

EQUITY

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.

ABOUT THE BOSTON FOUNDATION

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.

Welcome

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

] CLOSING THE GAP [

Health

“**C**ommunity 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.”

“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.

— Michael Curry



AN OUTGROWTH OF THE WAR ON POVERTY IN THE MID-1960s, MASSACHUSETTS HAS 52 COMMUNITY HEALTH CENTERS SERVING MORE THAN A MILLION PEOPLE AT SOME 300 PRACTICE SITES.



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.



[HEALTH EQUITY IN ACTION]

Popup Vaccination Clinics

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

] CLOSING THE GAP [

Housing

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.

“Whether it’s building or preserving housing, we deeply believe in working closely with community members so that we can respond to real needs. 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.”

“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.

— 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 Dianyv 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.”

[HOUSING EQUITY IN ACTION]

Public Spaces in Chinatown

“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.”

“Our goal is to promote self-determination and counter gentrification in Chinatown. We really want to engage folks who are usually missing at the decision-making table.

— Jeena Chang

] CLOSING THE GAP [

Arts

“**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.”

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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.



[ART EQUITY IN ACTION]

Open Mics and Flash Mobs

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

] CLOSING THE GAP [

Wealth

“**T**here 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.”

“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.

— Orlando Watkins



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.”



[WEALTH EQUITY IN ACTION]

STASH

Saving Toward Affordable Sustainable Homeownership

W

hen **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.”

“Most Black people I know want to own their own home, but 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.

— *Symone Crawford*

] CLOSING THE GAP [

Education

W

hen **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.”

“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.”

— *Kristin McSwain*



THE BOSTON OPPORTUNITY AGENDA WAS FOUNDED IN 2010 AS A PUBLIC/PRIVATE PARTNERSHIP TO WORK URGENTLY AND STRATEGICALLY TO TRANSFORM OUR EDUCATION LANDSCAPE FROM CRADLE TO CAREER.



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.



[EDUCATION EQUITY IN ACTION]

Success Boston

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.

“The pandemic was hard on college students, especially those 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.

— Joél Mora

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.

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\$10,000-\$24,999

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CORPORATE DONOR TO THE ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP

ADVENT INTERNATIONAL

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."



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DONORS TO THE ANNUAL CAMPAIGN FOR CIVIC LEADERSHIP

PHILLIP GROSS AND ELIZABETH COCHARY GROSS

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."



GROWING THE PERMANENT FUND FOR BOSTON

DONORS WHO HAVE GIVEN \$1 MILLION OR MORE

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

At the heart of everything the Boston Foundation has accomplished this year—and every year for more than a century—is the Permanent Fund for Boston. This essential fund was established through bequests left by forward-thinking Bostonians and has been strengthened by outright gifts. It supports innovative work in the arts, education, health, housing, workforce development and other important areas of civic life.

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CENTENNIAL CIRCLE DONOR

ROBERT K. KRAFT AND FAMILY



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.

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Estate of Maria Corinne Dana (1963)
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Estate of Arthur S. Cummings (1943)
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Estate of Grace Scott Hollett (2005)
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Estate of Joseph A. White (1979)
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Estate of Lizzie A. Williams (1951)
Estate of Mary Denny Williston (1998)
Winston Salem Foundation (1991)

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

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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
Peni Garber
Brian Hyde
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John C. Keogh
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Mark and Grace Sullivan

**Deceased*

CENTENNIAL SOCIETY DONORS

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.



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.

LONGLEY LEGACY SOCIETY

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 Jossie 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*

ROGERSON LEGACY SOCIETY

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

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

*Deceased

ROGERSON LEGACY SOCIETY DONOR

THOMAS A. KERSHAW

Thomas Kershaw is a giant in the hospitality and tourism industries, as head of the Hampshire House Corporation, which owns the Hampshire House, a private venue for special events, Cheers, (formally The Bull & Finch pub, which inspired the setting of the hit television series), and the Cheers Set Bar (a replica of the Cheers TV show bar), both located in the Hampshire House, as well as the restaurants 75 Chestnut and 75 on Liberty Wharf. He has also served on numerous nonprofit boards. When Kershaw decided that he wanted to leave a meaningful legacy to the numerous nonprofit organizations that had touched his life over the years, he made a planned gift to the Boston Foundation. Among the nonprofits included in his planned gift are The Boy Scouts of America, which he credits with contributing to his work ethic, Bunker Hill Community College Foundation, of which he is a founding member, and the USS Constitution Museum where he sits on the board.



Funds

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)
Franklin S. & Cynthia B. Browning Fund (1989)
Frank B. & Watson G. Cutter Fund (1984)
James Dean Fund (1947)
Katherine E. Dooley Fund (1998)
Herbert and Lucy Fields Fund (2009)
Edward Glines Fund (1939)
Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2010)
Nathaniel Hooper Fund (1939)
Grace A. Jacobs Fund (1989)
Karoff Fund for Leadership in Philanthropy (2017)
Michael B. Keating Fund for Justice and Social Equity (2016)
Thomas F. Lambert, Jr. and Elizabeth Branon Lambert Fund (2007)
Polaroid Fund (1997)
Ruth M. Reiss Memorial Fund (1997)
Samuel H. & Lizzie M. Robie Trust Fund (1983)
Walter J. & Marjorie B. Salmon Fund (1999)
Robert Wadsworth Fund for the Future of Boston (2008)

