

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

Some Of Them Are All Three.

They Look At Problems And
See Nothing But Opportunities.

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

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

They Are The Change Makers.

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

Jack Kerouac

Novelist and poet born in 1922 in Lowell, Massachusetts



Nonnie and Rick Burns

Read about how they are changing the very definition of “family philanthropy” on page 12

Elaine Ng

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



Dawdu Mahama-Amantanah and Gerald Chertavian

Learn how they are changing the ways we can close the opportunity divide on page 16



Dr. Barry Zuckerman (front) with Drs. Dan Parry and Natalie Stavas

See page 18 to learn how they are changing the focus from “health care” to “health” for our state’s children



Eos Foundation's Kate Deyst

Read about how one foundation wants to change the odds for hungry children in Massachusetts on page 20



Dr. Roger Harris

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



(From left) Bill Nigreen, Bill Speciale, Grace Fey and Jon Steffensen

Learn how they want to change our city’s future by building the Permanent Fund for Boston on page 24

Introduction

We at the Boston Foundation are extremely fortunate to know hundreds of remarkable “change makers.” From our donors and grantees to civic and grassroots leaders, we are honored to work side-by-side with those who are writing the script for Greater Boston’s future.

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

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

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

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

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

Michael B. Keating, Esq.
Chair, Board of Directors

Paul S. Grogan
President & CEO

The Change Makers

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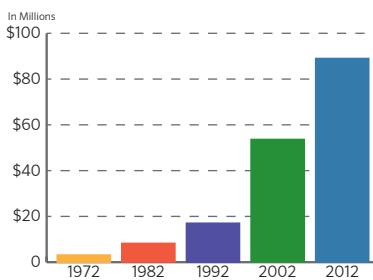
45 Special Initiative Funds

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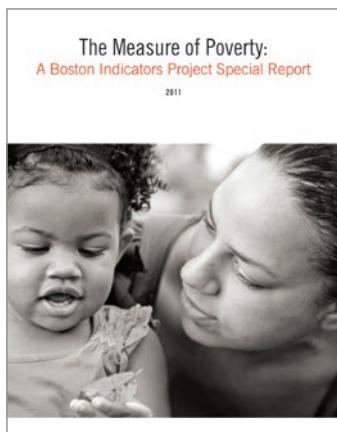
50 Donor Advised Funds

55 Support Organizations and Other Special Funds

2012 at the Boston Foundation



Record-breaking grants from the Foundation and its donors **total \$88 million**—some \$34 million more than a decade ago.



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



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INNOVATION, INFORMATION, IMPACT

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



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

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



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

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

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



The Foundation **leverages \$26 Million in Funds** through special initiatives, collaboratives and co-funding from our donors.



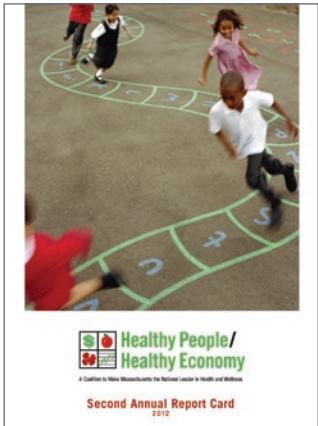
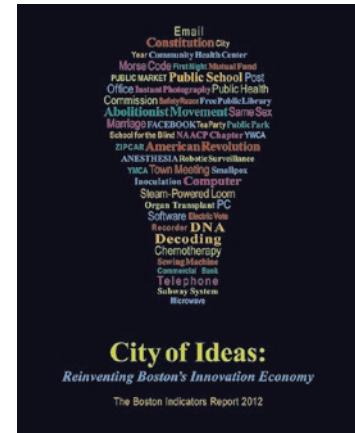
The Giving Common

An Initiative of the Boston Foundation
givingcommon.org

The Giving Common is launched and more than **500 Massachusetts nonprofits** participate in the **Giving Common Challenge, raising** more than **\$1 million**.

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

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



The Healthy People/Healthy Economy Coalition

releases its second report card, showing some progress, but much room for improvement.

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

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



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



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

My Summer in the City makes more than **\$500,000 in grants** to keep parks open and provide more than **400 summer jobs** to inner-city youth.



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The Boston Foundation is overseen by a distinguished Board of Directors, selected to represent the broad diversity of our community's interests and needs. All grants from the Foundation are approved by the Board, which also sets policy and guides the Foundation as it fulfills its mission.



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About the Boston Foundation

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

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

Giving

Enhancing the Philanthropic Impact of Our Donors



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

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

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

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

Supporting Nonprofits

Strengthening the Effectiveness of the Entire Sector

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

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

- ▲ Building the effectiveness of organizations and leaders through the **Vision Fund** and the **Institute for Nonprofit Management and Leadership** at Boston University
- ▲ Encouraging collaboration through the **Catalyst Fund for Nonprofits** and **Collaborate Boston**
- ▲ Strengthening the entire sector through **research** and **advocacy**



Having an Impact

Civic Leadership That is Working

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



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

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

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

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

Three screenshots of the Boston Foundation's websites. The top screenshot shows the homepage of "The Giving Common" (givingcommon.org), featuring a photo of a smiling child and a search bar. The middle screenshot shows the homepage of "The Boston Indicators Project" (bostonindicators.org), featuring a photo of people running and a navigation menu. The bottom screenshot shows the homepage of the main Boston Foundation website (bf.org), featuring a photo of a man and a woman and various program links like "What Will You Be Doing in 100 Years?" and "The Giving Common Challenge".



Visit Our New Websites

For an in-depth look at all of our work, please visit the Boston Foundation's new website at **tbf.org**. We also invite you to visit **bostonindicators.org**, which offers unprecedented information and analysis about the greatest opportunities and challenges our city and region face. And go to **givingcommon.org**, your place for informed giving in Massachusetts.

“The future
does not belong to
those who are content
with today.”

Robert F. Kennedy

The Change Makers.

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

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

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

Finally, you will learn about a group of dedicated donors and advisors who are helping the Boston Foundation strengthen the Permanent Fund for Boston, Greater Boston’s endowment fund. That irreplaceable resource has had an impact on all of the people profiled in these pages and countless others. We thank this determined group and we invite you to consider joining us, so that together we can be there to support the change makers of tomorrow.





Contributing Dollars, Time and Leadership

Butler's Hole is a magical spot where Nantucket Sound meets the Atlantic Ocean. It holds a special place in the hearts of the Burnes family and so when Nonnie and Rick Burnes decided to open a Donor Advised Fund at the Boston Foundation in 1994, they called it the Butler's Hole Fund.

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

"I think donors should take responsibility for making sure that the dollars they invest are effectively spent," explains Rick. "One way to do that is to serve on the boards of nonprofits." With a passion for the importance of teaching technology, he has chaired the board of Boston's Museum of Science and served on the Boston Foundation's board. Nonnie currently chairs the board of Planned Parenthood of Massachusetts at a time when that organization's work is more important than ever.

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

All three of their adult children also have their own Donor Advised Funds at the Foundation, all with the words "Butler's Hole" in the fund names. "They represent the next generation of philanthropists," says Nonnie, "and we're proud of the thoughtful way they are taking on that role."

