding for public health needs to be increased dramatically and we need to organize with people who are from the affected communities from day one—not roll out a policy and then later say we should have done this through a health equity lens.”

Martin thinks everyone has a role to play in advocating for specific policies, greater funding and policy interventions that make it easier to do this work of health equity. “Philanthropy can support advocacy, community organizing and mobilizing around specific causes as they come up,” he says. “Funders need to support individuals, groups and organizations that are out there building people. And that takes investment, time and patience. If we truly want what’s best for communities like East Boston, Chelsea or Mattapan, what we need to do is build the people—build leaders—in those communities.”

“Funding for public health needs to be increased dramatically and we need to organize with people who are from the affected communities from day one—not roll out a policy and then later say we should have done this through a health equity lens.”

— Alister Martin
High construction costs, increasing property values, zoning restrictions and limited public subsidies. According to Rafael Mares, Executive Director of The Neighborhood Developers, these are all factors that make it hard to build sufficient affordable housing in Greater Boston. “It takes roughly $500,000 to construct just one apartment,” he says, “so, already it’s not affordable. In order to make it economical, you have to reduce that number by subsidizing the cost of development and providing some rental assistance for tenants.”

Mares points out that federal funding for affordable housing has shrunk over the years. “But we are in a better position now,” he adds, “because we have federal and state administrations eager to invest in affordable housing and new opportunities with ARPA funding.”

Mares’ organization uses both preservation and new construction to meet its housing goals. A couple of years ago, when a 32-unit building in Chelsea came on the market, The Neighborhood Developers purchased it to keep the units affordable. “Because you have to act quickly—before for-profit developers snatch it up—access to low-interest capital is needed for preserving affordable housing. The systems for creating new affordable housing, on the other hand, are much more thought through and well-traveled. The Neighborhood Developers recently finished a new 51-unit building just steps from Revere Beach. They’re the only affordable homes among more than 2,000 market-rate units recently added near the waterfront,” says Mares. “At the ribbon cutting, all of our local, state and federal partners, investors, architects, contractors, lawyers, engineers, lenders and consultants came together. It takes a village to build affordable housing.

“We have people with lived experiences in our communities now educating themselves about policy challenges and solutions. They’re the ones who need to determine what makes sense to pursue going forward. The housing crisis is a systemic problem. We can’t simply build our way out of it. That’s why we also work on community leadership development and coalition building to advocate for the policy changes our communities desperately need.”

— Rafael Mares

COMMUNITY DEVELOPMENT CORPORATIONS WERE CREATED IN THE WAKE OF THE SOCIAL JUSTICE ISSUES THAT WERE RAISED DURING THE CIVIL RIGHTS MOVEMENT OF THE 1960s. THEY PROMOTE AND SUPPORT
Rafael Mares in front of the recently finished apartment building across from Revere Beach—the first affordable apartments constructed in the area for years.

AFFORDABLE HOUSING AND STRONG NEIGHBORHOODS. OVER THE LAST DECADE ALONE, CDCS HAVE INVESTED MORE THAN $5.4 BILLION IN AFFORDABLE HOUSING AND SAFE COMMUNITIES ACROSS THE COMMONWEALTH.
Jeena Chang (top left) and Dianyet Serrano in the park. Serrano won a city-wide lottery to purchase a Hudson Street condo in Chinatown. A Latina who was born in Jamaica Plain, she is against the kind of gentrification she saw growing up and was worried about how she would be received in Chinatown. But at a meeting about a public art project she eventually led, one Chinese resident said, “You are welcome here. You’re home.”
“For many years, Hudson Street was the front porch of Chinatown,” explains Jeena Chang, Director of Community Programs & Design for Asian Community Development Corporation (ACDC). “It was a great cultural mix of Chinese, Syrian and Lebanese immigrants and a hub of activity where kids played and community members chatted on their stoops.” That all changed in 1963 when much of Hudson Street was demolished to make way for a ramp to the Southeast Expressway. But in recent years, ACDC has developed two buildings on Hudson Street, bringing back 51 units of affordable condos and 95 affordable rental units. But ACDC’s mission goes far beyond constructing buildings. “Our goal is to promote self-determination and counter gentrification in Chinatown,” explains Chang. “We really want to engage folks who are usually missing at the decision-making table. So I work with young people and working-class families because often they have multiple jobs and it’s hard for them to engage in community planning.”

ACDC participated in the Boston Foundation’s Place Leadership Network, which supported public space stewards to design culturally vibrant, equitable public spaces. “We asked our Hudson Street residents to tell our artist partner, Gianna Stewart, what they would like to see. The installation is in One Greenway Park, a greenspace between our two buildings. We created Hudson Street Stoop as a social experiment to reintroduce culture on that block. We want it to be a gathering place where people can tell stories and connect again like neighbors used to.

“This is especially important because of COVID. We’re seeing a public health crisis, an economic pandemic, with people losing jobs and being displaced, and on top of that, there is a fear of being in public spaces, especially for Asian elders after the uptick in hate crimes. So much of the messaging today tells people in Chinatown, ‘You don’t belong.’ Our goal is to push back on that narrative and say, ‘We do belong here and we deserve places of healing and joy, where we can celebrate our identities.’ ACDC’s work is ultimately about building community power to reclaim spaces and shape the future of Chinatown.”
“I’m interested in community building and what is possible when people come together to collaborate,” says Shaw Pong Liu, a classically trained violinist. “I’ve spent a lot of energy railing against the classical music establishment for being so narrowly focused and lacking in self-reflection around issues of racism and white supremacy that are embedded in European-based music,” she explains. “It’s a systemic issue and is only very slowly starting to receive some attention.”

Liu has focused on creating collaborations between musicians and community members. One of the most significant projects she has led—both in scope and staying power—is Code Listen, which she founded when she was serving as an Artist in Residence for the City of Boston in 2016 and continued through 2020. Code Listen, which was revived briefly after the murder of George Floyd last year, brought together Boston area youth and mothers who had lost children to homicide with members of the Boston Police Department to tell stories to each other and have frank dialogues about homicides while also creating music. Liu partnered with Teen Empowerment and two groups that support homicide survivors—Legacy Lives On and the Louis D. Brown Peace Institute. The project was supported partially through the Boston Foundation’s Live Arts Boston initiative.

“I’m interested in the power of listening as both a musical skill and a tool for societal communication,” she says. “Story telling alongside music is where those two things intersect.”

When asked what it takes to survive as an artist of color in Boston, she says that the first thing that comes to mind is space—space to live, to rehearse, perform and make your work. But she points out that artists are people too. “Artists of color need the fundamental things everyone needs. There is so much more that can be done when it comes to economic investment in communities of color, such as education and job supports. One way to encourage artists of color is to have more people of color in decision-making positions in foundations and businesses and government. Another idea that could help all people of color is a guaranteed, basic livable income.”

“One way to encourage artists of color is to have more people of color in decision-making positions in philanthropy, business and government. Another idea that could really help all people of color is a guaranteed, basic livable income.”

— Shaw Pong Liu

RESEARCH HAS SHOWN THAT LOCAL ARTISTS—ESPECIALLY PERFORMING ARTISTS OF COLOR—HAVE STRUGGLED IN THIS CITY, WHERE SPACE TO REHEARSE AND PERFORM IS SCARCE AND PROHIBITIVELY
Violinist and arts activist Shaw Pong Liu in the park adjoining Jamaica Pond, close to where she lives.

EXPENSIVE. IN RESPONSE, THE BOSTON FOUNDATION AND BARR FOUNDATION CREATED LIVE ARTS BOSTON IN 2017, INVESTING $4 MILLION IN LOCAL ARTISTS, 82 PERCENT OF WHOM HAVE BEEN ARTISTS OF COLOR.
Jha D. Amazi (center), rehearsing a flash mob with other artists. A spoken-word artist, Amazi recently received a grant from Live Arts Boston, an initiative of the Boston Foundation and the Barr Foundation that supports performing artists, a majority of whom are artists of color. With her grant, she is co-creating a series of flash mobs to help newcomers experience Black and Brown perspectives and understand that there are multiple sides to Boston.
Jha D. Amazi has devoted herself to creating spaces for spoken-word artists to share their work. “It grew out of the need I had for my own space,” she explains. “As I came into the world of open mics, it was obvious to me that, as a Black queer woman, some audiences were too White to understand my Black perspective—and my queer topics weren’t embraced by heteronormative crowds. I realized that I couldn’t be the only person experiencing this intersectionality.”

Amazi became the force behind an open mic series that has given spoken-word artists of color and queer artists the space they need to express themselves. During COVID, open mics have been held outside. “What the pandemic taught me—and I hope other people—is just how vulnerable we are as a society. In a moment, everything can change. And it did.”

She calls the open mic scene in Boston a movement. “I do think there is an opportunity for real change today. There are a lot of folks of color, a lot of women and many folks under the LGBTQ+ umbrella who feel they’re a part of a movement regardless of what the headlines say. Because of that, I think we have an opportunity to challenge the status quo and demand a future that we actually want to live in. Artists need space, but more generally, they need a sense of agency and the resources to do the work they want to do and thrive. Too often I encounter other artists of color and other queer artists who are just trying to breathe, trying to pay rent, trying to live.”

Live Arts Boston has funded 310 projects since 2017, 82 percent of which have been led by artists of color, and invested more than $4 million in local artists. With her grant, Amazi is co-creating a series of flash mobs.

“A lot of folks come to Boston and are transient—they’re students or tourists or they’re here for work. Very rarely do they fully understand the Black and Brown perspectives of this city. So, the flash mob is an opportunity for us to say, ‘We’re here. We exist. There are multiple sides to Boston. Come hear our story. Come be curious. Come learn.’”

—I do think there is an opportunity for real change today. There are a lot of folks of color, a lot of women and many under the LGBTQ+ umbrella who feel they’re a part of a movement regardless of what the headlines say.