UNRESTRICTED FUND

REVEREND RAY A. HAMMOND FUND FOR THE NEIGHBORHOODS OF BOSTON



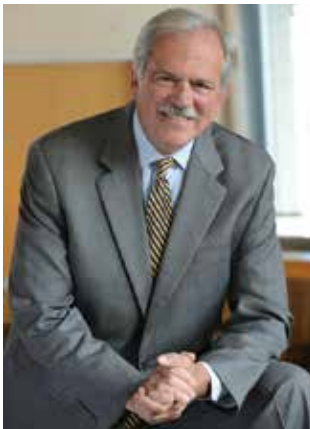
Reverend Dr. Ray Hammond served as the Chair of the Board of Directors of the Boston Foundation from 2002 to 2009 and had a profound effect on the Foundation's work in the Greater Boston community. When his term as Chair ended, the Board of Directors created the Rev. Ray A. Hammond Fund for the Neighborhoods 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)
 Arts Fund (1998)
 Edith Allanbrook Fund (2003)
 Boston Parks Access Fund (2003)
 Free for All Endowment Fund (2014)
 Edward Hyde Cox Fund (2001)
 Anna Faith Jones Arts Fund (2001)
 MassDevelopment Arts Fund for Community and Economic Development (2003)
 Stephen and Sybil Stone Arts Fund (2003)
 Brother Thomas Fund (2008)
 Brooks White, Jr. Memorial Fund (2001)
 Edith M. Ashley Fund (1961)
 Asian Community Fund (2019)
 Diane Heath Beever Memorial Fund (2008)
 J. E. Adrien Blais Fund II (1968)
 J. E. Adrien Blais Fund III (1968)
 BOSTnet Fund (2020)
 Emily Budd Fund (1961)
 Business Equity COVID-19 Emergency Fund (2020)
 Business Equity Fund (2018)
 Camping Associates of Roslindale & Milton Fund (1982)
Carpe Diem Fund (2021)
Chelsea 2021 Fund (2021)
 Communities Care WNY Respite Pilot (2020)
 Coolidge Christian Education Fund (1994)
 COVID-19 Equity and Entrepreneurship Fund (2020)
 Covid-19 PPE Fund (2020)
 COVID-19 Response Fund (2020)
 Curtis International Council Fund (2000)
 David W. Cushing Fund (1988)
 DACA Dream Fund (2018)
 Mabel Walsh Danforth Fund (1950)
 Virginia Herrick Deknatel Fund for Children's Services (2002)
 Major Arthur M. Diggles Foundation Fund (1993)
 Annie S. Dillaway Fund (1966)
 Kate Ellis Fund (1954)
 Equality Fund (2012)
 Mary C. Farr Arts Fund (2006)
 The Flow Fund (2015)
Forward Fund (2021)
 Frederika Home Fund (1980)
 General Support Fund for Education (1989)
 Elizabeth D. Goldsmith Fund for Families (2011)
 Hack.Diversity (2017)
 Charles W. Hapgood Trust Fund (1987)
 Harcourt Family Fund (2002)
 Mary Harris Fund (1941)
 Grace L. Holland Fund (2008)
 Theodore C. Hollander Trust Fund (1929)
Invest for Better Fund (2021)
 Jacoby Club of Boston Fund (1984)
 Jamaica Plain Dispensary Fund (1963)
 Charles Frederick Joy and Dora Marie Joy Fund (1993)
 Vera Kilstein and Sarra Victorine Fund (2019)
 King Boston (2018)
 Kraft Family Non-Profit Emergency Fund (2016)
 Louise P. Kush Fund (2016)
Lahey Family Fund (2021)
 Edith Shedd Larsen Fund (1963)
 Latino Equity Fund (2012)
 MAAH Stone Book Prize Fund (2019)
 Maude A. MacNaught Fund (1980)
 Azad & Doris Maranjian Charitable Trust Fund (2009)
 Massachusetts Civic League Fund (1984)
 Massachusetts United for Puerto Rico (2018)
 Willis Munro Fund (1990)
 Harry L. Nason Fund (1954)
 Florence Arnaud Newton Fund (1956)
 Grace G. North Fund (1955)
 Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006)
The Paul S. Grogan Fund for Civic Leadership (2021)
 Norman Everett Pearl Fund (1997)
 Janet S. & George T.B. Perkins Fund (2000)
 Petersen Family Fund for the Environment (2016)
 Louise Phillips Bequest Fund (2003)
 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)
 Arthur L. Sherin and Frances C. Sherin Fund (2003)
 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 Denny 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.

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)
Adopt-A-Statue Endowment Fund (1988)
Adopt-A-Statue Program - Bill Russell Legacy Project (2014)
The Ajax Foundation (2020)
AK Family Charitable Fund (2021)
The Akili Fund (2016)
James F. Alenson Memorial Fund (2007)
Aley Fund (2010)
Aliad Fund (1994)
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1996)
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)
Michael & Ellen Angino Fund (1998)
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)
Jennifer Winn Aronson Philanthropy Fund (2019)
Artful Impact Fund (2020)
Atalaya Fund (2013)
Atlantic Fund (1998)
Ausschnitt Fund (2005)
The Christopher A. Avery Charitable Fund (2020)
Victoria J. Avery Charitable Fund (2015)
Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)
Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
The Ayres Family Fund (2020)
Back Porch Fund (2015)
Bagley Family Fund (2016)
Bain Capital Relief Fund (2018)
Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)
M. Baldwin Family Fund (2016)
John & Judith Barber Fund (2003)
Richard Allan Barry Fund (2003)
Hanna and James Bartlett Fund (2015)
Baudanza Family Fund (1998)
Baupost Group Charitable Fund (2004)
Beachcomber Fund (2008)
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)
NICSA/William T. Blackwell Scholarship Fund (1995)
Emmanuel and Jane Blitz Fund (1993)
Blue Piano Fund (2018)
Tom and Lisa Blumenthal Family Foundation (2006)
Joan T. Bok Fund (1998)
Bolze Family Fund (2013)
The Bonomo Family Fund (2017)
David Bor and Henrietta Barnes (2018)
BPE/Bank of Boston 200th Anniversary Fund (1983)
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)

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.