The Burnes Family has four Donor Advised Funds at the Boston Foundation—and Nonnie and Rick Burnes (center) plan to leave a major bequest to the Permanent Fund for Boston.





Boston Chinatown Neighborhood Center has received operating support from the Boston Foundation to help build an even more vibrant neighborhood right in the middle of downtown Boston.

Collaborating for Chinatown's Future

Elaine Ng calls her beginnings a "common Chinese immigrant story." Her father came to Boston from China at the age of 16 and was a restaurant worker before he learned English, joined the Army and eventually found a calling in civil rights work. When he had established himself, he traveled to Hong Kong and returned with his wife, who was just 17 and pregnant with Elaine. Her mother became a garment worker and the family lived in Chinatown until Elaine was nine years old, then moved to Roslindale because her mother was concerned about gang activity in Chinatown.

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

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

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

She is also excited to be collaborating with the other leaders in the neighborhood to launch a cultural center and a library. "Organizations in Chinatown have come together," she says, "to create something that will bring a new sense of vibrancy to this community for years to come."

Closing the Opportunity Divide

At a State House rally on April 5th of this year, Dawdu Mahama-Amantanah stood before a crowd of people who were there to support the Coalition FOR Community Colleges—a group made up of more than 60 organizations from across Massachusetts intent

on strengthening the state's community college system. He spoke about what he called "the transfer wars," wherein the credits he earned at a community college were worthless at another state college. He also described the quality of the education he received.

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

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

Year Up is a member of the Coalition FOR Community Colleges, which was convened by the Boston Foundation early this year and led to sweeping changes in the state's community college system that were signed into law by Governor Deval

Gerald Chertavian, Year Up's Founder and CEO, and Dawdu Mahama-Amantanah, a Year Up graduate, want to create more pathways to opportunity for young adults, in part by strengthening the Massachusetts community college system.

Patrick in July. The changes are designed to align community colleges with the workforce needs of the state. Massachusetts has a "skills gap" that has left some 100,000 positions unfilled when hundreds of thousands of people are unemployed, but unqualified for the open jobs.

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

"I would have taken advantage of an opportunity like that," says Dawdu. "I constantly think about everyone who hasn't had the opportunities I've had through Year Up." He adds, "I consider myself part of a movement to make America see the potential in all young people."





Fighting for Children's Health

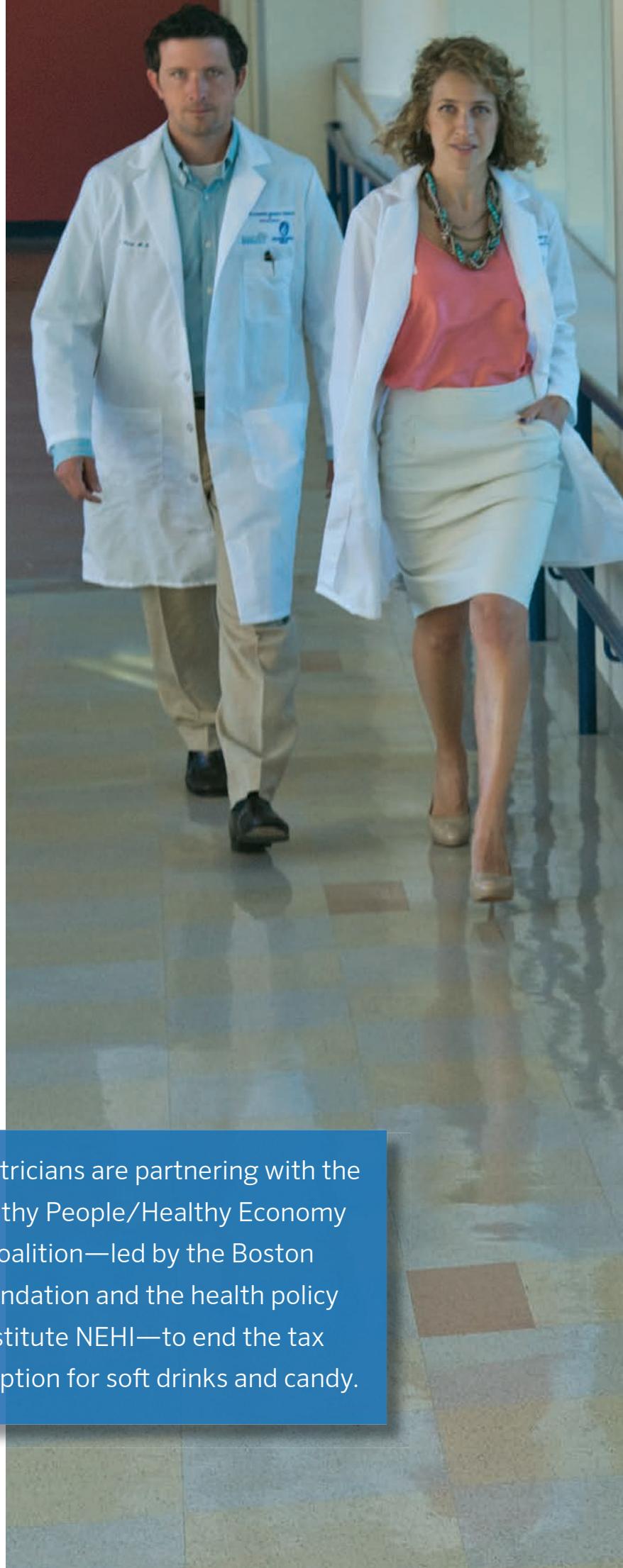
Dr. Barry Zuckerman, Chief of Pediatrics at Boston Medical Center (front), is nationally known for his lifelong, fierce advocacy on behalf of children's health. Today, he is taking on what he considers to be the number one risk to children's health: obesity and the sugar-sweetened beverages and juices that are the largest source of excess calories in children's diets. There is a strong association between obesity and the increase in Type 2 diabetes and other chronic illnesses.

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

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

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

"I have found parents very receptive to these 'prescriptions,'" explains Dr. Parry. "They know sodas aren't healthy and they need a doctor's reinforcement to convince their children." Dr. Stavas adds, "Instead of prescriptions for illness, we think of them as prescriptions for health."



Pediatricians are partnering with the Healthy People/Healthy Economy Coalition—led by the Boston Foundation and the health policy institute NEHI—to end the tax exemption for soft drinks and candy.



Eugene Zelcer
Department of Pediatrics
Children's

BOSTON MEDICAL CENTER

Embracing Strategic Philanthropy

The Philanthropic Initiative (TPI) merged with the Boston Foundation this year, bringing with it nearly 25 years of experience in philanthropic advising to individuals, families, foundations and corporations in Boston, across the country and around the world. Two local philanthropists who have benefited from TPI's expertise are Ken Nickerson and Kate Deyst, a married couple who are the donors behind Eos Foundation.

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

Kate Deyst, one of the founders of Eos Foundation, is working with the foundation's staff on a large investment in nutritious food access—an effort they hope will have a profound effect on child hunger in Massachusetts.