—Jha D. Amazi
There is no doubt that the interest in racial equity has increased dramatically in Boston,” says Orlando Watkins, Vice President and Chief Program Officer for the Boston Foundation. “The level of conversation about equity and the realization by businesses that they are leaving so much value on the table by not using an equity lens is something I’ve never experienced before.

“Given those signals, I’m hopeful about making advances in closing the racial equity gap in Boston. But we have to remember how often, in this country, we have been outraged by some revelation around inequities that exist and then, when there’s a new injustice to turn our attention to, we quickly move on from the fundamental issue of racial equity. We have to keep it ever present.”

Watkins is encouraged by initiatives such as the Coalition for an Equitable Economy, which is fighting for equity in wealth creation and developing an ecosystem approach to supporting businesses owned by people of color in the Commonwealth. The Boston Foundation is a member of the Coalition. In 2018, Watkins helped to lead the creation of the Boston Foundation’s Business Equity Fund, which offers low-interest, patient capital to Black and Latinx owned businesses.

“Folks have worked together in the past, but now, with the Foundation for Business Equity, the Coalition for an Equitable Economy and other collaborative efforts, we have a powerful, collective agenda for change,” he says. “These coalitions are focused on access to capital; forming more small BIPOC businesses; and gaining access to customers who traditionally have been blocked out. These are platforms for organizations to work more collectively and get more done, as great coalitions always do.”

Asked whether the current focus on closing the wealth gap is just a moment or has the potential to turn into a movement, he responds, “The fight to close the racial wealth gap has to be more than a moment. We can’t take 400 years of oppression and then think that we can quickly change minds and practices and policies. The fight is long.”

Awareness of the vast racial wealth gap in our city gained steam in 2017 when a report released by the Federal Reserve Bank of Boston, titled The Color of Wealth in Boston,
Orlando Watkins in front of a mural at Doña Habana, a Cuban restaurant owned by Tres Islas Group, one of the businesses invested in by the Boston Foundation’s Business Equity Fund.

Showed that the median household wealth of Black households was $8, compared with $247,500 for White households—making Boston one of the most unequal cities in America.
Symone Crawford (right) with Dafany Pressaet, who recently purchased a house in Mattapan with the help of STASH. “When you buy a home, you are making an investment in your future and building equity,” says Pressaet. “Now, I am turning my house into a home slowly but surely, doing renovations that I could not have done as a renter. Homeownership gives me control of my very own environment and that’s a great feeling.”
When Symone Crawford first immigrated from Jamaica and settled in Boston in 1999, she, her husband and their three children were living in a basement apartment. “I desperately needed to buy a home,” she says, “so, I went to a home buying class at Massachusetts Affordable Housing Alliance (MAHA). After I graduated, I purchased a three-family home in Mattapan. I wanted a single-family home, but I needed to have income. Being a landlord is a lot of work, but so far I’ve been very lucky.”

Impressed with MAHA, Crawford began volunteering for the nonprofit in 2004, helping other people become homeowners. She was such a fan of MAHA that she joined the board and eventually became president. And, when a job opened up there, she applied for and got it. Since then, she has created a groundbreaking program that has helped dozens of families purchase homes. STASH—Saving Toward Affordable Sustainable Homeownership—is a matched-savings program for first-generation homebuyers. In order to qualify, families can’t have savings that exceed $75,000, but they must save $2,000 for a down payment. That is matched by STASH, but the goal is to raise enough funding to provide $20,000 in matched dollars. Ninety-seven percent of participants are people of color.

“Massachusetts is second to last in America when it comes to homeownership by people of color,” she explains. “About 70 percent of White people own their own home here compared to 35 percent of Black, Latinx and Asian people combined. The racial wealth gap and the racial homeownership gap are intertwined. If we can get people into homes and allow them to build equity, we could see a big change. Ultimately, homeownership leads to a better quality of life.”

STASH, which has attracted national interest, asks that everyone begin by taking one of MAHA’s homeownership classes, as Crawford did. Currently the program is graduating close to 2,500 people a year.

“We, as Black people, don’t usually have the luxury of knowing people we can go to for help,” says Crawford, “and lenders don’t have the time and patience to help us for some reason. We just aren’t treated nicely, so I try my best to make people feel they matter. You can’t pay for that.”
When Kristin McSwain, Executive Director of the Boston Opportunity Agenda, is asked about those students who have lost the most during this once-in-a-century challenge to schooling, she points to three groups—all clustered around the delicate transitions from one stage of life to another. “First, in early childhood,” she explains, “there are all of the children who should have had, not only an introduction to education, but experiences with peers that lead to social and emotional learning—not to mention screening for those who need help developmentally. That’s a period you will never get back.

“Then there are those between middle school and high school, who exercise a little more agency over their learning, but haven’t had the out-of-school experiences that can connect them to the real world and help them think about who they are and who they want to be.

“Finally, there are those who haven’t transitioned successfully out of the K-12 system into higher education. Many college leaders will tell you that our higher ed institutions were built for White males. So, how do we change that? We value the assets that are brought by young men and women of color. That’s the equity work we have to do.”

There are opportunities for investments across the entire education system, but McSwain sees early childhood as an area where government, philanthropy and the business community all can play powerful roles. “We need to double down on our investments in child care to make sure that when parents return to work—or want to return to work—there is a place for their children to go and learn and grow and develop. Already we’re seeing federal funds through the Recovery Act recognizing that child care is a driver of economic opportunity, not just educationally for children, but because of the importance of the child-care infrastructure to our economy.

“I think that philanthropy can have a real impact on early childhood because it can move nimbly and urgently to pilot some models that government can then scale. And businesses already are stepping up and thinking about what they can do from a funding and a policy perspective.”
Kristin McSwain, who has led the Boston Opportunity Agenda for more than a decade, in front of the Joyce Kilmer School in West Roxbury.

It focuses on removing the systemic barriers that create unacceptable outcomes and lack of opportunity for historically oppressed and economically disadvantaged populations.
Joél Mora (above left) and Nelfi Morales at UMass Boston. Mora coaches Morales through the Success Boston college completion initiative. “Joél is the first person I call when I have a question or a problem,” says Morales, who is in his third year. “I talk about finances, my major, personal problems—anything.” Morales considered dropping out during COVID. “I’m glad I took Joél’s advice and stayed in,” he says. (Right) Mora and Morales with Farida Loseille, another student Mora coaches.
Success Boston coach Joél Mora was the first in his family to graduate from college and so can speak with authenticity—especially when it comes to young Latino men, who struggle the most with college completion. That’s one of the reasons he’s so effective at his job. Mora has been with Success Boston for 11 years and, as a coach at Hyde Square Task Force, has coached 300 students.

Success Boston is our city’s college completion initiative. It is committed to increasing post-secondary completion, through systems change and equity-minded practices, with a special priority on Black and Latinx students. Partners and funders include the Boston Foundation, the Boston Public Schools, the City of Boston, 37 institutions of higher education—led by UMass Boston and Bunker Hill Community College—and numerous local nonprofit partners, who receive funding to manage the coaches. The initiative has the ambitious goal of raising the completion rate from where it started with the class of 2000 at 35 percent to 70 percent. So far, it has climbed to 54 percent for the Class of 2012.

Mora is now the Assistant Director of Student Success Programs at UMass Boston, which happens to be the school from which he graduated. He says there is no secret sauce to coaching. “You just have to be very responsive and really listen to what they’re saying. To be invited into the lives of these students and have an impact, small or large, is such an honor.”

The pandemic added a burden to students who already were struggling. “Many of my students had their drive and motivation put on pause or shut off,” he explains. “They had to deal with family and financial issues, they worried about being evicted and some even got COVID.” Mora found himself helping students file for unemployment or write letters to landlords.

“The pandemic was hard on college students,” he says, “especially for students who had financial and family responsibilities. Financial issues are at the top of the list of challenges for graduates of the Boston Public Schools. That is the number one equity issue we have to address.” Mora is proud that, despite the disruptions caused by the pandemic, 34 of his students graduated this year.
Donors

THE ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP

The following individuals, families and institutions contributed to this year’s campaign to support the Boston Foundation’s civic leadership.

$100,000+
Anonymous
Advent International Corporation
Elizabeth and Phillip Gross
Dwight and Kirsten Poler

$50,000-$99,999
Anonymous (2)
Josh and Anita Bekenstein
Jane Brock-Wilson
The Chandler Family
Sandra and Paul Edgerley
Jeff Core
The Klarman Family Foundation
Linda Mason and Roger Brown
The Lynch Foundation
Elizabeth and Phillip Gross
Dwight and Kirsten Poler

$25,000-$49,999
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$10,000-$24,999
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Bank of America Charitable Foundation
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One8 Foundation
Stephanie and Brian Spector
David and Louise Weinberg

$5,000-$10,000
Anonymous (5)
Karen and Jim Ansara
Bank of America Charitable Foundation
Aixa Beauchamp and Thomas Melendez
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Boston Globe
Katherine K. Brobeck
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Anne R. Lovett and Stephen G. Woodsum

These contributions help us to serve as a think tank and advocacy organization, publish research into the most critical issues of our time and bring people together to exchange ideas, influence public policy and solve problems.

We thank our donors for their generosity and support.
Advent International has a deep commitment to corporate philanthropy, through which the company supports organizations and charities in Boston and abroad with the goal of helping to build stronger, more sustainable communities. It has a special focus on health care and education. For close to a decade, the global private equity firm has been a major sponsor of Partners in Health, the international medical organization that helps build and sustain public health systems in poor and underserved communities around the world. In Boston, where Advent was founded, it focuses on supporting the nonprofits and causes that matter to its employees. “Advent is proud to be an active member of the community in Boston,” says David Mussafer, Advent’s Chairman and Managing Partner, “and we are committed to continuing to be a strong philanthropic partner in Greater Boston, as reflected by our contribution to the Annual Campaign for Civic Leadership.”