Peter W. and Ruth H. Brooke Fund (2004)
The Christine A. Brown Fund (2019)
Brumme Family Fund (2018)
Bill and Barbara Burgess Fund (2003)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1989)
Kairos Butler Fund (1994)
Butler's Hole East (2012)
Butler's Hole Fund (1995)
Butler's Hole North (2012)
Butler's Hole South (2012)
C & K Foundation Fund (2000)
Norman L. Cahners Fund (1984)
The Cali-Evett Family Fund (2020)
Campbell Foundation Fund (2003)
Krystle Campbell Memorial Fund (2013)
James E. Canales and James C. McCann Fund (2018)
Carbonite Charitable Fund (2018)
The Carlson Stone Foundation (2020)
Margaret W. Casey Fund (1987)
John J. Cattaneo III Fund II (2017)
Celebrate Zoe's Life Fund (2021)
Champa Charitable Foundation Fund (2003)
Charlesbank Donor Advised Fund (2020)
Charlestown Benevolent Fund (2011)
Charlestown Fund (2009)
Chasin/Gilden Family Fund (2000)
Charles Ezekiel and Jane Garfield Cheever Fund I & II (2006)
Chelsea Community Fund (1998)
Joyce Chen and Helen Chen Foundation Fund (1995)
Cherry Stone Archives Fund (2011)
Chertavian Family Fund (2006)
The Mitchell D. Chester Memorial Fund (2018)
Christ on Earth Fund (1989)
Michael W. Christian Memorial Fund (1987)
Dr. & Mrs. B.U. Chung Fund (2000)
Chung Family Fund (2000)
Churchill Family Fund (1997)
Circle Fund (1998)
Civic Engagement Fund (2011)
CJE Foundation Fund (2007)
Clark Family Fund (2011)
Clementine Fund (2015)
Coit Family Fund A (2002)
Colby Charitable Fund (1981)
Colin's Joy Project (2019)
Colony Road Fund (1997)
Commonwealth Children's Fund (2018)
Condor Street Fund (1989)
Karen and Brian Conway Fund (2017)
The Pat Cooke Fund (2016)
Coolidge Family Fund (1982)
Cooper Leaser Family Fund (1997)
The Ann & Will Cordis Fund (2019)
Stephanie Dodson Cornell and James Cornell Family Foundation (2016)
Corvelli Fund (1996)
Constance and Lewis Counts Fund (1991)
Demetrios G. C. & Kimberly A. Coupounas Fund (1997)
George D., Angelyn K. & Demetrios G. C. Coupounas Fund (1995)
Christopher H. Covington and Bonnie G. Covington Fund (2020)
Jessie B. Cox Charitable Trust Fund (2009)
Cox Legacy Fund (2010)
Coxhead Family Foundation (2017)
Joseph and Nancy Craven Family Fund (2014)
Cregan Charitable Fund (2005)
Crosby Family Fund (2000)
Kate Crozier Fund (2008)
Cuming Family Endowment Fund (1996)
Tarrant and Laura Cutler Charitable Gift Fund (2009)
John Da Silva Memorial Fund (1989)
Dainger Fund (1998)
Dammann Boston Fund (2004)
Lawrence B. and Elisabeth T. Damon Charitable Fund (2014)
Darling Family Fund (1983)
Jeff and Dana Davis Charitable Fund (2020)
Kimberly Dawson Charitable Fund (2012)
John H. Deknatel Family Fund (2010)
Marshall and Laura Derby Charitable Fund (2008)
Rebecca Derby and Evan Morton (2008)
Sarah Derby and Gary MacDonald (2008)
DeWolfe Family Fund (2001)
Dibble Family Fund (2006)
Larry DiCara Fund (2006)
Dillon Fund (2005)
Dintersmith-Hazard Foundation Fund (2007)
Doe Noordzij Fund (2002)
Eugene B. & Nina L. Doggett Charitable Fund (2000)
Eric Dolinski & Kristen Ploetz Fund (2015)
Marthanne Dorminy Fund (2015)
Drane Center Fund (2002)
Douglas Drane Family Fund (1984)
Dretler Family Fund (2018)
Dryfoos Family Fund (2013)
William J. Ducas Charitable Fund (2012)
Bill and June Duggan Fund (2017)
Rebecca F. Duke Charitable Fund (2016)
Dupre-Nunnally Charitable Gift Fund (2007)
The Eagle Fund (2001)
Ecclesia Mission Fund (2013)
Edgerley Family Fund (2012)
Gregory J. Egan Donor Advised Fund (2019)
Egozy Fund (2007)
Eisenson Family Fund (2005)
Stephen J. Elledge (2017)
Elliott and Yu Education Fund (2012)
Ellis Family Fund (2003)
Elphaba Fund (2014)
Elpus Family Fund (2015)
Elving-Carr Family Fund (2016)
Employment Retention Fund (2004)
The Ethic, A Wealth Bank Fund (2021)
Ethics Trust Fund (1994)
Connor Evans Fund (2018)
Evans Family Fund (2000)
Norris and Constance Evans Family Charitable Fund (2000)
Taylor Evans Fund (2018)
The Ewing Family Fund (2014)
Faber Daeufer & Itrato Fellowship Program (2017)
Peter and Ellen Fallon Fund (1998)
The Farlovia Fund (2017)
Carol Fazio Charitable Fund (2011)
The Fialkow Family Foundation (2020)
First Principle Fund (2006)
Fish Family Fund (2010)
The Donald R. and Barbara A. Fisher Family Charitable Fund (2020)
Fishreys Family Philanthropic Fund (2000)
Jack Florey Fund (2005)
Flower Hill Fund (2012)
Foote-Richards Family Foundation (2014)
Footpath Fund (2019)
Forshey Family Fund (1998)
James & Audrey Foster Charitable Foundation (2018)
Free for All Concert Fund (2011)
Niki & Alan Friedberg Fund (1987)
Fulkerson Family Fund (1999)
Lyle W. Fulkerson Fund (1999)
Sarah Fulkerson and Robert Le Roy Family Fund (1999)
Fuller Trust, Inc. Fund (2010)
Future Fund (2006)
Gabrieli Family Fund (1998)
Galilean Fund (2008)
Ganesh Fund (2002)
Gannon Family Charitable Fund (2004)
Gannon Family S.U.N. Fund (2010)
Garuda Fund (2008)
Brad Gatlin Family Fund (1996)
Gaudette Family Fund (2000)
The Dana Gedvila Fund (2021)
The Gene Pool (2021)
Gergen Family Fund (2010)

D O N O R A D V I S E D F U N D

THE QUIN IMPACT FUND

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.



Gilbert Fund (2008)
Ginsberg/Kaplan Fund (2011)
Giudice Family Fund (2012)
Glassman Gale Family Fund (1985)
John & Ethel Goldberg Fund II (1984)
Golden Family Fund (2001)
Diana and Daniel Goldman Family Foundation (2020)
Elizabeth Goldman Foundation (2021)
Kate Goldman Foundation (2021)
Rachel Goldman Foundation (2021)
Goldstein-Allen Fund (2019)
Peter G. Gombosi Memorial Fund for Autism Research and Services (2006)
The Goodman-Swindell Family Foundation (2015)
Goodworks Fund (2003)
Gordon Educational Fund (2002)
Gordon Place Charitable Fund (2012)
Sandra & Philip Gordon Family Foundation Fund (2002)
Laurie Gould and Stephen Ansolabehere Fund (2010)
Gravelley Springs Fund (2006)
Green Fund (2011)
Greenhill Family Charitable Fund (2014)
Grogan Fund (2012)
Elizabeth and Phillip Gross Family Foundation (2015)
Patricia H. Gross Fund (2000)
Grunebaum Charitable Fund (2007)
Gualala Fund (1991)
Guenzel-Pieters Family Fund (2009)
Charles & Dorothy Gullickson Fund for Social Change (1999)

Jay Habegger Fund (2005)
Belle Linda Halpern Family Fund (2013)
The Kathryn Hannigan Fund (2019)
The Matthew J. Hannigan Fund (2019)
Ken and Becky Hansberry Fund (2001)
Charlotte C. Hart Family Fund (2002)
Kirk B. Hartung Fund (2021)
Caitlin Haught Foundation (2021)
J. Allan Hauter Memorial Fund (2004)
Head Of The Charles Regatta Fund (2021)
Hebb Charitable Fund (2004)
HEIRS Fund (1997)
Henderson Fund (1997)
The Hesperia Fund (2016)
Hewitt Family Charitable Trust Fund (1994)
The Hidden Garden Fund (2016)
Hidden History Fund (2017)
Higgins Endowed Fund (2012)
Higgins Family Fund (2014)
Ann S. Higgins Fund (2002)
Hildreth Stewart Fund (2013)
Joanne K. Hilferty Fund (2017)
Lucius T. Hill III and Wendy Y. Hill Fund (2001)
Petie Hilsinger Fund (2000)
Marc Hirschmann Foundation Fund (2002)
Hoffman Fund (1987)
Holberger Family Fund (1994)
Holland Family Fund (1994)
Emily C. Hood Fund (2012)
Gilbert H. Hood Family Fund (1981)
Robert Hooper Family Fund (2005)
The Hot Chocolate Fund (2018)