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

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

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

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

Over the next several years Eos will take on childhood hunger by investing at least \$15 million in access to nutritious food—an effort they both hope will make a measurable difference. Ken says that while they are interested in outcomes and data and "a nuanced understanding" of what works and what doesn't, there is another impulse he and Kate follow. "Ultimately," he suggests, "philanthropy means a love of others. What tugs at you? What inspires you? Those are the most important questions we ask ourselves."







Educating for a Global Future

Anyone in our society who has experienced success can usually trace their success to an individual, or an institution, that inspired them to dream and work hard to develop skills to accomplish their dreams. The Boston Renaissance Charter Public School is that kind of institution."

This quote, from the Renaissance School's Superintendent and CEO, Dr. Roger Harris, is stenciled on a glass

partition on the second floor of this remarkable school—in a spot where the sun shines through it, amplifying its message.

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

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

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

He is particularly proud that all students learn to understand and respect Chinese culture, speak and write Mandarin, read and write music—and play the piano. "We live

Roger Harris was a halfback at Boston University, a Marine in Vietnam and a teacher in the Boston Public Schools during desegregation. Now he is waging—and winning—the most spirited fight of his life.

in an ever-shrinking, multicultural world," he explains. "We need to prepare students for a global economy where respect, tolerance and the ability to work cooperatively with people of diverse backgrounds will become a priority."

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

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



Building Boston's Permanent Fund

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

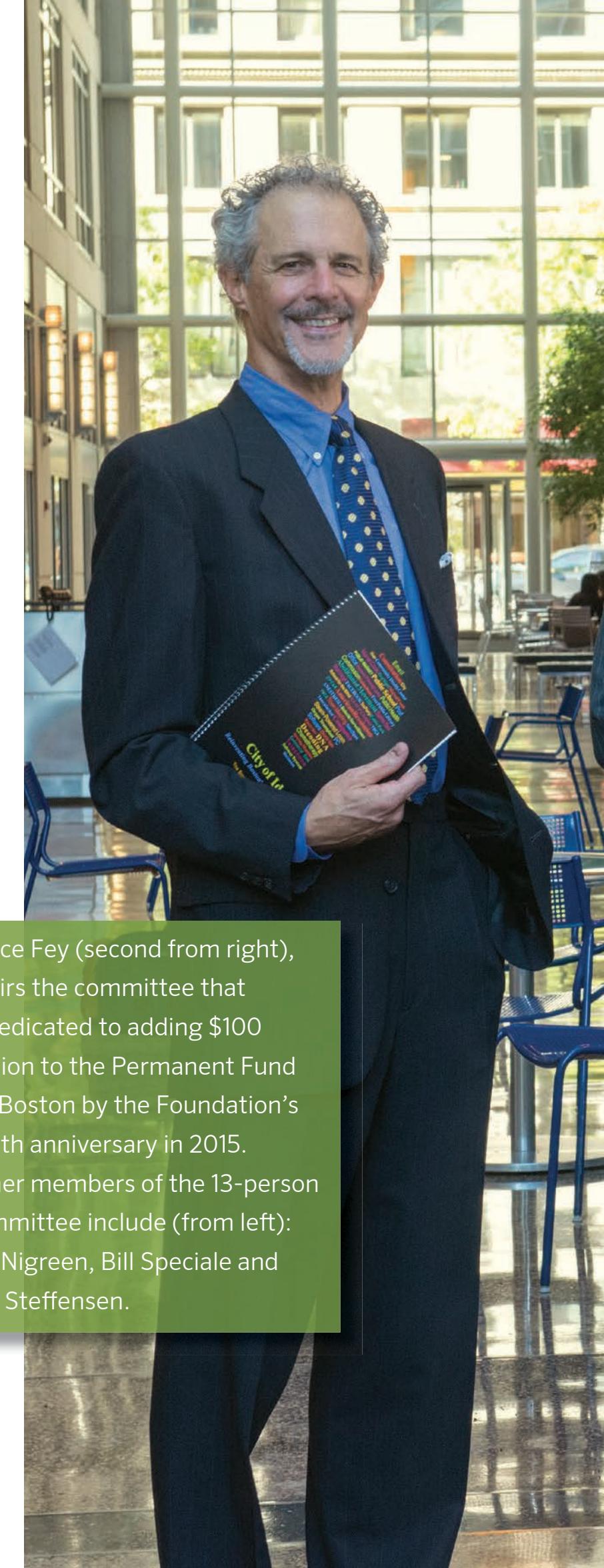
But in 1917, a remarkable thing happened: A civic-minded Boston businessman named James Longley left a bequest of \$4 million to the Boston Foundation. It was a staggering sum for the time and it catapulted Greater Boston's community foundation to the position of being the first in the country to make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

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

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

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

"Inspired by that first gift in 1917, the Boston Foundation is asking a provocative question of people who care deeply about our community: 'What Will You Be Doing in 100 Years?' It really makes you think about your legacy. Imagine what Mr. Longley has done for Greater Boston over the last 100 years. Imagine what he's doing today!"



Grace Fey (second from right), chairs the committee that is dedicated to adding \$100 million to the Permanent Fund for Boston by the Foundation's 100th anniversary in 2015. Other members of the 13-person committee include (from left): Bill Nigreen, Bill Speciale and Jon Steffensen.



Thriving People. Vibrant Places.

The work of the Boston Foundation is guided by two expansive goals that reflect our deep commitment to strengthening the Greater Boston community through grantmaking, civic leadership and enhancing donor impact:

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



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

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

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

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

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

Strategy: Accelerate structural reform and promote autonomies in public schools in Boston

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

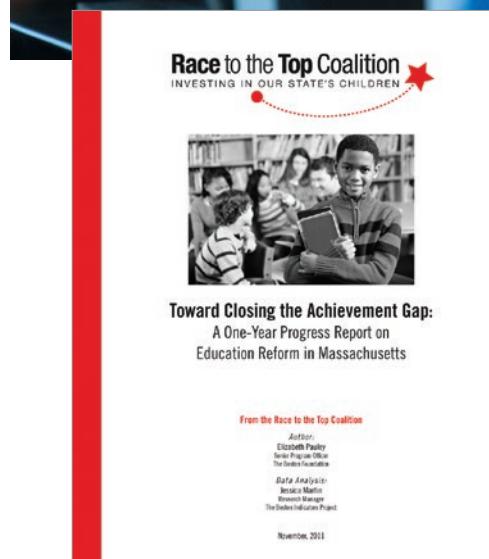
Recent grants in this area include \$183,000 to the **Boston Plan for Excellence** to support the **Dudley Street Neighborhood Charter School**. Among multi-year grants are \$300,000 over three years to **Unlocking Potential** to support its operation of low-performing schools in Boston using the in-district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