Advent International
GLOBAL PRIVATE EQUITY

Richard and Nancy Lubin
Martin and Tristin Mannion
Kristin and Paul Marcus
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Lori and E.J. Whelan
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Linda and Brooks Zug

$5,000-$9,999
Anonymous (8)
Pam and Bob Adams
Barbara Jane Anderson
Andrew Arnott
Blue Cross Blue Shield of Massachusetts
Katrine Bosley
Boston Consulting Group
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Kenneth and Barbara Buntrock
William T. Burgin
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Scott Collins
Todd Cronan
Jeffrey and Dana Davis
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Suffolk Cares Charitable Foundation, Inc.
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Gregory T. Torres
Gina and Mark Verdi

$2,500-$4,999
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Gerald and Kate Chertavian
Eugene and Meredith Clapp
Commodore Builders
Carol Deane
John H. Deknatel and Carol M. Taylor
Timothy and Maureen Dibble
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Jerry Rappaport, Jr. and Lori Rappaport
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Scott E. Squillace, Esq. and
Christopher J. Gayton
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Emily V. Wade
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$1,000-$2,499
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A.W. Perry, Inc.
Mohamad and Kecia Ali
Aliad Fund
Aulus Dental Insurance Company Fund
Carol and Howard Anderson
The Apgar Family
Zamawa Arenas
Jennifer W. Aronson
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Katherine Chapman Stemberg
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Stephanie Dodson Cornell and
James Cornell
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Rosalind Gorin and Matthew Budd
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Lauren Louison Grogan
Barbara and Steve Grossman
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John and Kathryn Hamill
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Income Research + Management
Ira Jackson
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Barbara Leggat
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J.H. and Carolyn K. Walton
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C.A. Webb
Benaree F. and Fletcher H. Wiley
Judy and George Wilson
J. David Wimberly
Lynda Wood

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Evelyn Barahona
Anthony and Jacqueline Baudanza
James C. Beck
Jeanie and Henry Becton
Nancy Benchoff
Thomas Bentley and Allison Stokes
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Mary Buka
Burns & McDonnell Foundation
Hillary Burr
Cary and Helga Bussema
Vanessa Calderon-Rosado, Ph.D
Katherine Canfield
James Carney
Margaret W. Casey
Charles Street A.M.E. Church
Sally Clapp
A. Richard Cohn
Robert Cooper and Miriam Leeser
Donna Cuptelo
J. H. Daingerfield and Constance R. Perry
André and Marilyn Danesh
Corey Davis
Holbrook R. Davis
Charles Y. Deknate
Denterlein Worldwide
Lynn DePippo
Charles Desmond
Ruth Dinerman
Robert and Tara Donnelly
R.J. Donofrio
Micaila Donovan
Michael Douvadjian and Lynne Brainerd
Carol and Robert Dutton
David W. and Marion Ellis
Charles and Katherine Engle
Ellen Epstein
Phill Gross and Elizabeth Cochary Gross co-chaired the Boston Foundation’s Annual Campaign for Civic Leadership last year, helping the campaign reach its goal of $3.3 million to support the Foundation’s research, convenings and public policy work. Both are prominent in Boston’s nonprofit community. Phill is co-founder and managing director of Adage Capital Management and serves on the boards of a number of nonprofits. Elizabeth is an adjunct professor at the Friedman School at Tufts and has been a major figure in Concord’s Umbrella Arts Center, chairing the Center’s capital campaign.

“The Boston Foundation is an important civic leader for Greater Boston and we were honored to co-chair last year’s campaign,” says Phill. “We were especially gratified that the campaign met its goal during this time of tremendous need in our city.”
Robert Kraft and the Kraft Family have a long history of making philanthropic investments that support a vision of social justice. That tradition continues today through the Kraft Family Foundation and its philanthropic investments, which are governed by the principle of creating equity for our most vulnerable populations. The Kraft Family supports initiatives that provide equity, create opportunities, facilitate social and economic mobility, and create social safety nets where they do not currently exist. The $1 million gift to the Boston Foundation established the Kraft Family Non-Profit Emergency Fund, a Field of Interest Fund at the Boston Foundation, which has made donations to a number of nonprofits, including The BASE, an urban academy that combines sports and educational opportunities to support the limitless potential of our city’s young people.
$10,000–$999,999
The following list includes donors who have made gifts totaling $10,000 – $999,999 to the Permanent Fund for Boston, with the year of their first contribution noted in parentheses.

<table>
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<th>Name and Date</th>
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Pauline Klevin Trust (1990)
Estate of James G. Knowles (1982)
Dr. and Mrs. Arthur R. Kravitz (1987)
Bernard E. Kreger (2021)
Estate of Louise P. Kush (1997)
Aimee Lamb Trust in memory of Winthrop and Aimee Sargent (1980)
Estate of Ida Fales Lamb (1967)
Lambert Marital Trust (2007)
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Thomas Lee (1997)
Barbara Estabrook Livermore Trust (1982)
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Linda Mason and Roger Brown (2021)
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Ethel Fay McGuire Trust (1973)
Thomas Melendez and Aixa Beauchamp (2013)
Jack and Elizabeth Meyer (2021)
MFS Investment Management (2014)
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Estate of Arthur W. Moors (1950)
Reinier Moquete (2014)
Gertrude Morrison Trust (1965)
Estate of John Wells Morris (1940)
Wilbert G. and Eunice Muttart Foundation (2007)
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Nixon Peabody LLP (1997)
Northern Trust (2006)
The Overbrook Foundation (1990)
Estate of John Adams Paine (1967)
Mary F. Parker (2004)
Estate of Winthrop D. Parker (1967)
Estate of Mary F. Pearl (1997)
Estate of Annie S. Penfield (1979)
Phillip Perelmutter (2014)
Janet S. Perkins Charitable Remainder Unitrust (2000)
Philanthropic Collaborative, Inc. (2000)
Estate of Blanche E. Philbrick (1965)
Estate of Mary N. Phillips (1974)
Estate of J. Christie Pingree (1957)
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Estate of Carrietta W. Proverbs (1984)
Bernard and Suzanne Pucker (2016)
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Mr. Robert A. Radloff (2000)
Estate of Bertha J. Richardson (1975)
Estate of Frank L. Richardson (1975)
Estate of Charles E. Riley and Agnes Winslow Riley (1972)
Mabel Louise Riley in memory of Charles Edward (1972)
Harry & Minnie Rodwin Memorial Fund (1975)
Harriet Rogers Unitrust (1990)
Professor and Mrs. Walter J. Salmon (1997)
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David and Marie Louise Scudder (2001)
Estate of Helen S. Sharp (1966)
Estate of Frank R. Shepard (1954)
Estate of Anne G. Shewell (1984)
J. de Vere Simmons Trust (1985)
Alice Wilder Smith in memory of Frank Langdon Smith (1968)
Edson B. Smith Trust (1984)
Estate of Eleanor Smith (1986)
Irene C. Smith Trust (1975)
Florence Snelling Trust (2006)
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Helen Spaulding (1990)
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Estate of Francis M. Stanwood (1961)
Estate of Mary P. Stone (1948)
Gertrude T. Taft (1956)
Tech/Ops, Inc. (1982)
Tiny Tiger Foundation (2001)
Estate of Lenna R. Townsend (1952)
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United Asset Management Corporation (1997)
Estate of Willis S. Vincent (1940)
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Clara Wainwright (1998)
Wallace Foundation (1998)
Estate of John M. Ward (1927)
Leo Wasserman Foundation (1997)
Estate of Madeline Cobb Webber (1973)
Edwin S. Webster Foundation (2000)
Estate of Louise M. Weeks (1944)
David and Louise Weinberg (2021)
Estate of Arthur W. Wheelwright (1963)
Estate of Stetson Whitcher (1927)
Estate of Joseph A. White (1979)
Estate of Edward E. Williams (1950)
Estate of Lizzie A. Williams (1951)
Estate of Mary Deny Williston (1998)
Winston Salem Foundation (1991)

**CENTENNIAL SOCIETY**

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

Anonymous (12)
James F. Becker and Randal D. Rucker
Rick and Nonnie* Burns
Sy Danberg
Belden, Pamela, and Andrew Daniels
Marilyn J. Darling
Richard and Marcia DeWolfe
Ruth Dinerman
Michael and Barbara Eisenson
Judith and John Felton
David J. Elliott and Hungwah Yu
Grace and Edward Fey
Atsuko and Larry Fish
Peki Garber
Brian Hyde
Jane Wegscheider Hyman
Louis and Marcia Kamentsky
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The McLachlan Family
Jack Mitchell
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Joseph G. Prone Foundation
Robert A. Radloff
Marilyn and Robert Root
Lindsey A. Rosen
Dr. David and Mrs. Judith M. Schurgin
Sandra M. Stark
Mark and Grace Sullivan

*Deceased
Members of the Boston Foundation’s Legacy Societies are deeply committed to providing the Boston Foundation with the resources it will need—not only today, but into the future—in order to meet the ever-changing needs of our community.

We thank these generous donors and honor them here.

C E N T E N N I A L  S O C I E T Y  D O N O R S

RICK AND NONNIE BURNES

On August 19 of this year, Greater Boston, the Commonwealth of Massachusetts—and the world—lost a remarkable woman. Nonnie Burnes was an attorney, a judge, a commissioner, a teacher and a social warrior. With her husband, Rick Burnes, she was also a philanthropist. When Rick and Nonnie Burnes decided to open a Donor Advised Fund at the Boston Foundation in 1994, they called it the Butler’s Hole Fund, named for a magical spot where Nantucket Sound meets the Atlantic Ocean. All three of their adult children also have their own Donor Advised Funds at the Foundation as well, all with the words “Butler’s Hole” in the fund names. Nonnie leaves her devoted husband, Rick Burnes, who served for many years as a valued member of the Boston Foundation’s Board of Directors. As a couple, Rick and Nonnie made a commitment to leave $1 million to support the Foundation’s endowment, the Permanent Fund for Boston, which gives the Foundation’s Board the crucial resources we need to respond to the needs of the people of Greater Boston.