Hourless Fund (1998)
Hamblin L. Hovey Institute Fund (1983)
Howe Family Fund (2021)
Hoyt Family Fund (2001)
Hunt Fund for Charlestown Children (2002)
Brian R. Hyde Foundation (2018)
Income Research and Management Charitable Fund (2014)
Interstitial Fund (2010)
The Irza-Leggat Family Charitable Gift Fund (2018)
J. Jill Compassion Fund (2002)
Jacks Family Fund (2021)
Mitchell & Diane Jacobs Fund (1999)
Jade Fund (2008)
JAHELBE Fund (2002)
The Jampart Fund (2020)
JDJ City Fund in honor of Doreen Biebusch (2021)
The Jerome Avenue Fund (2021)
Jewel Family Fund (2017)
Jochkan Charitable Fund (2002)
Julia and Peter Johannsen Charitable Fund (2016)
Jonas Family Fund (2000)
Samuel Lamar Jordan Trust Fund (2001)
The Joy Fund (2017)
Jumping Rock Fund (2001)
Louis and Marcia Kamentsky Donor Advised Fund (2010)
Albert J. & Diane E. Kaneb Family Fund II (1997)
Beton M. Kaneb Fund (1984)

Louis Kang Charitable Gift Fund (2021)

Martin & Wendy Kaplan Fund (2007)
Kaplan-Barletta Family Fund (2018)
Kassler Family Fund (2000)
Kaufer Family Charitable Giving Fund (2005)
Kaye Charitable Fund (2004)
John & Anne-Marie Keane Foundation Fund (1998)
Keewaydin Fund (2002)
Sabina F. Kelly Catholic Charitable Fund (1992)
Kensington Capital Children's Fund (2002)
Keogh Family Fund (2001)
The Kidder Conservation/Rescue Fund (2005)
Kidder Smith Fund (2003)
M. R. Kidder Charitable Fund (2005)
The Caren and Tom Kilgore Charitable Trust (2016)
Kindling Fund (2012)
Bert King Fund (2016)
John Thomas Kittredge and Charles R. Morehead Fund (2011)
KJN Family Fund (1998)
Kluchman Family Fund (1997)
Allen and Elizabeth Kluchman Fund (1997)
Klureza Family Fund (1997)
Knox Family Fund (2018)
Pamela Kohlberg Fund (1995)
The Margot Elizabeth Koslosky Memorial Fund (2020)
Stephen P. Koster Fund (1986)
Ronni Sachs Kotler Family Fund (2007)
Roger and Lisa Krakoff Foundation (2018)
Kravitz Family Fund (1994)
The Kritzman-Gorman Charitable Fund (2020)
Krivickas Family Fund (2007)
Paul and Mimi La Camera Charitable Fund (2018)
Gregory and Deborah Laham Family Charitable Fund (2011)
Lisa and William Lahey Fund (2017)
Jay R. and Carol B. LaMarche Family Charitable Trust (2013)
LandsEnd Charitable Fund (2018)
Lash Family Charitable Fund (2014)
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2006)
The J. & S. Lawrence Family Fund (2018)
Leading By Example Fund (2015)
Paul and Mary Lee Fund (2014)
Roger & Clarissa Lee Family Fund (2010)
Thomas E. & Barbara B. Leggat Fund (1987)
Jo-Ann and Martin Leinwand Fund (1987)
Edward J. LeMay Fund (2019)

Lisa Harbury Lerner Memorial Fund for Flora, Fauna and Mental Health (2021)

Colman & Carol Levin Fund II (2017)
The Karen and Howard Levine Family Fund (2004)
Levitt Family Fund (2001)
Light-Curtin Fund (2017)
The Shannon Liss-Riordan Family Fund (2020)
John S. Llewellyn, Jr. Community Assistance Fund (1997)
Marjorie L. and James M. Lober Fund (2010)
LOC Fund (2009)
Joan Locatelli Foley Memorial Fund D (1997)
GC & JW Lodge Fund (2001)
LogMeIn Charitable Fund (2019)
Longfield Family Foundation (2012)
Loomis Sayles Charitable Fund (2008)
Lord-Buck Fund (1996)
Bruce Lunder Fund (1983)
John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
Donald J. & S. Kelley MacDonald Charitable Fund (1999)
Magic Penny Fund (1998)
Mahoney Family Fund (1984)
The Zachary Mandel Memorial Fund (2021)
Mann Family Fund (2011)
William G. Markos Fund (1983)
Evelyn A. Marran Fund (1984)
Marston Family Fund (2019)
Martin Fund (1998)
Kumi & Bill Martin Foundation (2019)
MasksOn.org Fund (2020)
Mason-Brown Fund (2008)
Massachusetts COVID-19 Relief Group Donor Advised Fund (2020)
Massachusetts Family Child Care Emergency Fund (2020)
Match School Scholarship Fund (2008)
Joan S. Mathews Charitable Fund (2015)
Karen Mauney-Brodek Fund (2019)
Eric and Sue May Charitable Fund (2012)
May-McClain Charitable Gift Fund (2012)
Mayel Fund (1982)
Austin and Tiverton McClintock Gift Fund (2014)
Alice L. McDougall Donor Advised Fund (2015)
Richard & Judith McGinnis Fund (2000)
McNeill Family Foundation (1998)
McNulty-Weiss Fund (2020)
McSweeney Family Charitable Fund (2010)
Medical Research Fund (1993)
Emily & Bernard H. Mehlman Fund (2003)
Anmol Mehra Fund (2020)