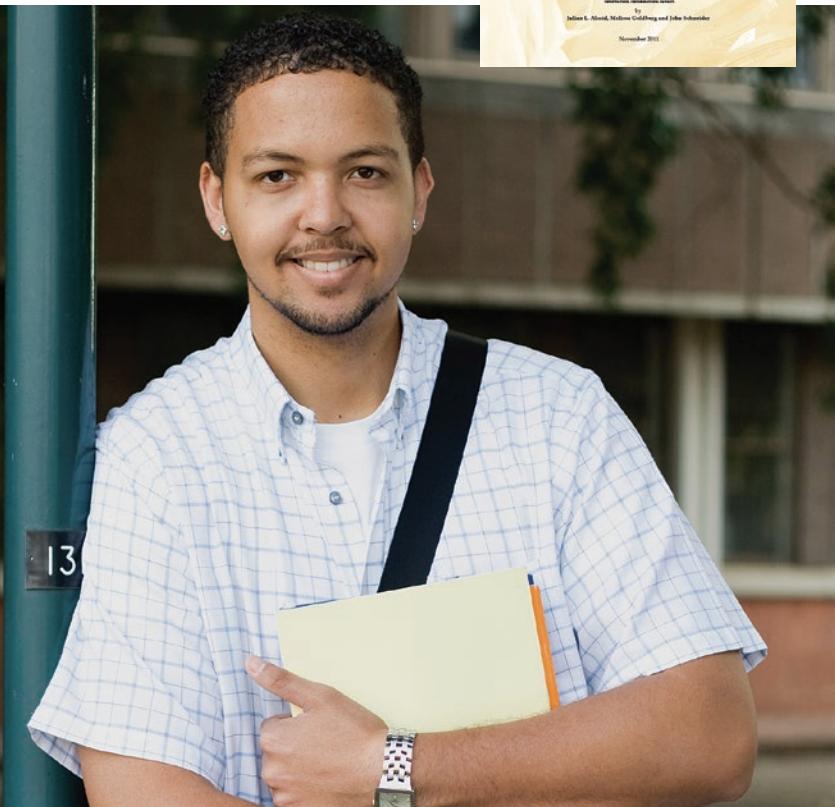
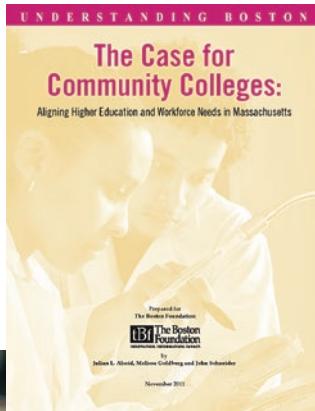
The **Race to the Top Coalition**, a consortium of Massachusetts business, civic and community leaders convened by the Boston Foundation, released its first progress report since playing a major part in passing statewide education reform. The report shows positive results for turnaround schools and charter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

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

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

Our major investment is \$1 million a year to the **Success Boston College Completion Initiative**, which is supported by 38 colleges and universities and numerous other public and private partners. Additional grants include \$125,000 for the Commonwealth's **Vision Project**, to measure success rates at public higher education institutions.





Strategy: Promote the career advancement and economic security of low-income individuals

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

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

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

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

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

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

The **Healthy People/Healthy Economy Coalition**, convened by the Boston Foundation and NEHI and dedicated to making Massachusetts the national leader in health and wellness, released its **Second Annual Report Card** and filed legislation to end the state sales tax exemption on soft drinks and candy and to restore physical activities to the state's schools.



Strategy: Grow local businesses and increase job growth and access for low-income residents

To **strengthen economic competitiveness** in

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

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

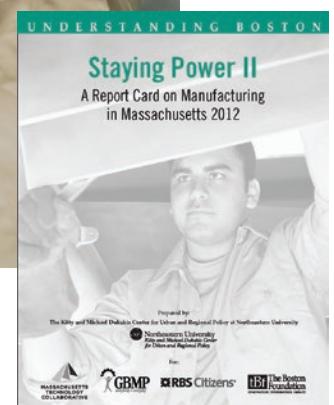
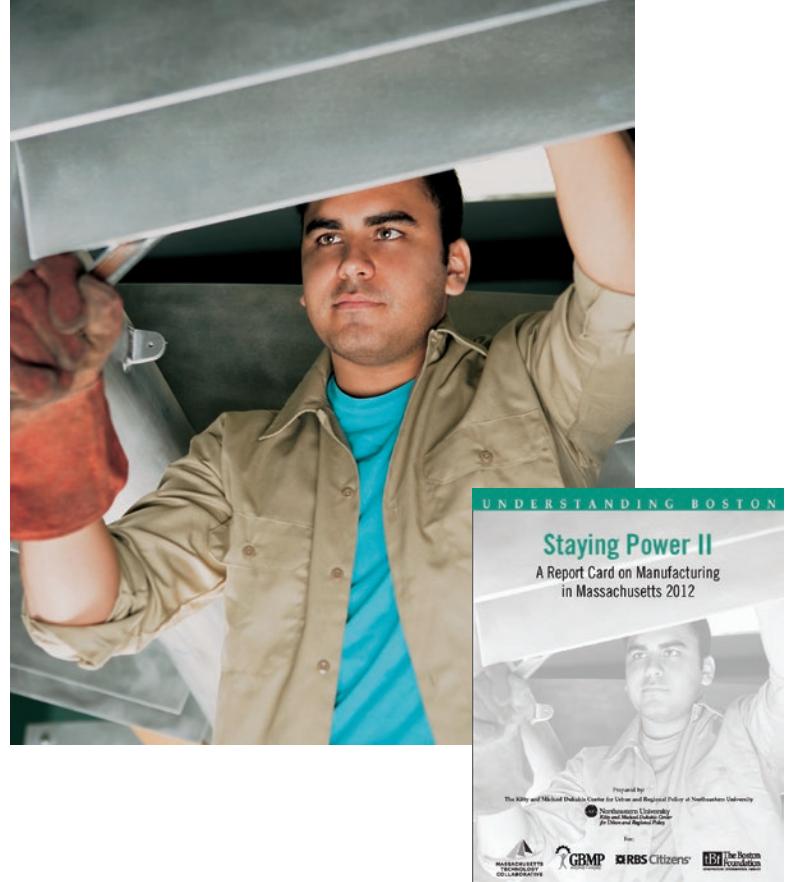
This year, the Boston Foundation, in collaboration with the Massachusetts Technology Collaborative, the Greater Boston Manufacturing Partnership and RBS Citizens, published **Staying Power II**, a report on manufacturing in Massachusetts, showing that this sector is still going strong and highlighting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

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

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

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

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





Strategy: Increase neighborhood stability and the production and preservation of affordable housing

By 2015, the Foundation seeks to help **preserve 6,500 affordable housing units** and **produce 6,500** additional units, while **saving 600** units from foreclosure.

The Foundation is supporting the groundbreaking **Fairmount/Indigo CDC Collaborative** with a grant of \$1 million over five years for community development along that transit line. Other multiyear grants include \$700,000 over three years to **Local Initiatives Support Coalition** (LISC) to leverage national funding for housing and community development.

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



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

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

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

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



Applying for a Grant

A Focus on People and Place

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

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

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

Goals: Greater Boston residents are successful and thriving

Greater Boston communities are vibrant, safe and affordable

Objectives:

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

Types of Support

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

Competitive Grants: At any point in time, there are 150 to 175 organizations in the Foundation's competitive

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

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

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

We invite you to visit our website for detailed information about how to reach us and how apply for a grant. Please go to www.tbf.org and choose "Investing in Nonprofits."