L O N G L E S S E Y  L E G A C Y  S O C I E T Y

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

Anonymous (7)
Frank X. Addonizio
Howard and Carol Anderson
Hanna and James Bartlett
Dorothea M. Blizzard*
Barry Bluestone and Mary Ellen Colten*
Janine Bouchard
Margaret A. Bush
Barry B. Corden
Constance and Lewis* Counts
R. J. Donofrio
Thomas M. and Catherine Axon* Elder
Ellen Epstein and Rose* and Lee* Epstein
Paul and Patricia Gannon
Paul S. Grogan
Kate Guedj
Dean T. Hara and Congressman Gerry E. Studds*
Ann S. Higgins
Helen M. Jones
Jonathan and Judy* Keyes
Anne F. Kilguss
Peter and Stephanie Kurzina
Bernadette M. MacPherson
Barbara and Myron* Markell
Rabbi Bernard H. Mehlman
Timothy and Deborah Moore
Herbert E. Morse and EllenJoy Fields
Katharine S. Nash
Beatrice and Peter Nessen
Ruben D. Orduña
Jennifer Josie Owens
Nathaniel Pulsifer
Gary and Natalie Robinson
Anthony Mitchell Sammarco
Wendy C. Sanford
Daniel I. Sherman
Charles E. and Deana M. Shirley
Binkley and Paula Shorts
Scott E. Squillace, Esq.
Charles A. Walsh III
Ann and Hans Ziegler

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

Anonymous (36)
Mary Lee T. and Peter C. Aldrich
G. Thomas and Allison Aley
Barbara Jane Anderson
Diane DeSerras Arenella
Geoffrey D. Austrian
Lisa and Stephen Ayres
Sherwood E. Bain
Mary Barber
Rich Becker
Laurie A. Bengal, CPA
Doreen B. Biebusch
Thomas W. Bird
David Blot
Kenneth S. Brock
Jacob F. and Barbara C. Brown
Rick and Nonnie* Burnes
Margaret A. Bush
Frank and Ruth Butler
David and Gay Campbell
Helen T.W. Chen and Keith R. Ohmart
Stanley* and Josephine Chen
Edward A. and Penny Cherubino
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David S. and Shirley G.* Dayton
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Malcolm Dunkley
Anita Maria Elliott
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Sandra and Philip* Gordon
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Dr. G. Anne Guenzel
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Marilyn L. Harris
Barbara Haueter Woodward
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Carol M. Brogna Henderson
Petie Hilsinger
Kenneth D. and Cynthia L. Holberger
Chuck Holland
Helen R. Homans
Marjorie Howard-Jones
Stephen G. and Rosemarie Torres Johnson
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Louis and Marcia Kamentsky
Gary P. Kearney, M.D. and Susan Kearney
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Donald J. and Susan Kelley MacDonald
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Meredith and Elsa McKinney
The McLachlan Family
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Charles Fessenden Morse
Frederick W. Neinas, M.D.
Carl H. Novotny and
Rev. Judith Swahnberg
Mark A. and Judith A. Osborne
Douglas D. and Geraldine Payne
Nancy E. Peace
Robert A. and Veronica S.* Petersen
Warren Radtke and Judith Lockhart Radtke
Chris Remmes
Richard L. Robbins
Edith M. Routier
John A. Russell
Wendy C. Sanford
Margaret Schmidt and Kenneth Danila
Binkley and Paula Shorts
Ellen L. Simons
Edward G. (Ted) and Nancy L. Smethurst
Cheryl H. Smith
Scott E. Squillicie, Esq.
David F. and Patricia R. Squire
Anne B. Stone
Anne Thompson
Libby and Sidney Topol
Alan and Pamela Trefler
Joy E. Van Buskirk
Peter S. and Pamela L. Voss
Robert R. Wadsworth and
Catherine E. Moritz
Inge J. Wetzstein
Constance V. R. White
Eric S. and Linda H. White
Jeffrey and Theresa Whitehead
Michael N. and Mary M. Wood

*Deceased
PERMANENT FUND FOR BOSTON

UNRESTRICTED FUNDS

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

Emily Tuckerman Allen Fund (2006)
Anonymous Fund X (2018)
Area IV Fund (2015)
Geno A. Ballotti Fund (1985)
Irene W. Bancroft Fund (1997)
James R. Bancroft Trust Fund (1985)
Harriett M. Bartlett Fund (1988)
J. E. Adrien Blais Fund I (1968)
The Barry Bluestone and Mary Ellen Colten Legacy Fund (2017)
James Dean Fund (1947)
Herbert and Lucy Fields Fund (2009)
Edward Glines Fund (1939)
Nathaniel Hooper Fund (1939)
Michael B. Keating Fund for Justice and Social Equity (2016)
Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2007)
Polaroid Fund (1997)
Ruth M. Reiss Memorial Fund (1997)
Walter J. & Marjorie B. Salmon Fund (1999)

UNRESTRICTED FUND

REVEREND RAY A. HAMMOND FUND FOR THE NEIGHBORHOODS OF BOSTON

Reverend Dr. Ray Hammond served as the Chair of the Board of Directors of the Boston Foundation from 2002 to 2009 and had a profound effect on the Foundation’s work in the Greater Boston community. When his term as Chair ended, the Board of Directors created the Rev. Ray A. Hammond Fund for the Neighborhoods of Boston as a tribute to him. The Fund is unrestricted, which means that it is among the most flexible funds in the Boston Foundation’s endowment, the Permanent Fund for Boston, giving the staff and board the ability to support nonprofit organizations that reflect the spirit of Rev. Hammond’s devotion to Boston’s neighborhoods. Over the last two decades, grants from this Fund have gone to 19 neighborhood-based nonprofit organizations.
FIELD OF INTEREST FUNDS

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

Accelerating Investment for Health Communities (AIHC) (2020)
Solomon Agoos Fund (1987)
Artis Fund (1998)
  Free for All Endowment Fund (2014)
  Edward Hyde Cox Fund (2001)
  Anna Faith Jones Arts Fund (2001)
  Brother Thomas Fund (2008)
  Brooks White, Jr. Memorial Fund (2001)
  Edith M. Ashley Fund (1961)
  Asian Community Fund (2019)
  Edith M. Ashley Fund (1961)
  A. Peabody Stetson Fund (1938)
  The Shout Syndicate Fund (2018)
  Artis Fund (1998)
  Solomon Agoos Fund (1987)

COVID-19 Equity and Entrepreneurship Fund (2020)
Covid-19 PPE Fund (2020)
COVID-19 Response Fund (2020)
David W. Cushing Fund (1988)
DACA Dream Fund (2018)
Mabel Walsh Danforth Fund (1950)
Virginia Herrick Deknatel Fund for Children's Services (2002)
  Annie S. Dillaway Fund (1966)
  Kate Ellis Fund (1954)
  Equality Fund (2012)
  Mary C. Farr Arts Fund (2006)
  Frederika Home Fund (1980)
  General Support Fund for Education (1989)
  Elizabeth D. Goldsmith Fund for Families (2011)
  Charles W. Happgood Trust Fund (1987)
  Mary Harris Fund (1941)
  Grace L. Holland Fund (2008)
  Theodore C. Hollander Trust Fund (1929)
  Invest for Better Fund (2021)
  Jamaica Plain Dispensary Fund (1963)
  Lisa P. Kush Fund (2016)
  David W. Cushing Fund (1988)
  Janet S. & George T.B. Perkins Fund (2000)
  Petersen Family Fund for the Environment (2016)
  David R. Pokross Fund for Children in Need (1997)
  Alice F. Rosenquist Fund (1985)
  Fund for Self-Reliance (1989)
  Louis Agassiz Shaw Fund (1992)
  Katherine Dexter-Shelman Fund (1955)
  The Shout Syndicate Fund (2018)
  Sophia Snow Fund (1949)
  Helen & Marion Storr Fund (1986)
  Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994)
  Carroll J. Swan Memorial Fund for Children's Charities (1936)
  Nelson E. Weeks Fund (1938)
  Fanny Wharton Fund (1920)
  Katherine C. Wheeler Fund (1988)
  Fund for Preservation of Wildlife & Natural Areas (1994)
  Herbert Farnsworth Fund (1994)
  Hollis D. Leverett Memorial Fund (1994)
  Ruth and Henry Walter Fund (2011)
  Arthur L. Williston and Irene S. Williston Trust for Education (1954)
  Mary Dewey Williston Fund (1970)
  Window Shop Fund (1989)
  Gladys W. Yetton Fund (1970)

FIELD OF INTEREST FUND

THE PAUL S. GROGAN FUND FOR CIVIC LEADERSHIP

Paul S. Grogan served as President and CEO of the Boston Foundation from 2001 to 2021. Over the course of those two decades, he transformed not only the Boston Foundation, but the role of community foundations across America. His “changing the game” formula for civic leadership, which includes research, convenings and public policy work, has given the Foundation the tools it needs to change the very conditions philanthropy was created to alleviate. To honor his tenure and his groundbreaking work on behalf of Greater Boston and the community foundation field, in 2021 the Foundation’s Board of Directors established The Paul S. Grogan Fund for Civic Leadership to sustain and build on his pioneering vision and work. The initial focus of the grants from this fund is on racial justice, anti-racism and supporting leaders of color in Greater Boston.

The Paul S. Grogan Fund for Civic Leadership (2021)
  Norman Everett Pearl Fund (1997)
  Janet S. & George T.B. Perkins Fund (2000)
  David R. Pokross Fund for Children in Need (1997)
  Alice F. Rosenquist Fund (1985)
  Fund for Self-Reliance (1989)
  Louis Agassiz Shaw Fund (1992)
  Katherine Dexter-Shelman Fund (1955)
  The Shout Syndicate Fund (2018)
  Sophia Snow Fund (1949)
  Helen & Marion Storr Fund (1986)
  Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994)
  Carroll J. Swan Memorial Fund for Children’s Charities (1936)
  Nelson E. Weeks Fund (1938)
  Fanny Wharton Fund (1920)
  Katherine C. Wheeler Fund (1988)
  Fund for Preservation of Wildlife & Natural Areas (1994)
  Herbert Farnsworth Fund (1994)
  Hollis D. Leverett Memorial Fund (1994)
  Ruth and Henry Walter Fund (2011)
  Arthur L. Williston and Irene S. Williston Trust for Education (1954)
  Mary Dewey Williston Fund (1970)
  Window Shop Fund (1989)
  Gladys W. Yetton Fund (1970)
The Boston Foundation is proud to be a supportive partner to individuals, families and companies who utilize the Foundation’s Donor Advised Fund program to pursue their own philanthropic interests and make a difference through charitable giving.