Melendez & Beauchamp Family Fund (2018)
Mellowes Fund (1998)
Thomas M. Menino Fund for Boston (2014)
Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1999)
Meyer Foundation (2007)
Allan Meyers Fund (2001)
Michon Family Fund (1987)
Mid-Century Fund (2005)
Milford Street Fund (2015)
Mill River Foundation Fund (2004)
Gabrielle J. Miller Donor Advised Fund (2005)
The Mills Family Charitable Fund (2017)
Mimecast Charitable Fund (2018)
Anita L. Mishler Education Fund (1984)
The Mission Fund (2019)
Moccasin Brook Fund (2000)
The Modi Family Pass The Luck Foundation (2012)
Molino Family Fund (2004)
Monadnock Fund (2002)
Deborah and Timothy Moore Family Foundation (2021)
Mormann Family Fund (2007)
Andy Morris and Lynne Salkin Morris Family Fund (2012)
Robert S. Morris Advised Fund (2001)
Sykes Moyer Fund (2005)
Muddy Pond Trust Fund (1994)
Munger Family Fund (2002)
Bob & Alison Murchison Fund (2014)
Murphy Family Fund (2014)
The Murray Family Fund (2017)
Musicus (2018)
Mussafer Family Fund (2014)
Myrtle Field Fund (2005)
Mystic Harmony Fund (2001)
Mystic River Watershed Environmental Fund (2012)
Paul and Kathleen Nagle Family Fund (2007)
Leslie & Sandra Nanberg Charitable Foundation Fund (2002)
NEID Climate Change Giving Circle Fund (2018)
NEID Giving Circle (2017)
New Beginnings/Kidder Fund (2005)
New Place (2018)
Next Door Fund (2006)
Nichols Foundation (2017)
Nichols Foundation West (2017)
Joan Nichols Family Fund (2017)
Michael J. Nichols Charitable Fund (2020)
The Nichols Philanthropy Fund (2017)
William H. Nichols Fund (2017)
North Conway Institute Fund (2001)

Chad & Lia Novotny Fund (2002)
 Kathryn Novotny Fund (2007)
 Nicholas Novotny Fund (2007)
 Novotny/Ramirez Donor Advised Fund (2002)
 Novotny/Swahnberg Fund (1998)
 O'Brien Family Fund (2007)
 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)
 Orpheus Fund (2003)
 E. Ostroff Fund for Service (2017)
 Owen Marie Fund (2013)
Louise Burnham Packard Charitable Fund (2021)
 Palmer Family Fund (2016)
 Morgan Palmer Foundation (1982)
 John J. Pappenheimer Fund (1995)
 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)

Perkins Improvements Fund - William (1996)
 John A. Perkins, Jr. Fund (2001)
 Robert C. Perkins Fund (2001)
 Samuel Perkins and Nancy Reed Fund (1996)
 Sheila and Sara Perkins Fund (1996)
 Peter Fund (2001)
 Petersen Family Fund (2002)
 Philancon Fund (1990)
 Katherine A. & Fannie Phillips Fund (1997)
 Picard Family Fund (2000)
Michelle Picotte Foundation (2021)
 Jamie Pierce & Rick Cresswell Fund (2003)
 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)
 Otto W. Ramstad Fund (1999)
 Phyllis and Jerome Lyle Rappaport Fund (2016)
 The Tuukka Rask Foundation (2014)
 Bessye Bedrick Ravelson Fund (2003)
 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)
 Robynhood Thanksgiving Fund (2003)
 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)

D O N O R A D V I S E D F U N D

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)
 Charles S. and Zena A. Scimeca Charitable Fund (2004)
 September Fund (2001)
 A Servant's Heart (2014)
 Shapiro/Fleishman Fund (2000)
 Douglas Boyd Sharpe Donor Advised Fund (2007)
 Shawkemo Fund (2001)
 SheGives Fund (2015)
 Bob and Jean Sheridan Family Fund (2013)
 Sherman Family Foundation Fund (2005)
 Jon Shevell Cancer Fund (2011)
 Jon Shevell Children's Fund (2011)
 Jon Shevell Education Fund (2011)
 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)
 Ellen L. Simons Fund (1998)
 Sixty-Nine Roses Charitable Foundation (2011)
 Skylight Fund (2000)
 Fay Slover Fund (2011)
 Ellin Smalley Fund (1988)
 Austin & Susan Smith Fund (2000)
 Clark R. and Trina H. Smith Family Fund (1991)
 Anna and Jack Sommers Family Gift Fund (2018)
 Sparky Foundation Fund (2004)
 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)
 Elihu and Lillian Stone Family Charitable Fund (2003)
 James M. and Cathleen D. Stone Family Foundation (1996)
 Congressman Gerry E. Studds Fund (2007)
 Charles Sugnet Fund (1999)
 Joshua Sugnet Fund (1999)
 Suhrbier Family Fund (2006)
 Nancy L. Sullivan Fund (1990)
 Diane Sullivan-Villano Fund (1998)
 Sunrise Fund (1993)
 Sustainable Strategies 2050 Impact Fund (2020)
 Sylvan Fund (1986)
 TAF Device (2019)
 TechFoundation Fund (2003)
 Tempero Family Fund (2003)
 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)
 Tusk Montgomery Charitable Giving Fund (2018)
 Upper Mill Fund (2019)
 Sarah Valentini Foundation (2020)
 Joseph Bishop Van Sciver Fund (1861-1943) (1998)
 Marlyn and Richard Victor Fund (2017)
 Violet Iris Fund (2015)
 Ann & Robert von der Lippe Fund (1998)
 James and Margaret Wade Fund (1997)
 JH & EV Wade Fund (1991)
 Linda M. Walczak Children's Literacy Fund (2016)
 Waldron Charitable Fund (2018)
 Walker Fund (1999)
 The Walter/Capone Fund (2011)
 Ruth and Henry Walter Fund I, II & III (2011)
 J. H. Walton Family Fund (1987)
 Mitchell and Barbara Freedman Wand Charitable Fund (2014)
 Warner Charitable Gift Fund (2000)
 Anita Barker Weeks Charitable Gift Fund (2012)
 Gordon Weil, Jr. Fund (2010)
 Weiss Charitable Fund (2005)
Weitzman-Bugbee Family Fund (2021)
 Wellesley Hills Congregational Church Outreach Fund (2007)
 Janet White Memorial Scholarship Fund (2004)
 Whitehead - Sayare Fund (2008)
 Guy and Maggie Wickwire Fund (1990)
 James and Debra Wiess Fund (2013)
 Benjamin J. Williams, Jr. Fund (1987)
 Hope A. Williams Fund (1987)
 Natica R. Williams Fund (1987)
 Ralph B. & Margaret C. Williams Fund (1985)
 Ralph B. Williams, II Fund (1987)
 Williamson Charitable Fund (2016)
 The Windy West Fund (2016)
 Winkler Family Foundation Fund (2001)
 Winn Family Charitable Fund (2016)
 Wesley L. Winship Fund (1999)
 Winsor Foundation Fund (1989)
 Jack & Judith Wittenberg Fund (1997)
 Howard L. Wolf Memorial Fund (1981)
 Michael N. Wood Fund (1997)
 Christopher and Debra Wysopal Charitable Trust (2018)
 Leila Yassa & David Mendels Fund (2001)
 YotMe Donor Advised Fund (2018)
 Zabin Charitable Fund (2001)
 Emily Zofnass Fund (1998)
 T. Zouikin Charitable Fund (2004)
 Zug Family Fund (2009)
 Zwanziger Fund (2007)
 The Zwanziger-Hoffman Fund (2018)