Becoming a **Donor**

Customizing Charitable Solutions One Donor at a Time

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

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

Expertise and Service That Can Maximize Your Giving

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

Choosing the Contribution That's Right for You

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

Boston Foundation, to help you navigate challenges and create, implement and evaluate tailored philanthropic strategies that may include or go beyond grantmaking.

Meeting Your Goals Through a Donor Advised Fund

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

Incorporating Charitable Giving Into Your Estate Planning

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

Having an Impact Through the Civic Leadership Fund

Many Boston Foundation donors and others make an annual gift to the Civic Leadership Fund, which fuels innovation by helping the Foundation identify and address critical challenges facing our community. Through gifts to this fund, the

Foundation publishes cutting-edge research, holds compelling public forums and creates action plans for positive change, making real progress in education reform, health and wellness, smart-growth housing and our cultural infrastructure.

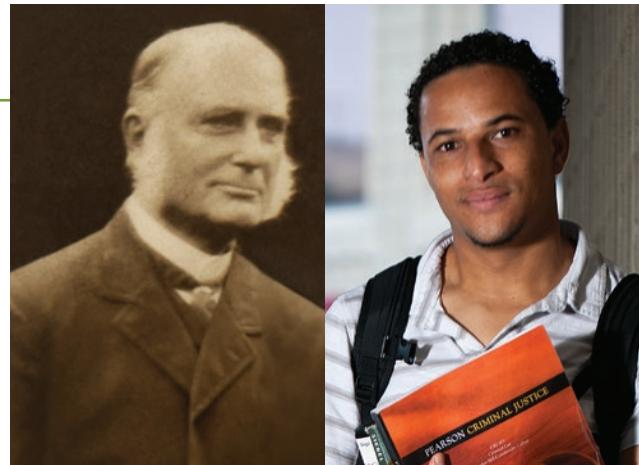
with The Philanthropic Initiatives (TPI) creates new avenues to increase the impact of your giving—whether it is focused locally, nationally or internationally and regardless of the giving vehicles you use.

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

A Merger to Strengthen Our Community

In early 2012, the Boston Foundation entered into a historic partnership to offer a new level of customized consulting and support to our donors and the broader community. Our merger

What Will **You** Be Doing in **100 Years?**



Help Us Build the Permanent Fund for Boston

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

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

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

We Invite You to Join Us

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

For more information about helping us build the Permanent Fund for Boston, becoming a donor or working with TPI, call the Development Office at 617-338-1700 or visit the Foundation's website at www.tbf.org and choose Giving.

2012 Financials

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

Fund for the 21st Century

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

Financial Oversight

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

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

The Spending Policy

By using a spending policy, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2012 spending rate was 6.4% for its permanently restricted discretionary funds.

Investment Performance: *as of June 30, 2012*

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

Benchmarks:

S & P 500 Stock Index	5.4%	16.4%	0.2%	5.3%
MSCI All Country World Stock Index	(6.5)%	10.8%	(2.7)%	5.7%
65% S & P 500 Index/35% BC Aggregate Index	6.6%	13.4%	2.9%	5.8%
65% MSCI A.C. World/35% Citigroup World Bond Index	(2.9)%	9.2%	1.2%	6.5%
Three Month Treasury Bills	0.04%	0.09%	0.9%	1.8%

Notes: Performance is shown net of investment manager fees. Past performance is no indication of future results.

For Fiscal Year 2013, the Board again approved a spending rate of 6.4%. The Foundation uses a smoothing mechanism that helps balance the current endowment market value and the previous level of spending. Spending is equal to 70% of spending from the previous year, adjusted for inflation, plus 30% of the 6.4% spending rate applied to the current market value.

Merger with The Philanthropic Initiative

Effective January 1, 2012 the Philanthropic Initiative, Inc. (TPI) merged with the Boston Foundation as a new and significant business unit of the Foundation. TPI designs, carries out and evaluates philanthropic programs for individual donors, families, foundations and corporations. The experience and reputation of TPI have significantly expanded the range of philanthropic services the Foundation now offers. During the six-month period ending June 30, 2012, the operations of TPI added \$1,053,000 of service fee income to the operations of the Foundation. In addition, TPI's net assets of \$600,000 at the time of the merger have been recognized as a contribution due to merger.

Financial Analysis

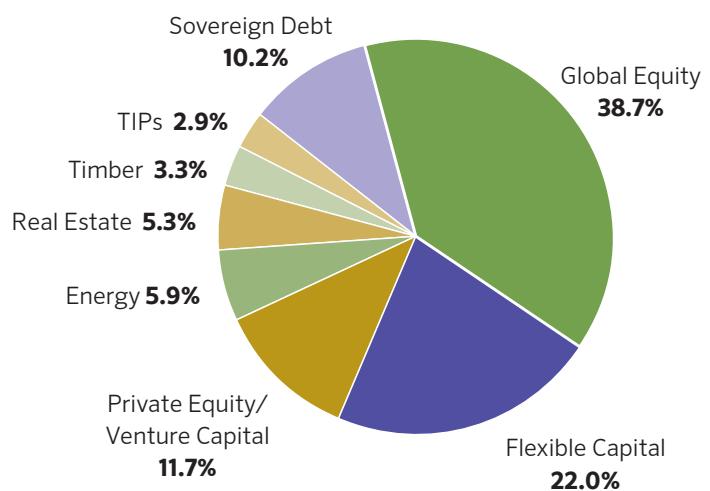
Total assets of the Boston Foundation declined from \$860 million at June 30, 2011 to \$804 million at June 30, 2012. For the year net investment returns were 0.0%. During this period, the Foundation received \$59.8 million of contributions and made \$98.4 million of grants. Expenditures for program support and operating expenses totaled \$17.9 million thus explaining the change in total assets. Although the investment environment was uncertain during the year, the Foundation continued its investment in the communities that it serves.

Audited Financial Statements

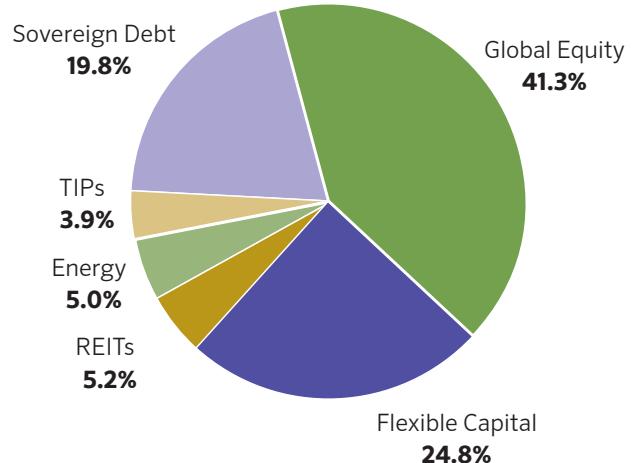
The Foundation's financial statements are prepared under policies and procedures overseen by the Foundation's independent Audit Committee and the Board of Directors. The statements are audited by KPMG LLP. A summary of the audited financial statements is shown on page 36. The audited statements and form 990 are available on our web site at www.tbf.org.