DONOR ADVISED FUNDS

The year the fund was established is listed in parentheses and new funds are bolded. In addition to the 29 new Donor Advised Funds listed, there were seven new anonymous Donor Advised Funds in fiscal year 2021.

3C Fund (2013)
63 Marlborough Street Fund (1985)
A & E Educational Quest Fund (2005)
The Aberdale Family Foundation (2020)
Walter and Alice Abrams Family Fund (2006)
Abromowitz/Ruttenberg Family Fund (2001)
Acacia Fund (2005)
Adler Family Fund (2006)
Adlib Foundation (2010)
The Ajax Foundation (2020)
AK Family Charitable Fund (2021)
The Akil Fund (2016)
James F. Alenson Memorial Fund (2007)
Aley Fund (2010)
Alda Fund (1994)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1996)
Altus Dental Insurance Company Fund (2020)
Amazon Boston Community Fund (2021)
George and Nedda Anders Fund (1992)
Barbara Jane Anderson Fund (2000)
Ashley Anderton Memorial Fund (2017)
Selma and Bayness Andrews Fund (2007)
Anony Fund (1999)
Ansara Family Fund (2006)
Anthes Weitz Family Fund (2015)
Anthropologists’ Fund for Urgent Anthropological Research (1996)
Arba Lifnot Boker Fund (1993)
Arch Stanton Charitable Fund II (2016)
Zamawa Arenas and Murray Forman Fund (2021)
Armony Erel Charitable Fund (2009)
Artful Impact Fund (2020)
Atalaya Fund (2013)
Atlantic Fund (1998)
Ausschnitt Fund (2005)
The Christopher A. Avery Charitable Fund (2020)
Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)
Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
The Ayres Family Fund (2020)
Back Porch Fund (2015)
Bagley Family Fund (2016)
Bain Capital Relief Fund (2018)
M. Baldwin Family Fund (2016)
Hanna and James Bartlett Fund (2015)
Baudanza Family Fund (1998)
Beachcomber Fund (2008)
Bellinger Fund (2008)
Benjamin Foundation (2006)
William D. & Mary E. Benjes Fund (1985)
Jane Bernstein Fund (2006)
Best Doctors Charitable Foundation (2011)
Charlotte Saltonstall Bigham Memorial Fund (2005)
Bird Fund (1999)
Bill Bither Charitable Fund (2014)
Bitpipe Legacy Fund (2005)
Black Philanthropy Fund (2009)
Emmanuel and Jane Blitz Fund (1993)
Blue Piano Fund (2018)
Tom and Lisa Blumenthal Family Foundation (2006)
Joan T. Bok Fund (1998)
Bolze Family Fund (2013)
The Bonomo Family Fund (2017)
Bolze Family Fund (2018)
The Bonomo Family Fund (2017)
Braverman Family Fund (1993)
Bride-McEnany Fund for Empowering Women (2014)
Anne C. and David J. Bromer Fund (2021)
Bronner Charitable Foundation (2006)
Brooke Family Donor Advised Fund (2008)
Peter A. Brooke Fund (1999)
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<th>Fund Name</th>
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<td>The Christine A. Brown Fund (2019)</td>
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<td>William T. Burgin Fund (2001)</td>
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<td>John A. Butler Memorial Fund (1989)</td>
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<td>Kairots Butler Fund (1994)</td>
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<td>Butler’s Hole East (2012)</td>
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<td>Butler’s Hole South (2012)</td>
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<td>The Cali-Evett Family Fund (2020)</td>
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<td>Krystle Campbell Memorial Fund (2013)</td>
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<td>James E. Canales and James C. McCann Fund (2018)</td>
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<td>Carbonite Charitable Fund (2018)</td>
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<td>The Carlson Stone Foundation (2020)</td>
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<td>Margaret W. Casey Fund (1987)</td>
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<td>John J. Cattaneo III Fund II (2017)</td>
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<td>Celebrate Zoe’s Life Fund (2021)</td>
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<td>Charlesbank Donor Advised Fund (2020)</td>
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<td>Charlestown Benevolent Fund (2011)</td>
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<td>Charlestown Fund (2009)</td>
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<td>Chasin/Gilden Family Fund (2000)</td>
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<td>Charles Ezkel and Jane Garfield Cheever Fund I &amp; II (2006)</td>
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<td>Chelsea Community Fund (1998)</td>
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<td>Joyce Chen and Helen Chen Foundation Fund (1995)</td>
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<td>Cherry Stone Archives Fund (2011)</td>
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<td>Chertavian Family Fund (2006)</td>
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<td>Christ on Earth Fund (1989)</td>
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<td>Michael W. Christian Memorial Fund (1987)</td>
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<td>Dr. &amp; Mrs. B.U. Chung Fund (2000)</td>
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<td>Chung Family Fund (2000)</td>
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<td>Churchill Family Fund (1997)</td>
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<td>Circle Fund (1998)</td>
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<td>Civic Engagement Fund (2011)</td>
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<td>CJF Foundation Fund (2007)</td>
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<td>Clark Family Fund (2011)</td>
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<td>Colby Charitable Fund (1981)</td>
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<td>Colin’s Joy Project (2019)</td>
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<td>Colony Road Fund (1997)</td>
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<td>Condor Street Fund (1989)</td>
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<td>Karen and Brian Conway Fund (2017)</td>
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<td>The Pat Cooke Fund (2016)</td>
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<td>Coolidge Family Fund (1982)</td>
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<td>Cooper Leeser Family Fund (1997)</td>
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<td>The Ann &amp; Will Cordis Fund (2019)</td>
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<td>Stephanie Dodson Cornell and James Cornell Family Foundation (2016)</td>
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<td>Corvelli Fund (1996)</td>
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<td>Constance and Lewis Counts Fund (1991)</td>
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<td>Christopher H. Covington and Bonnie G. Covington Fund (2020)</td>
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<td>Jessie B. Cox Charitable Trust Fund (2009)</td>
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<td>Cox Legacy Fund (2010)</td>
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<td>Coxhead Family Foundation (2017)</td>
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<td>Joseph and Nancy Craven Family Fund (2014)</td>
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<td>Cregan Charitable Fund (2005)</td>
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<td>Crosby Family Fund (2000)</td>
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<td>Kate Krozier Fund (2008)</td>
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<td>Cuming Family Endowment Fund (1996)</td>
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<td>Tarrant and Laura Cutler Charitable Gift Fund (2009)</td>
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<td>John Da Silva Memorial Fund (1989)</td>
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<td>Lawrence B. and Elisabeth T. Damon Charitable Fund (2014)</td>
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<td>Darling Family Fund (1983)</td>
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<td>Jeff and Dana Davis Charitable Fund (2020)</td>
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<td>Kimberly Dawson Charitable Fund (2012)</td>
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<td>Rebecca Derby and Evan Morton (2008)</td>
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<td>Sarah Derby and Gary MacDonald (2008)</td>
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<td>DeWolfe Family Fund (2001)</td>
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<td>Larry DiCara Fund (2006)</td>
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<td>Dillon Fund (2005)</td>
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<td>Doe Noordzij Fund (2002)</td>
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<td>Eric Dolinski &amp; Kristen Ploetz Fund (2015)</td>
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<td>Marthanne Dorminy Fund (2015)</td>
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<td>Drane Center Fund (2002)</td>
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<td>Dretler Family Fund (2018)</td>
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<td>Dryfoos Family Fund (2013)</td>
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<td>William J. Ducas Charitable Fund (2012)</td>
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<td>Bill and June Duggan Fund (2017)</td>
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<td>Rebecca F. Duke Charitable Fund (2016)</td>
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<td>The Eagle Fund (2001)</td>
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<td>Ecclesia Mission Fund (2013)</td>
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<td>Edgerley Family Fund (2012)</td>
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<td>Gregory J. Egan Donor Advised Fund (2019)</td>
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<td>Egozy Fund (2007)</td>
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<td>Eisenson Family Fund (2005)</td>
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<td>Stephen J. Elledge (2017)</td>
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<td>Elliott and Yu Education Fund (2012)</td>
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<td>Ellis Family Fund (2003)</td>
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<td>Elphaba Fund (2014)</td>
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<td>Elving-Carr Family Fund (2016)</td>
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<td>The Ethic, A Wealth Bank Fund (2021)</td>
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<td>Ethics Trust Fund (1994)</td>
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<td>Connor Evans Fund (2018)</td>
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<td>Evans Family Fund (2000)</td>
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<td>Norris and Constance Evans Family Charitable Fund (2008)</td>
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<td>Taylor Evans Fund (2018)</td>
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<td>The Ewing Family Fund (2014)</td>
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<td>Faber Daeufer &amp; Irrato Fellowship Program (2017)</td>
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<td>Peter and Ellen Fallon Fund (1998)</td>
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<td>The Farlowia Fund (2017)</td>
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<td>Carol Fazio Charitable Fund (2011)</td>
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<td>The Fialkow Family Foundation (2020)</td>
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<td>Fish Family Fund (2010)</td>
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<td>The Donald R. and Barbara A. Fisher Family Charitable Fund (2020)</td>
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<td>Jack Florey Fund (2005)</td>
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<td>Flower Hill Fund (2012)</td>
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<td>Foote-Richards Family Foundation (2014)</td>
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<td>Footpath Fund (2019)</td>
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<td>Forshey Family Fund (1998)</td>
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<td>James &amp; Audrey Foster Charitable Foundation (2018)</td>
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<td>Free for All Concert Fund (2011)</td>
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<td>Niki &amp; Alan Friedberg Fund (1987)</td>
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<td>Fulkerson Family Fund (1999)</td>
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<td>Lyle W. Fulkerson Fund (1999)</td>
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<td>Fuller Trust, Inc. Fund (2010)</td>
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<td>Future Fund (2006)</td>
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<td>Gabrieli Family Fund (1998)</td>
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<td>Ganesh Fund (2002)</td>
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<td>Garuda Fund (2008)</td>
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<td>Brad Gatlin Family Fund (1996)</td>
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<td>Gaudette Family Fund (2000)</td>
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<td>The Dana Gavdila Fund (2021)</td>
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<td>The Gene Pool (2021)</td>
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<td>Gergen Family Fund (2010)</td>
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</table>
The 'Quin House is a social club in the Back Bay founded by Boston Foundation donors Sandy and Paul Edgerley. Sandy Edgerley is Chair Emerita of the Boston Foundation's Board of Directors. The Fund, co-chaired by experienced nonprofit leaders Linda Whitlock and Kanna Kunchala and led by Charlie Davies, was launched a year before the opening of the Club and focuses on five areas of community life: Art & Culture, Health & Human Services, Innovation & Impact, Youth & Education, and Equity, Inclusion & Opportunity. To date, the Quin Impact Fund has given out $500,000 to a number of important organizations across the city, including: The City of Boston’s Resiliency Fund, the Business Equity Covid-19 Emergency Fund, Camp Harbor View, Greater Boston Food Bank, MassChallenge, Wonderfund, Action for Boston Community Development, the Asian Community Fund and King Boston.
Chad & Lia Novotny Fund (2002)
Kathryn Novotny Fund (2007)
Nicholas Novotny Fund (2007)
Novotny/Ramirez Donor Advised Fund (2002)
Novotny/Swahnberg Fund (1998)
Barbara Rose O’Connor Charitable Fund (2018)
Vania K.E. O’Connor Fund (2019)
One Foot Plan (2015)
One Way Foundation (2020)
Orchard Hill Fund (2013)
The Oristaglio Foundation (2019)
E. Ostroff Fund for Service (2017)
Owen Marie Fund (2013)
Louise Burnham Packard Charitable Fund (2021)
Palmer Family Fund (2016)
Morgan Palmer Foundation (1982)
Parachute Fund (2019)
The Park Family Charitable Fund (2014)
Parker Family Fund (2001)
Field Parker Fund (1997)
Partnership Fund in honor of Anna Faith Jones (2001)
Alfred Nash Patterson Foundation for the Choral Arts Fund (1980)
Payson Family Fund (2001)
Peaceable Kingdom Fund (1998)
Robert C. Perkins Fund (2001)
Samuel Perkins and Nancy Reed Fund (1996)
Sheila and Sara Perkins Fund (1996)
Peter Fund (2001)
Petersen Family Fund (2002)
Phlancon Fund (1990)
Picard Family Fund (2000)
Michelle Picotte Foundation (2021)
Karen Odessa Piper Charitable Gift Fund (2014)
The Players Legacy Fund (2020)
Plimpton - Shattuck Fund (2006)
Pluhar Family Fund (2014)
Renata Poggioli Fund (1992)
The Poler Family Foundation (2009)
Pool Family Fund (1998)
Poorvu Jaffe Family Fund (2019)
Poss Family Fund (1996)
Helen C. Powell Donor Advised Fund (2015)
Primary Care Progress Fund (2012)
Thomas & Mary Prince Family Fund (2001)
Joseph G. Prone Foundation (2014)
Sue and Bernie Pucker Fund (2003)
Donald and Frances Putnoi Charitable Fund (2007)
Peg Pyne Fund for Handicapped Access (1986)
Quid Nunc Fund (2002)
The Quin Impact Fund (2020)
Radtke Family Fund (1997)
Phyllis and Jerome Lyle Rappaport Fund (2016)
The Tuukka Rask Foundation (2014)
Ravichandran Foundation (2019)
Gene Record Fund (2002)
Sara Delano Redmond Fund (1996)
The Reidy/Andre Fund (2019)
Relief Fund for Immigrant Families (2021)
Remmer-Fox Family Fund (1996)
Reno Family Charitable Foundation (1999)
Edward S. Reynolds Memorial Fund (1985)
Rhyme and Reason Fund (2001)
Roberts Family Fund (1996)
Roberts-Belove Fund (2005)
Todd Robinson and Steven Farrell Fund (2013)
Rosedune Fund (1971)
Rosen Family Fund (2008)
Lindsey A. Rosen Fund (2011)
Rossiter Family Fund (2018)
Daniel and Brooke Roth Charitable Gift Fund (2008)
Rothman Charitable Fund (2014)