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
James M. and Cathleen D. Stone Family Foundation (1995)

SCHOLARSHIP FUNDS

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

The Laura Ahlbeck Memorial Scholarship Fund (2017)
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)
Robert L. Gould Fund (1988)
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)
Nixon Peabody Scholarship Program in Recognition of Retired Managing Partners
Robert S. Cummings, Nestor M. Nicholas, and Harry P. Truheart, III (1998)
Stephen D. Paine Scholarship Fund (1999)
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)

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

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) | Boston Baroque Fund (2004) |
| Ad Club Foundation Fund (1988) | Boston Debate League Endowment Fund (2018) |
| Fund for Adult Literacy (1985) | Boston Medical Center Services Fund (2018) |
| Rae and Aaron Alberts Foundation Fund (2003) | Boston University School of Education Fund (2018) |
| Rae and Aaron Alberts Foundation Fund II (2005) | Richard L. Bowser Fund (1985) |
| Ames, IA Public Library Large Print Endowment Fund (2018) | BPE/Hancock Endowment for Academics, Recreation & Teaching (1985) |
| Frank E. Anderson Fund (1976) | BPE/Support for Early Educational Development Fund (1986) |
| Artists Foundation Endowment Fund (1984) | Herbert Brandshaft Scholarship Fund (2008) |
| Red Auerbach Youth Foundation Fund (1983) | Annie L. Breckenridge Trust Fund (2000) |
| The Helena and Alfred Barthel "Peace on Earth" Endowment (2017) | Brookline Youth Concerts Fund (1995) |
| Lilian G. Bates Fund (1952) | Michael and Stella Buonsanto Charitable Fund (2013) |
| Bedford, MA Public Library Large Print Endowment Fund (2018) | Charles T. Burke Fund for the Watertown Boys and Girls Club (1995) |
| Grace & Floyd Lee Bell Fund (1988) | Charles T. Burke Fund for the Watertown Free Public Library (1995) |
| Lisa and Tom Blumenthal Artistic Innovation Fund (2018) | Agnes T. Carruth Fund (1984) |
| Boston Ballet-E. Virginia Williams Endowment Fund (1984) | James F. Casey Fund (1950) |
| Boston Bar Association Endowment Fund (1984) | Dr. Walter Channing Memorial Fund (1934) |
| | Charles River Parklands Stewardship Fund (2002) |

DESIGNATED FUND DONOR

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.



D E S I G N A T E D F U N D
HAITI DEVELOPMENT INSTITUTE



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.

- Philip P. Chase Fund (1956)
- Julia Child Fund (1980)
- Ellen D. Cholerton Fund (1970)
- Arthur G. Chute and Nordice Chute Family Legacy (2018)
- Ernest & Vera Clivio Charitable Memorial Fund (1982)
- Committee to Light Commonwealth Avenue Fund (2012)
- Concord, MA Public Library Large Print Endowment Fund (2018)
- Almon B. Cook-Relief Fund (2001)
- Allyn Cox Fund for Essex County Greenbelt (1994)
- Thomas G. Curtin - Bobby Kargula Nanae Fund (2010)
- Dedham Choral Society Endowment Fund (1992)
- Harry Ellis Dickson Youth Concerts Fund (1982)
- Joy & George Dryfoos Charitable Fund (2013)
- Duggan Charity Fund (1999)
- East Boston Social Centers, Inc. Fund (1997)
- Douglas A. Eaton Memorial Fund (1963)
- William V. Ellis Fund for Our Lady of Good Voyage Carillon (2012)
- Ruby C. Emerson Fund (1967)
- English High School Class of 1934 Award Fund (1995)
- The English High School-John P. Murphy Scholarship Fund (1996)
- Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2009)
- Philip M. Fagan Family Fund (1972)
- Paul R. & Jacqueline D. Fehrenbach Family Fund (2000)
- Benjamin M. Feinberg Fund (1963)
- Arthur Fiedler Esplanade Concerts Fund (1980)
- Mark Hayden Fineman Chess Tournament Fund (1985)
- Felix Fox Memorial Fund (1975)
- Americo Francisco Fund, Estate & Realty/Charitable Trusts (1999)
- Peter Marshall French Memorial Fund (1977)
- The Linda Friedman Memorial Fund (2017)
- Gaywest Farm Fund (1994)
- Agnes A. Gidley Memorial Fund (2014)
- John & Ethel Goldberg Fund I (1984)
- John & Ethel Goldberg Fund V (1985)
- John & Ethel Goldberg Fund VI (1985)
- Bessie P. Goldsmith Fund (1994)
- Barbara W. & Frank B. Gopen Fund (1979)
- Walter W. Gove Fund (1973)

- Elizabeth Grant Fund (1981)
- Rosario Fajardo Hagan Fund (1991)
- Haiti Development Institute Fund (2016)
- Patricia Jellinek Hallowell Fund (1993)
- Hastings-Plummer Fund (1941)
- Jorge N. Hernandez Fund (1988)
- Gertrude Hooper Fund (1997)
- Madeleine C. Huiginn Fund (1993)
- Blanche Hyslop Fund (1983)
- Orchestra of Indian Hill Music Director Fund (2003)
- James W. & Margaret A. Ingraham Charitable Fund (1992)
- Inversant Fund (2018)

- Ella Jackson Artists and Scholars Fund (1983)
- Leslie Gillette Jackson Fund for the Visual Arts and Poetry (2014)
- Johnson Scholarship Fund (2020)
- Donaldson F. Jones Fund (2000)
- Patrick F. Jones, Jr. Endowment Fund (1982)
- William & Sean Kelley Scholarship Fund (2010)
- John F. Kennedy Library Foundation Endowment Fund (1984)
- Demetra Kenneth-Brown Fund (1921)
- Alice V. Kidder Fund (2001)
- Robert D. and Sally G. King Fund (2000)
- La Vida (2018)

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

Lawrence B. Lewis Fund (1958)

Lexington Arts & Crafts Endowment Fund (2018)

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

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

Lionheart Foundation Endowment Fund (2018)

Ralph Lowell Fund (1983)

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

John S. McCann Fund (2000)

MHEAC Fund for ACCESS (1987)

Dorothy Morse Endowment Fund (2000)

Harry D. Neary Fund (1951)

Neighborhood Preservation Initiative Fund (1995)

New England Aquarium Education Fund (1984)