Asset Allocation

Balanced Plus Pool



Balanced Pool



2012 and 2011 Summary Financial Statements

(in thousands)

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

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

Boston Foundation Funds

For close to 100 years, hundreds of individuals, families and businesses have strengthened the Greater Boston community immeasurably by establishing and contributing to funds at the Boston Foundation. The Foundation works closely with donors to strengthen their giving—and helps an ever expanding number of individuals and families take advantage of planned and legacy giving opportunities to benefit the future of our community. The following pages list all of the funds that are held by the Foundation and the many donors who have contributed to them. Each fund has its own name, purpose and history, but all of them gain strength from being managed and invested together—and all of them contribute to strengthening Greater Boston's community foundation for today and the future.

New Donors to the Permanent Fund for Boston

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

Anonymous Fund at the Boston Foundation

Geraldine Ballotti

Maria E. Benet and Joseph T. Geller

Buckman Fund at the Boston Foundation

Wendy Chen

Dawn-Marie Driscoll

Field Parker Fund at the Boston Foundation

Frank B. Thayer Fund at the Boston Foundation

Estate of Anne C. Gray

Brian Hyde

David Kalan

Barbara Keezell

John Kinny

David and Jane Kislak

Bayard Klimasmith

Brooke L. Manfredi, Esq.

Mason Charitable Remainder Annuity Trust

William Morgan

Orpheus Fund at the Boston Foundation

Emma K. & Richard Pigeon Fund at the Boston Foundation

Jordan S. Ruboy

Walter J. and Marjorie B. Salmon

Dana P. & Maude E. Simosno Memorial Fund at the Boston Foundation

Betty L. Singer

Reynolds R. and Pamela M. Smith Foundation

Barbara Starr Wolf

Satya Thakkar

H. Reed Witherby and Ivers Bever

Hungwah Yu and David J. Elliott

49 New Funds were Established in Fiscal Year 2012

Discretionary Funds

Equality Endowment Fund

Latino Legacy Fund

Designated Funds

1819 Greek Revival Renewal Fund
All Hands Volunteers Sustainability Fund (AHVSF)

Committee to Light Commonwealth Avenue Mall Fund

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

Donor Advised Funds

Anonymous (6)

APOC Fund

Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund

Bither Charitable Fund

Butler's Hole East

Butler's Hole North

Butler's Hole South

Crane Fund

William J. Ducas Charitable Fund

Edgerley Family Fund

Elliott and Yu Education Fund

Flower Hill Fund

Giudice Family Fund

Gordon Place Charitable Fund

Tim and Carolyn Grimes Charitable Fund

Haiti Sustainable School Fund

Emily C. Hood Fund

Hope and David Jeffrey Fund

Kindling Fund

Longfield Family Foundation

May-McClain Charitable Gift Fund

Eric and Sue May Charitable Fund

The Boston Foundation gratefully acknowledges the generous and community-minded people who established new funds at the Boston Foundation during 2012.

continued on next page

Planned and Legacy Gifts Received

Donor Advised Funds continued

The Modi Family Pass The Luck Foundation
Andy Morris and Lynne Salkin Morris Family Fund
Mystic River Watershed Environmental Fund
Primary Care Progress Fund
Brian D. Robertson Foundation Fund
Sands Family Fund
ThreeBees Fund
Anita Barker Weeks Charitable Gift Fund

Field of Interest Funds

Equality Grantmaking Fund
Kellogg Foundation Fund for Haiti

Special Initiative Funds

Community Foundation Global Giving Network
Culture for Change
Designing Schools 2.0 Fund
Fairmount Cultural Corridor Fund
Healthy People/Healthy Economy
New England International Donors

Many Boston Foundation donors and others take advantage of the opportunity to make gifts to the Foundation through a broad and diverse group of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, and gifts of retirement plan assets and life insurance. Many of these gifts will support the Permanent Fund for Boston, which allows the Foundation to conduct its grantmaking in the Greater Boston community. The following planned and legacy gifts were received in 2012 and are very gratefully acknowledged.

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

Rogerson Legacy Society

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

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		Michael N. and Mary M. Wood
		Eleanor D. Young
		Anonymous Society Members = 82
		* Deceased
		Bold Names = Permanent Fund for Boston & Field of Interest Gifts

Donors to the Civic Leadership Fund

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

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New Community Fund
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Discretionary Funds

Many donors have established funds that are totally unrestricted or have quite broad purposes, giving the Boston Foundation flexibility in the way the income is used. These are the primary funds for which Greater Boston area nonprofit organizations may apply. They provide support to programs that address a broad range of community needs. The following is a list of all Discretionary Funds established at the Boston Foundation since 1915.

The Permanent Fund for Boston

The Permanent Fund for Boston is the most flexible fund the Boston Foundation holds, giving our staff and board the crucial resources they need to respond to the most critical issues facing contemporary Greater Boston.

The Foundation is dedicated to building this important fund that supports crucial activities in education, health, housing, workforce development, arts and culture—and all areas that have an impact on Greater Boston.

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

Individuals, Corporations and Foundations

Anonymous (2004)
Mr. and Mrs. Pelealter Brooke (1994)
The Boston Company (1991)
Brother Thomas Charitable Foundation (2007)
Peggy A. Brown (2008)
Henry Burkhardt, III (1986)
Catherine and Paul Buttenwieser Foundation (2003)
William Putnam Cabot (1970)
Linda Cabot Black Foundation (2005)
Dorothy Jordan Chadwick Fund (2002)
Chester County Community Foundation, Inc. (2007)
Combined Jewish Philanthropies of Greater Boston, Inc. (2007)
Commonwealth of Massachusetts (2009)
Michael F. Cronin (2004)
Lawrence and Susan Daniels Family Foundation (2003)
Wm. Arthur Dupee Memorial Fund (1984)
Virginia Ellis Memorial Fund (1976)
Leon R. Eyges Memorial Fund (1963)
George R. Farnum (1982)
First National Bank of Chicago (1988)
Martha M. Fosdick Fund (1978)
John Lowell Gardner Fund (1987)
Grand Bostonians Dinner (1984)
Anne C. Gray (2010)
Mrs. Jean Hanlon (1991)
Haymarket People's Fund (1994)

HBB Foundation (1995)
Katherine B. Hood (2000)
Donald J. Hurley Memorial Fund (1978)
Jane W. Hyman (2002)
Institute for Affirmative Action (2007)
Stephen P. Jonas (2007)
John S. and James L. Knight Foundation (2009)
Dr. & Mrs. Arthur R. Kravitz (1987)
Mr. and Mrs. Gael Mahony (1982)
Wilbert G. and Eunice Muttart Foundation (2007)
Northern Trust (2005)
The Overbrook Foundation (1991)
Francis Ward Paine Foundation, Inc. (1982)
Philanthropic Collaborative, Inc. (2005)
Harry & Minnie Rodwin Memorial Fund (1975)
Pamela M. Smith (2006)
Reynolds R. and Pamela M. Smith Foundation (2008)
Dr. W. Davies Sohier, Jr. (1990)
Mrs. Helen Spaulding (1992)
Starr Foundation (2005)
Matthew J. & Gilda F. Strazzula Foundation (2000)
Gertrude T. Taft (1956)
Tech/Ops, Inc. (1982)
United Asset Management Corporation (1994)
Ms. Hungway Yu and Mr. David J. Elliott (2002)
Albert and Judith Zabin (2008)