**DONOR ADVISED FUND**

**ROSEN FAMILY FUND**

Mark and Etta Rosen have always given to numerous organizations and causes, but they also take a strategic approach to their philanthropy. Through their Donor Advised Fund at the Boston Foundation they have made significant contributions to the Institute for Nonprofit Practice, a one-year certificate-granting program for nonprofit leaders that equips them with the management and leadership skills they need to make their organizations effective and sustainable. The Institute is filling a self-reported skills gap in nonprofit sector leadership and brings a strong diversity lens to the work. Mark’s commitment to this organization goes far beyond philanthropy: He is Chair of the Institute’s Board of Directors. Mark and Etta also focus some of their philanthropy on the crucial area of early childhood—and are working actively with The Philanthropic Initiative, a Boston Foundation affiliate, to refine their philanthropic strategy and engage the next generation of their family in the enterprise.
Rotman-Attardo Family Fund (2006)
Rubin Steinberg Charitable Fund (2020)
Rust Bowl Fund (1988)
Saffron Circle Fund (2006)
David Salten Fund (2008)
Samuelson Family Gift Fund (2013)
Risha C. and Paul A. Samuelson Fund (1982)
Sands Family Fund (2012)
The Tedd R. Saunders Family (2021)
Susan F. Schaeffer Fund (2014)
Schawbel Family Fund (1995)
Margaret M. Schmidt and Kenneth J. Danila Fund (2005)
Joel Schwartz Family Fund (2001)
Schwinn Family Charitable Foundation (2011)
September Fund (2001)
A Servant’s Heart (2014)
Shapiro/Fleishman Fund (2000)
Shawkemo Fund (2001)
SheGives Fund (2015)
Bob and Jean Sheridan Family Fund (2013)
Sherman Family Foundation Fund (2005)
Jon Shevell Cancer Fund (2011)
Jon Shevell Children’s Fund (2011)
Jon Shevell Education Fund (2011)
Shoe Box Foundation Fund (2004)
Shot Fund (2020)
Peter Sidewater Foundation (2017)
Jean Karpas Siegel Fund (1995)
Silvia-Chandley Fund (2014)
John and Susan Simon Boston Foundation Fund (2007)
Sixty-Nine Roses Charitable Foundation (2011)
Skylight Fund (2000)
Fay Slover Fund (2011)
Ellin Smalley Fund (1988)
Austin & Susan Smith Fund (2000)
Anna and Jack Sommers Family Gift Fund (2018)
The Sparsh Foundation (2019)
Spector Fund (2002)
Spencer Family Charitable Fund (2015)
David F. Squire Family Fund (1998)
STAG Industrial Charitable Action Fund (2021)
Harvey & Shirley Stein Fund (2000)
Meg and Don Steiner Charitable Fund (2021)
Sternfeld Family Foundation (2020)
Tracy Stewart Fund (2009)
Jim Stiles & Randy Bird Charitable Trust (2019)
Congressman Gerry E. Studds Fund (2007)
Charles Sugnet Fund (1999)
Joshua Sugnet Fund (1999)
Suhbriev Family Fund (2006)
Nancy L. Sullivan Fund (1990)
Sunrise Fund (1993)
Sustainable Strategies 2050 Impact Fund (2020)
Sylvan Fund (1986)
TAF Device (2019)
The Third Base Fund (2019)
Marc Thompson & Maureen Conway Family Fund (2008)
Thomsen Family Fund (2001)
Susan and Michael Thonis Fund (2005)
Thornton Albukrek Family Fund (2020)
Scott and Jennifer Tobin Charitable Fund (2005)
Toms Family Fund (2016)
Trefler Fund (1997)
Upper Mill Fund (2019)
Sarah Valentini Foundation (2020)
Marlyn and Richard Victor Fund (2017)
Violet Iris Fund (2015)
James and Margaret Wade Fund (1997)
Linda M. Walczak Children’s Literacy Fund (2016)
Waldron Charitable Fund (2018)
Walker Fund (1999)
The Walter/Capone Fund (2011)
Ruth and Henry Walter Fund I, II & III (2011)
J. H. Walton Family Fund (1987)
Mitchell and Barbara Freedman Wand Charitable Fund (2014)
Anita Barker Weeks Charitable Gift Fund (2012)
Weiss Charitable Fund (2005)
Weitzman-Bugbee Family Fund (2021)
Wellesley Hills Congregational Church Outreach Fund (2007)
Whitehead - Sayare Fund (2008)
Guy and Maggie Wickwire Fund (1990)
James and Debra Wiess Fund (2013)
Benjamin J. Williams, Jr. Fund (1987)
Hope A. Williams Fund (1987)
Natica R. Williams Fund (1987)
Ralph B. & Margaret C. Williams Fund (1985)
Ralph B. Williams, II Fund (1987)
Williamson Charitable Fund (2016)
The Windy West Fund (2016)
Winkler Family Foundation Fund (2001)
Winn Family Charitable Fund (2016)
Wesley L. Winship Fund (1999)
Winsor Foundation Fund (1989)
Howard L. Wolf Memorial Fund (1981)
Michael N. Wood Fund (1997)
Christopher and Debra Wysopal Charitable Trust (2018)
Leila Yassa & David Mendels Fund (2001)
YotMe Donor Advised Fund (2018)
Zabin Charitable Fund (2001)
Emily Zofnass Fund (1998)
Zug Family Fund (2009)
Zwanziger Fund (2007)
The Zwanziger-Hoffman Fund (2018)
SUPPORTING ORGANIZATIONS

The year the fund was established is listed in parentheses.