New England Forestry Foundation Fund (1997)

New England Women's Club Fund (2002)

Roger L. Nichols Internship Program Fund (1985)

William H. Nichols Fund For Chemistry (2017)

Lottie S. Page Fund (1985)

Robert Treat Paine Historical Trust Fund (1991)

Palazzo San Gervasio Library Fund (1995)

William Morgan Palmer Fund (1978)

Harold Peabody Memorial Fund (1993)

Permanent Fund for Vocational Education (1979)

John M. Pero Scholarship Fund (2015)

Charles & Cornelia Pfaff Fund (1965)

Henry L. Pierce Fund (1959)

Emma K. & Richard Pigeon Fund (1956)

The Plimpton-Poorvu Design Prize Fund (2015)

Pozen Prize for Innovative Schools (2014)

Primary Care Fellowship Program Fund (1983)

Public School Management Research Fund (2003)

Pylone Chantha Orphanage Project (2020)

Quincy High School Class of 1973 Memorial Scholarship Fund (2021)

Charlotte F. & Irving W. Rabb Family Fund (1985)

Reading Visiting Nurse Association Fund (1977)

Rockport Music Fund (2018)

Rogers Fund of the Riverside Cemetery (1998)

Henry A. Root Fund (1927)

Rose Fund (1982)

Dr. Jordan S. Ruboy Charitable Fund (2014)

Sheep Pasture Fund (1994)

Bessie H. Short Fund (1997)

Dana P. & Maude E. Simpson Memorial Fund (1999)

Muriel & Otto Snowden Endowment Fund (1985)

Social Law Library Endowment Fund (1982)

Michael Spock Community Service Fund (1981)

Alison L. Stevens Fund (1977)

Eva and William Stillman Scholarship Fund (2014)

Miriam & Sidney Stoneman Fund (1984)

Surfmen's Trust Fund (1978)

Agnes & Lewis Taylor Fund (1963)

Frank B. Thayer Fund (1977)

Pauline Toumpouras Fund (2010)

Tsuda College Fund (2018)

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

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

United Way Millennium Fund for Children and Families (2000)

Ansin Fund (2003)

Connell Family Fund (2001)

Carol R. & Avram J. Goldberg Fund (2002)

Lawrence & Beth Greenberg Fund (2001)

Darlene & Jerry Jordan Fund for Children (2000)

The Kraft Family Fund (2001)

Margarete McNeice Fund (2001)

David R. and Muriel K. Pokross Fund (2004)

Schoen Family Fund (2000)

Tom & Nancy Shepherd Fund (2001)

State Street Foundation Fund (2001)

J.C. Tempel Fund for Children (2001)

Vinik Family Fund (2001)

Peter and Pamela Voss Fund (2001)

Robert E. Wallace Memorial Fund of the Urban League (1992)

Inez Washabaugh Ward, PNP, Scholarship Fund (2011)

Bradford Washburn Fund (1980)

Bill and Estelle Watters Fund (1997)

Jane Wengren Fund (1980)

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)

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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

PLEDGE
1%
BOSTON

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



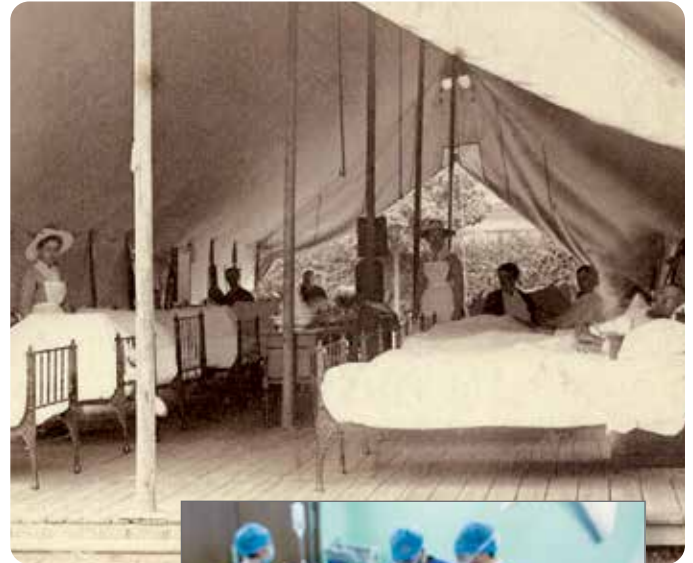
private foundations, families, individuals and corporations here and around the globe.

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

JOB & 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.

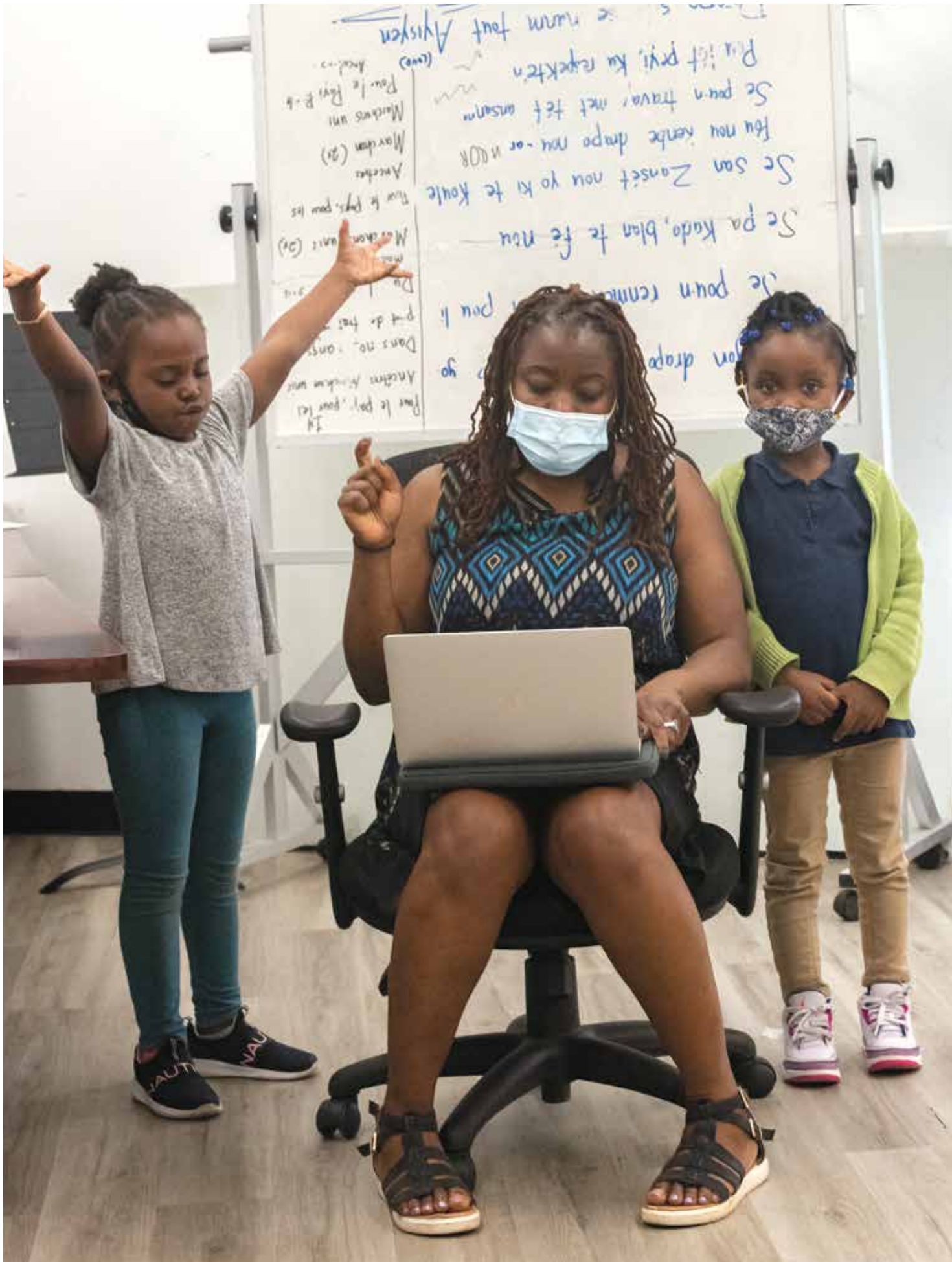
In addition, discretionary grantmaking supports programs within our Social Justice Ecology framework. Through this work, our goal is to help inform and strengthen the conditions that allow social justice to thrive in Greater Boston by providing access to resources and support for people, movements and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