Trusts

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

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

Estates

Alice A. Abbott (1967)
 Emily T. Allen (2006)
 Matilda S. Alley (1964)
 Miriam S. Alley (1965)
 Margaret Sears Atwood (1970)
 Margaret E. Babcock (1973)
 Annie O. Baldwin (1953)
 Wilbert S. Bartlett (1969)
 George P. Beech (2009)
 Reginald Benting (1984)
 William L. Birely (1959)
 Edmund Bridge (1933)
 Frederick W. Bridge (1942)
 Jesse F. Burton (1971)
 Susan Cabot (1947)
 Charles T. Carruth (1983)
 Gladys Chiquoine (1983)
 Helen A. Claflin (1992)
 William H. Claflin (1983)
 Winifred I. Clapp (1990)
 Horace W. Cole (1992)
 Anastasia Conte (1988)
 Arthur S. Cummings (1943)
 Charlotte E. H. Curtis (1940)

Maria Corinne Dana (1963)
 Luisita L. Denghausen (1990)
 Kenneth S. Domett (1960)
 Mary Frances Drown (1929)
 George H. Eastman (1971)
 Mary Farr (2006)
 Lucy Fields (2008)
 Benjamin Fisher (1996)
 Edith R. Fottler (1948)
 Alma L. Frost (1948)
 Anna C. Frothingham (1941)
 Forrest C. Gates (1970)
 Mary M. Geist (1982)
 Pauline S. Germeshausen (2006)
 Anne C. Gray (2010)
 Donald Gregg (1963)
 Patricia Grisham (1964)
 Joseph Guild (1964)
 John Hagopian (2002)
 Ellen Page Hall (1931)
 Dorothy C. Harris (1967)
 Elizabeth M. Hay (1972)
 Fred R. Hayward (1969)
 Elizabeth D. Herteli Trust (2005)
 Vladimir H. Herteli Trust (2005)

Anna P. Hills (1969)
 Harry Holland (2007)
 Agnes G. Homes (1961)
 Adeline D. Hooper (1973)
 Mary Frothingham Hooper (1961)
 Elizabeth B. Hough (2002)
 Elizabeth B. Hurley (2000)
 Frances A. Jordan (1978)
 Paul Kimball (1964)
 James G. Knowles (1982)
 Ida Fales Lamb (1967)
 James Longley (1918)
 Clara N. Marshall (1943)
 Ann G. McFarlane (2000)
 Arthur W. Moors (1950)
 John Wells Morss (1940)
 John Adams Paine (1967)
 Winthrop D. Parker (1967)
 Annie S. Penfield (1979)
 Blanche E. Philbrick (Merchant E. Philbrick Fund) (1965)
 Mary N. Phillips (1974)
 J. Christie Pingree (1957)
 Carrietta W. Proverbs (1984)
 Bertha J. Richardson (1975)
 Frank L. Richardson (1975)

Mabel Louise Riley in memory of Charles Edward (1972)
 Riley and Agnes Winslow Riley (1972)
 Jordan S. Ruboy, M.D. (2011)
 Helen S. Sharp (1966)
 Frank R. Shepard (1954)
 Anne G. Shewell (1984)
 Alice Wilder Smith in memory of Frank Langdon Smith (1968)
 Eleanor Smith (1986)
 Pamela M. Smith (2008)
 Francis M. Stanwood (1961)
 Albert J. Stone, Jr. (1960)
 Mary P. Stone (1948)
 Lenna R. Townsend (1952)
 Willis S. Vincent (1940)
 Clarice M. Wagner (1993)
 John M. Ward (1927)
 Madeline Cobb Webber (1973)
 Louise M. Weeks (1944)
 Arthur W. Wheelwright (1963)
 Estate of Stetson Whitcher (2008)
 Joseph A. White (1979)
 Edward E. Williams (1950)
 Lizzie A. Williams (1951)
 Albert and Judith Zabin (2007)

Named Funds and Field of Interest Funds

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

Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics
 Emily Tuckerman Allen Fund (2006)
 Anonymous Fund (1987) unrestricted
 Edith M. Ashley Fund (1960) primarily for the aid of blind and crippled persons
 Geno A. Ballotti Fund (1984) unrestricted
 Irene W. Bancroft Fund (1997) unrestricted
 Harriett M. Bartlett Fund (1987) unrestricted
 Diane Heath Beever Memorial Fund (2008) to support programs that address substance abuse and/or mental illness, with a primary focus on prevention
 J. E. Adrien Blais Fund I (1967) unrestricted except that "not more than fifty percent" of the income is to be paid to two named agencies and for research and care for the elderly