Bruce J. Anderson Foundation (1981)
Deshpande Foundation (2007)
Horace Moses Foundation (1995) to Support Junior Achievement

SCHOLARSHIP FUNDS

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

Supporting Organizations have the continuing involvement of their founders, yet maintain public charity status through their affiliation with the Foundation.

The Laura Ahlbeck Memorial Scholarship Fund (2017)
Benjamin Foundation Scholarship Program (2017)
Blair Family AvalonBay College Scholarship (2013)
George C. Brackett STEM Scholarship (2016)
Prilla Smith Brackett Award (2018)
Alex Castoldi Memorial Scholarship Fund (1982)
The Cicolani Family Scholarship Fund (2018)
Paula Marie Danforth Memorial Scholarship Fund (1990)
deVille Fund (1995)
Eagle Bank-Frank E. Woodward Scholarship Fund (1986)
Americo J. Francisco Scholarship Fund (1994)
Albert Francis Gilmartin Memorial Scholarship Fund (2005)
Gladwood Scholarships (2018)
Greatrex Scholarship Fund (1989)
Charles Hammond Fund - Hanover (1972)
Charles Hammond Fund - Springfield (1972)
William R. Hanrahan Scholarship Fund (2021)
Janey Fund Scholarship Program (1999)
Manton Scholars (2017)
MFG Scholars Program (2019)
Francis P. Sears Scholarship Fund (1974)
Emily and Frank Smiddy Fund for Lexington Scholars (2020)
Waldron-Wayland Scholarship Fund (2019)
Paul & Eleanor Young Fund (1989)
Youth Business Institute Scholarship (2014)
DESIGNATED FUNDS

Designated Funds have been established to support specific, named organizations. Through these funds, many nonprofit institutions receive crucial annual support.

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

ACCESS Education Fund (1985)
Ad Club Foundation Fund (1988)
Fund for Adult Literacy (1985)
Rae and Aaron Alberts Foundation Fund (2003)
Rae and Aaron Alberts Foundation Fund II (2005)
Ames, IA Public Library Large Print Endowment Fund (2018)
Frank E. Anderson Fund (1976)
Red Auerbach Youth Foundation Fund (1983)
The Helena and Alfred Barthel “Peace on Earth” Endowment (2017)
Lilian G. Bates Fund (1952)
Bedford, MA Public Library Large Print Endowment Fund (2018)
Grace & Floyd Lee Bell Fund (1988)
Boston Medical Center Services Fund (2018)
Boston University School of Education Fund (2018)
Richard L. Bowser Fund (1985)
BPE/Hancock Endowment for Academics, Recreation & Teaching (1985)
BPE/Support for Early Educational Development Fund (1986)
Herbert Brandshaft Scholarship Fund (2008)
Annie L. Breckenridge Trust Fund (2000)
Brookline Youth Concerts Fund (1995)
Michael and Stella Buonsanto Charitable Fund (2013)
Charles T. Burke Fund for the Watertown Free Public Library (1995)
James F. Casey Fund (1950)
Dr. Walter Channing Memorial Fund (1934)

REMEMBERING FRANK FERGUSON

This year, the Greater Boston community lost a great education innovator and philanthropist. Frank Ferguson was co-founder of the education firm Curriculum Associates, based in Billerica. He served as President of the firm from 1976 until 2008, and then as the chairman until he retired in 2017. Curriculum Associates is a major education publishing company that has worked for more than 50 years to provide teachers with the dynamic materials they need to give every student the chance to succeed.

In 2017, thanks to Frank Ferguson, the Boston Foundation received the largest gift in its history: $50 million as part of the transfer of a majority investment in Curriculum Associates. It was a transformative gift to the Boston Foundation’s endowment, the Permanent Fund for Boston, and established a series of Designated Funds to support nonprofit organizations across the country. While our community has lost a great man, Frank Ferguson’s generosity and influence will be felt forever.
In response to the devastating earthquake in Haiti 11 years ago, the Boston Foundation and its donors responded within days by establishing the Haiti Relief and Reconstruction Fund, which made contributions totaling more than $2.5 million to programs in Haiti and Greater Boston, home to the country’s third-largest Haitian community. So many lessons were learned during that period about the importance of working closely with the Haitian people themselves that a permanent organization, Haiti Development Institute (HDI), was formed to expand and deepen that work. Led by Executive Director Pierre André Noël, HDI has empowered local leaders, organizations and social entrepreneurs with the skills, tools, resources and connection they need for successful community development. Following the August 14 earthquake in Haiti’s south, HDI is channeling life-saving resources to local organizations to help devastated rural communities recover and reduce their vulnerability to future disasters, again with the generous support of Boston Foundation donors.
Lawrence B. Lewis Fund (1958)
Lexington, MA Public Library Large Print Endowment Fund (2018)
Lincoln, MA Public Library Large Print Endowment Fund (2018)
Ralph Lowell Fund (1983)
MHEAC Fund for ACCESS (1987)
Dorothy Morse Endowment Fund (2000)
Harry D. Neary Fund (1951)
Roger L. Nichols Internship Program Fund (1985)
William H. Nichols Fund For Chemistry (2017)
Lottie S. Page Fund (1985)
William Morgan Palmer Fund (1978)
Harold Peabody Memorial Fund (1993)
Permanent Fund for Vocational Education (1979)
John M. Pero Scholarship Fund (2015)
Charles & Cornelia Pfaff Fund (1965)
Henry L. Pierce Fund (1959)
Emma K. & Richard Pigeon Fund (1956)
The Plimpton-Poorvu Design Prize Fund (2015)
Pozen Prize for Innovative Schools (2014)
Primary Care Fellowship Program Fund (1983)
Pylone Chantha Orphanage Project (2020)
The Quincy High School Class of 1973 Memorial Scholarship Fund (2021)
Reading Visiting Nurse Association Fund (1977)
Rockport Music Fund (2018)
Rogers Fund of the Riverside Cemetery (1998)
Henry A. Root Fund (1927)
Rose Fund (1982)
Dr. Jordan S. Ruboy Charitable Fund (2014)
Sheep Pasture Fund (1994)
Bessie H. Short Fund (1997)
Dana P. & Maude E. Simpson Memorial Fund (1999)
Michael Spock Community Service Fund (1981)
Alison L. Stevens Fund (1977)
Eva and William Stillman Scholarship Fund (2014)
Surfmen's Trust Fund (1978)
Agnes & Lewis Taylor Fund (1963)
Frank B. Thayer Fund (1977)
Pauline Toumpouras Fund (2010)
Tsuda College Fund (2018)
David J. Tuttle, Jr. ALS Fund (2016)
David J. Tuttle, Jr. MIT Fund (2016)
Connell Family Fund (2001)
Carol R. & Avram J. Goldberg Fund (2002)
Lawrence & Beth Greenberg Fund (2001)
The Kraft Family Fund (2001)
Margarete McNeice Fund (2001)
Schoen Family Fund (2000)
Tom & Nancy Shepherd Fund (2001)
State Street Foundation Fund (2001)
J.C. Tempel Fund for Children (2001)
Vinik Family Fund (2001)
Peter and Pamela Voss Fund (2001)
Robert E. Wallace Memorial Fund of the Urban League (1992)
Inez Washabaugh Ward, PNP, Scholarship Fund (2011)
Bradford Washburn Fund (1980)
Bill and Estelle Watters Fund (1997)
Jane Wengren Fund (1980)
The George J. Westwater and Genevieve A. Westwater (nee Lennon) Fund (2021)
Stetson Whitcher Fund (1987)
Wiener Fund (2009)
May J. Wikstrom Fund (1999)
Michael N. Wood Legacy Fund (2021)
Rudolph & Sara Wyner Prize Fund (1986)
The Boston Foundation works closely with professional advisors in the Greater Boston area to support them and their clients in all aspects of philanthropic giving. We would like to acknowledge the contributions of our Professional Advisors Committee and Professional Advisors Network, who together with Boston Foundation staff advocate for the value of philanthropy and examine innovative mechanisms for high impact charitable planning.

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With the unparalleled challenges facing our city, region and world today, thoughtful, effective philanthropy is more important than at any time in the Boston Foundation’s history. We work in close partnership with our donors—generous individuals, families, companies and entrepreneurs, all deeply committed to the community of Greater Boston. They find a platform for their charitable giving at the Boston Foundation because, like them, we measure philanthropy by impact created, not just dollars given.

**SUPPORTING SYSTEMIC CHANGE THROUGH CIVIC LEADERSHIP**

By working with the Boston Foundation, you become an important part of Greater Boston’s civic leader. Through research, forums and policy leadership, the Boston Foundation has helped to leverage hundreds of millions of dollars in federal and state funds, restructure our community college system, provide crucial state funds for cultural facilities and inform groundbreaking criminal justice legislation. This work is supported by the Annual Campaign for Civic Leadership, to which more than 500 generous donors contributed last year.

**HELPING YOU SHAPE YOUR LEGACY**

You don’t need millions to leave a legacy gift and have a lasting impact. Through careful estate and succession planning, funds of any size can create a legacy while helping you realize financial and tax benefits. Your legacy gift to the Permanent Fund for Boston will support the most pressing issues of the day, whatever those issues may be, decades or centuries into the future. There are many ways to accomplish your goals, and we look forward to being your partner in this work.

**STREAMLINING YOUR PHILANTHROPY THROUGH A DONOR ADVISED FUND**

If you want to give confidently and have the greatest impact on the causes you care about most, whether in Greater Boston or around the globe, we will work with you to make it happen. For more than 30 years, the Boston Foundation has been an expert provider of Donor Advised Funds. Establishing a fund here is ideal for those who want the benefits of a private foundation with none of the administrative, legal, tax or regulatory burdens.