2021 Financials

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

FUND FOR THE 21ST CENTURY

The Boston Foundation offers 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)

	1 YEAR	3 YEARS	5 YEARS	10 YEARS	15 YEARS	20 YEARS
Fund for 21st Century Investment Options:						
Balanced Plus Pool	35.3%	12.6%	11.8%	8.5%	7.1%	6.9%
Balanced Pool (established 2/1/11)	22.9%	9.1%	8.9%	6.6%	n/a	n/a
Impact Pool (established 6/1/20)	29.5%	n/a	n/a	n/a	n/a	n/a
Short-Term Pool (established 1/1/10)	0.09%	1.4%	1.2%	0.6%	n/a	n/a
Benchmarks:						
FTSE World Bond Index	0.8%	3.6%	1.7%	1.4%	3.4%	4.6%
65% MSCI A.C. World/35% FTSE World Bond Index	24.7%	11.0%	10.2%	7.1%	6.4%	6.7%
MSCI All Country World Stock Index	39.3%	14.6%	14.6%	9.9%	7.6%	7.3%
S & P 500 Stock Index	40.8%	18.7%	17.6%	14.8%	10.7%	8.6%

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.

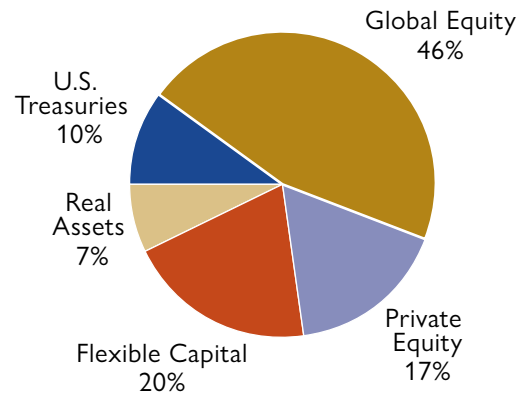
FINANCIAL STATEMENTS

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.

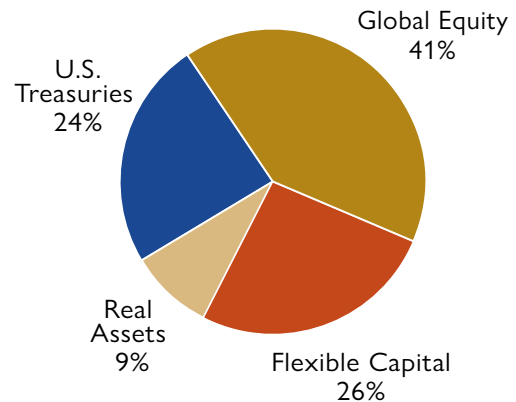
A summary of the financial statements is shown on the following page. The statements and Form 990 are available on our website at www.tbf.org.

ASSET ALLOCATION

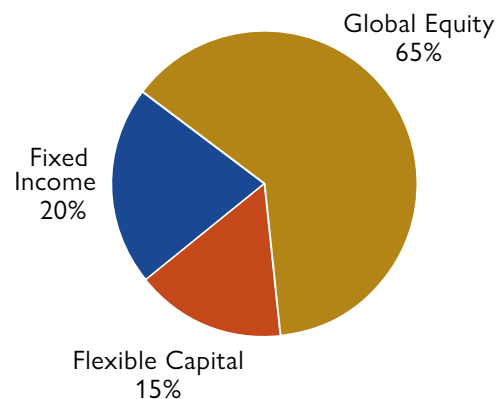
Balanced Plus Pool



Balanced Pool



Impact Pool



2021 AND 2020 SUMMARY FINANCIAL STATEMENTS

(in thousands)

ASSETS:	2021	2020
Investments	\$ 1,645,019	\$ 1,156,978
Cash & Equivalents	12,561	13,504
U.S. Treasury Notes	25,598	27,127
Receivables & Other	26,506	24,921
Total Assets	\$ 1,709,684	\$ 1,222,530
LIABILITIES & NET ASSETS:		
Accounts Payable & Other Liabilities	\$ 8,135	\$ 7,765
Grants Payable	5,056	1,418
Net Assets	1,696,493	1,213,347
Total Liabilities & Net Assets	\$ 1,709,684	\$ 1,222,530
REVENUES:		
Contributions	\$ 308,694	\$ 168,641
Service Fee Income	2,240	1,998
Net Investment Return	370,563	1,671
Total Revenues	681,497	172,310
GRANTS & EXPENSES:		
Grants	\$ 174,222	\$ 215,240
Change in Split Interest Trusts	(363)	499
Operating Expenses	24,492	25,978
Total Grants & Expenses	198,351	241,717
Change in Net Assets	483,146	(69,407)
Net Assets Beginning of Year	1,213,347	1,282,754
Net Assets End of Year	\$ 1,696,493	\$ 1,213,347

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

Board of Directors

The Boston Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community's interests and needs.

All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.

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