**HELPING COMPANIES GIVE LOCALLY, NATIONALLY AND INTERNATIONALLY**

Partnering with the Boston Foundation for your company’s giving is an easy and dynamic way to maximize your impact on the communities you serve. We can customize a suite of services to assist with launching or growing your company’s giving program—in Greater Boston, nationally or internationally. Opening a Company Donor Advised Fund at the Boston Foundation is an efficient and effective alternative to establishing a corporate foundation. The Foundation also encourages entrepreneurs to join Pledge 1% Boston to weave philanthropy into the fabric of their companies from the very beginning.
MAXIMIZING YOUR GIVING WITH THE PHILANTHROPIC INITIATIVE

A pioneer in the field of strategic philanthropy for 30 years, The Philanthropic Initiative (TPI) is an internationally recognized provider of philanthropic consulting and management services. Under the umbrella of the Boston Foundation, TPI offers strategic advising to private foundations, families, individuals and corporations here and around the globe.

Building from the values and interests of each client, TPI delivers innovative, customized solutions that help clients maximize the impact of their philanthropy by defining priorities and strategies, implementing programs and evaluating success.

GETTING STARTED

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

For more information about becoming a donor by opening a Donor Advised Fund, contributing to our Annual Campaign for Civic Leadership or making a planned or legacy gift, contact us at 617-338-2213 or donorservices@tbf.org.

Legacy gifts to the Foundation’s endowment, the Permanent Fund for Boston, have supported every area of community life in Boston through two world wars, two pandemics and every other challenge the city has faced over the last 106 years.
Applying for a Grant

**FUNDING OPPORTUNITIES**

The Boston Foundation’s Programs Department is committed to making a profound and measurable impact on the Greater Boston community through our grant-making. Our grants are organized by five targeted Impact Areas, our responsive Open Door Grants program, and other programs within our Social Justice Ecology framework, which supports community leaders, movements and nonprofit infrastructure. A number of grants and strategic investments also are made to special issue-focused initiatives. We have a deep dedication to viewing all of our work through a racial equity lens and by valuing the lived experiences of those we seek to partner with and serve.

The Foundation’s discretionary grantmaking, which is overseen by our Programs staff and monitored and approved by our Board of Directors, represents about 18 percent of the Foundation’s overall giving; the remainder is directed by our donors through Donor Advised Funds. The allocation of more than $15 million in discretionary grants each year is made possible by our endowment, the Permanent Fund for Boston, which has been built over the years through outright gifts and bequests from hundreds of generous donors and community members who care deeply about the lives of Greater Boston residents.

Since 2009, the Boston Foundation has invested the bulk of its discretionary grantmaking resources in partners and programs focused on five Impact Areas:

- **EDUCATION**
- **HEALTH & WELLNESS**
- **JOBS & ECONOMIC DEVELOPMENT**
- **NEIGHBORHOODS & HOUSING**
- **ARTS & CULTURE**

Our ongoing and strategic grantmaking within these Impact Areas is informed by research we have commissioned and by our civic leadership work in general.

In addition, discretionary grantmaking supports programs within our Social Justice Ecology framework. Through this work, our goal is to help inform and strengthen the conditions that allow social justice to thrive in Greater Boston by providing access to resources and support for people, movements and nonprofits working to disrupt persistent structural and institutional racism and encourage racial equity and justice.

We remain responsive to community and nonprofit needs beyond our strategic focus areas through our application-driven Open Door Grants program, which responds to expressed opportunities and needs in the communities we serve.

Visit [www.tbf.org/nonprofits](http://www.tbf.org/nonprofits) for more information about all of our funding opportunities and detailed guidelines that will help you apply for a grant.

Immigrant Family Services Institute serves Haitian students and families in Mattapan, which has the largest Haitian population in Massachusetts.
The Boston Foundation has a mandate both to fulfill its role as Greater Boston’s community foundation today—by maximizing the dollars available for making grants—and ensuring that the charitable dollars entrusted to the Foundation are available to continue this work tomorrow and in perpetuity. Robust development efforts and a well-diversified investment strategy enable the Foundation to meet these objectives.

**FUND FOR THE 21ST CENTURY**

The Boston Foundation offers four separate investment pools within the Fund for the 21st Century. These four 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 four pools. The pools include the Balanced Plus Pool, the Balanced Pool, a recently launched Impact Pool and the Short Term Pool. 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 Balanced Plus Pool assets include global stocks, investments with flexible capital managers, private equity, venture capital, real estate, and treasury securities. Diversification among multiple asset classes should help to reduce the volatility of the Foundation’s investment returns.

### INVESTMENT PERFORMANCE

(June 30, 2021)

<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>
<th>15 YEARS</th>
<th>20 YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balanced Plus Pool</td>
<td>35.3%</td>
<td>12.6%</td>
<td>11.8%</td>
<td>8.5%</td>
<td>7.1%</td>
<td>6.9%</td>
</tr>
<tr>
<td>Balanced Pool (established 2/1/11)</td>
<td>22.9%</td>
<td>9.1%</td>
<td>8.9%</td>
<td>6.6%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Impact Pool (established 6/1/20)</td>
<td>29.5%</td>
<td>n/a</td>
<td>n/a</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>0.09%</td>
<td>1.4%</td>
<td>1.2%</td>
<td>0.6%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

**Benchmarks:**

<table>
<thead>
<tr>
<th>Benchmark</th>
<th>1 YEAR</th>
<th>3 YEARS</th>
<th>5 YEARS</th>
<th>10 YEARS</th>
<th>15 YEARS</th>
<th>20 YEARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTSE World Bond Index</td>
<td>0.8%</td>
<td>3.6%</td>
<td>1.7%</td>
<td>1.4%</td>
<td>3.4%</td>
<td>4.6%</td>
</tr>
<tr>
<td>65% MSCI A.C. World/35% FTSE World Bond Index</td>
<td>24.7%</td>
<td>11.0%</td>
<td>10.2%</td>
<td>7.1%</td>
<td>6.4%</td>
<td>6.7%</td>
</tr>
<tr>
<td>MSCI All Country World Stock Index</td>
<td>39.3%</td>
<td>14.6%</td>
<td>14.6%</td>
<td>9.9%</td>
<td>7.6%</td>
<td>7.3%</td>
</tr>
<tr>
<td>S &amp; P 500 Stock Index</td>
<td>40.8%</td>
<td>18.7%</td>
<td>17.6%</td>
<td>14.8%</td>
<td>10.7%</td>
<td>8.6%</td>
</tr>
</tbody>
</table>
**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 2021 spending policy input rate was 5.25% for its permanently restricted discretionary funds. For Fiscal Year 2022, the Board approved a spending policy input rate of 5.00% for its discretionary endowment. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the spending policy input rate applied to the current market value. The approved spending policy input rate for designated endowment funds remained at 5% for Fiscal Year 2022.

**THE PHILANTHROPIC INITIATIVE**

The Philanthropic Initiative, Inc. (TPI) is a significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI significantly expands the range of philanthropic services the Foundation offers. During Fiscal Year 2021, the operations of TPI added $2.9 million of service fee income to the operations of the Foundation.

**FINANCIAL ANALYSIS**

Total assets of the Boston Foundation were $1.7 billion at June 30, 2021. For the year, net investment returns for the Balanced Plus Pool were 35.3%. Total investment returns were $371 million. During this same period, the Foundation received $309 million in contributions and paid $170 million in grants. Other expenses totaled $27 million, thus explaining the change in total assets.

**FINANCIAL STATEMENTS**

The Foundation’s financial statements are prepared in accordance with policies and procedures overseen by the Foundation’s independent Audit Committee and the Board of Directors.

A summary of the financial statements is shown on the following page. The statements and Form 990 are available on our website at www.tbf.org.
## 2021 AND 2020 SUMMARY FINANCIAL STATEMENTS
(in thousands)

### ASSETS:

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments</td>
<td>$1,645,019</td>
<td>$1,156,978</td>
</tr>
<tr>
<td>Cash &amp; Equivalents</td>
<td>12,561</td>
<td>13,504</td>
</tr>
<tr>
<td>U.S. Treasury Notes</td>
<td>25,598</td>
<td>27,127</td>
</tr>
<tr>
<td>Receivables &amp; Other</td>
<td>26,506</td>
<td>24,921</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$1,709,684</strong></td>
<td><strong>$1,222,530</strong></td>
</tr>
</tbody>
</table>

### LIABILITIES & NET ASSETS:

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable &amp; Other Liabilities</td>
<td>$8,135</td>
<td>$7,765</td>
</tr>
<tr>
<td>Grants Payable</td>
<td>5,056</td>
<td>1,418</td>
</tr>
<tr>
<td>Net Assets</td>
<td>1,696,493</td>
<td>1,213,347</td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td><strong>$1,709,684</strong></td>
<td><strong>$1,222,530</strong></td>
</tr>
</tbody>
</table>

### REVENUES:

<table>
<thead>
<tr>
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<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$308,694</td>
<td>$168,641</td>
</tr>
<tr>
<td>Service Fee Income</td>
<td>2,240</td>
<td>1,998</td>
</tr>
<tr>
<td>Net Investment Return</td>
<td>370,563</td>
<td>1,671</td>
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<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>681,497</strong></td>
<td><strong>172,310</strong></td>
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### GRANTS & EXPENSES:

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$174,222</td>
<td>$215,240</td>
</tr>
<tr>
<td>Change in Split Interest Trusts</td>
<td>(363)</td>
<td>499</td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>24,492</td>
<td>25,978</td>
</tr>
<tr>
<td><strong>Total Grants &amp; Expenses</strong></td>
<td><strong>198,351</strong></td>
<td><strong>241,717</strong></td>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Net Assets</td>
<td>483,146</td>
<td>(69,407)</td>
</tr>
<tr>
<td>Net Assets Beginning of Year</td>
<td>1,213,347</td>
<td>1,282,754</td>
</tr>
<tr>
<td><strong>Net Assets End of Year</strong></td>
<td><strong>$1,696,493</strong></td>
<td><strong>$1,213,347</strong></td>
</tr>
</tbody>
</table>

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

Writer and Editor: Barbara Hindley
Designer: Kate Canfield, Canfield Design
Photographer: Richard Howard

Printed by Kirkwood