continued on next page

Named Funds and Field of Interest Funds continued

- J. E. Adrien Blais Fund II (1967) for the relief, support or assistance of poor or needy Massachusetts residents
- J. E. Adrien Blais Fund III (1967) for the relief of needy and deserving persons who have or have had tuberculosis or who suffer from respiratory illness or disease
- Boston Foundation Arts Fund (1997) for the Boston Foundation's Arts Initiative
- Edith Allanbrook Fund (2002) to provide for children with extraordinary promise in the area of the arts
- Anna Faith Jones Arts Fund (2000) part of the Boston Foundation's Arts Fund, recognizing and honoring the leadership and service of Anna Faith Jones and her special commitment to supporting the arts
- Edward Hyde Cox Fund (2000) for support of programs involving classical music, painting and/or sculpture
- MassDevelopment Arts Fund for Community and Economic Development (2003) A sub-fund of the Boston Foundation Arts Fund, was established by MassDevelopment to make grants to arts, cultural and community-based nonprofit organizations conducting arts and cultural development projects or studies
- Brother Thomas Fund (2007) dedicated to the support of organizations and activities that benefit, support, encourage or celebrate struggling artists working in any and all media in the Greater Boston area
- Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund
- Boston Parks Access Fund (2002) distributions of income will be made on a quarterly basis to the Boston Parks Department or the Arnold Arboretum of Harvard or to the administrators of other public park land within the City of Boston boundaries
- Franklin S. & Cynthia B. Browning Fund (1988)
- Emily Budd Fund (1960) for fresh air vacations for under-privileged children
- Camping Associates of Roslindale & Milton Fund (1981) for camping programs in the Greater Boston area
- Community Organizing & Advocacy Endowment Fund (1988) to support low-income neighborhood grassroots organizing and advocacy focused on institutional change
- Coolidge Christian Education Fund (1993) for Christian scholarship and the promotion of Christian values among young people through education and music
- Curtis International Council Fund (2000) to promote international peace and understanding and to foster cooperation and increase communication among diverse organizations in the Boston metropolitan area active in the field of international relations
- David W. Cushing Fund (1987) for charitable work as shall assist young people, particularly women
- Frank B. & Watson G. Cutter Fund (1984) unrestricted
- Mabel Walsh Danforth Fund (1949) for education, assistance or relief of crippled children
- James Dean Fund (1946) unrestricted but with preference for projects of maritime nature
- Virginia Herrick Deknatel Fund for Children's Services (2001) to be used for children's services
- Major Arthur M. Digges Foundation Fund (1993) to aid Massachusetts disabled and sick soldiers, sailors and women who have been in the US military, naval or nursing services during any war or to aid any Massachusetts hospital or institution to care for these individuals
- Annie S. Dillaway Fund (1965) primarily to promote the welfare of boys and girls and young people
- Katherine E. Dooley Fund (1997) unrestricted
- East Boston Chelsea Environmental Fund (2005) for projects, programs and organizations in Chelsea or East Boston, Massachusetts
- Kate Ellis Fund (1953) for convalescents, children, blind and deaf persons, and homes for Protestant aged men and women
- Ruby C. Emerson Fund (1966) for the college education of young people of the Protestant denomination
- Equality Endowment Fund (2011) for ongoing support to local and regional charitable organizations that are advancing the equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer ("LGBTQ") people and their families in Greater Boston
- Equality Grantmaking Fund (2011) for annual grant support to local and regional charitable organizations that are advancing the equitable treatment of Lesbian, Gay, Bi-Sexual, Transgender and Queer ("LGBTQ") people and their families in Greater Boston
- Mary C. Farr Arts Fund (2005) for the enhancement of cultural affairs in Boston such as support for the Boston Ballet, for scholarships for needy residents and for support of needy residents of Boston
- Herbert and Lucy Fields Fund (2008)
- Frederika Home Fund (1979) for the benefit and welfare of elderly men and women, and for research into the care of elderly
- Fund for the Environment (formerly the Fund for the Preservation of Wildlife and Natural Areas) (1994)
- Allyn Cox Fund for Essex County Greenbelt (1994) for the benefit of the Essex County Greenbelt Association
- Herbert Farnsworth Fund (1994)
- New England Forestry Foundation Fund (1996) for the New England Forestry Foundation to aid conservation of forest land in New England
- Gaywest Farm Fund (1994) for the benefit of Capen Hill Nature Sanctuary in Charlton, Massachusetts
- General Fund for Preservation of Wildlife and Natural Areas (1994)
- Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society
- Hollis D. Leverett Memorial Fund (1994) For planting and upkeep of trees, shrubs and other plants which promote and encourage bird life; primarily on land in New England owned or controlled by conservation organizations
- Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts
- Ruth and Henry Walter Fund (2010)
- General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Boston Public Schools Foundation, Inc.
- Edward Glines Fund (1938) unrestricted
- Elizabeth D. Goldsmith Fund for Families (2010) to support families in the greater Boston area
- Haiti Relief and Reconstruction Fund (2010)
- Rev. Ray A. Hammond Fund for the Neighborhoods of Boston (2009)
- Charles W. Hapgood Trust Fund (1986) 40% of income received for educational purposes at the Massachusetts Institute of Technology or some similar institution, or for the promotion of health and the alleviation of suffering at Massachusetts General Hospital or some similar institution
- Harcourt Family Fund (2001) for organizations in the Greater Boston area which are dedicated to Christian values, traditional families and activities designed to fulfill and support the lives of the born and unborn, such as feeding the hungry, clothing the naked, sheltering the homeless
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- Grace L. Holland Fund (2007) To assist in the rehabilitation of handicapped children
- Theodore C. Hollander Trust Fund (1929) income to be used "in part" for hospitals, education and the improvement of American citizenship
- Nathaniel Hooper Fund (1938) unrestricted
- Grace A. Jacobs Fund (1988) unrestricted
- Jacoby Club of Boston Fund (1984) to provide kindly, personal help and concern for disadvantaged, local, elderly individuals and/or to support work in the field of alcoholism and/or other addictive substances

- Jamaica Plain Dispensary Fund (1962) for the benefit of poor people in or near Jamaica Plain, particularly for health related needs
- Charles Frederick Joy and Dora Marie Joy Fund (1992) income to be used for summer vacations for two worthy Protestant girls and one boy and any excess income shall be used to help in the care of sick Protestant children or Protestant girls or women
- Kellogg Foundation Fund for Haiti (2012)
- Thomas F. Lambert, Jr. and Elizabeth Branor Lambert Fund (2006) unrestricted
- Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis
- Latino Legacy Fund (2012) to strengthen Latino nonprofits and leaders, improving educational outcomes for Latino children, creating economic opportunities for Latino families and improving health and overall quality of life for Latino families
- Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye
- Azad & Doris Maranjian Charitable Trust Fund (2009) to be used for organizations committed to maintaining the physical health of the general population as well as targeted populations of the disabled; for cultural and educational enrichment; for those dedicated to preserving and defending the Constitution; and the Azad and Doris Maranjian Humanitarian Award given to any outstanding individual who has demonstrated an ability to further ennoble the human species and the human spirit
- Massachusetts Civic League Fund (1983) to promote sound government
- Willis Munro Fund (1989) for the relief, care, health, comfort, maintenance and support of needy adults or in maintaining and operating a home for needy adults in Boston or to furnish funds for the purpose of enabling such persons to live in their own homes
- Harry L. Nason Fund (1953) preferably for the care of Protestant aged men and women
- Florence Arnaud Newton Fund (1955) for the care and rehabilitation of needy persons suffering from tuberculosis and respiratory illness or disease
- Grace G. North Fund (1954) for aid to needy gentlewomen
- Out of the Blue Grants Fund (2002) for unsolicited and unrestricted Boston Foundation grants made to nonprofits that have outstanding leadership and engage in truly exceptional work
- Augustus Page and Grace Fagan Browne Memorial Endowment Fund (2006) to be used to make grants to nonprofit organizations in Greater Boston that provide for the needs of the poorest of the poor, especially their needs for food, shelter and health care
- Norman Everett Pearl Fund (1996) for recognized charities in the Boston area
- Janet S. & George T.B. Perkins Fund (2000) for the benefit of children living in Boston, including programs to benefit their health or education, and for the benefit of organizations (such as, symphonies, orchestras, choral groups, nonprofit radio and television stations) providing musical programs
- Permanent Fund for Boston (1980) unrestricted
- Louise Phillips Bequest Fund (2003) for the benefit of the public with free music and ballet concerts to be offered in the summer and to be performed at the Hatch Shell on the Esplanade in Boston by the Charles River
- Henry L. Pierce Fund (1958) for promotion of musical education or the development of public interest in music
- David R. Pokross Fund for Children in Need (1996) for organizations that provide for childhood enrichment, health care, safety, education and other programs for Greater Boston's children
- Ruth M. Reiss Memorial Fund (1997) unrestricted
- Samuel H. & Lizzie M. Robie Trust Fund (1982) for charitable organizations located in Chelsea
- Harriet Rogers Fund (1990)
- Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind
- Walter J. & Marjorie B. Salmon Fund (1999) unrestricted
- Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children
- Katherine Dexter Sherman Fund (1954) for the benefit of worthy aged people
- Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs designed to bring about improvements in adoption procedures
- Sophia Snow Fund (1948) for care and support of destitute children of Roxbury
- Helen & Marion Storr Fund (1986) for the care and benefit of elderly persons in Massachusetts, particularly those not cared for in institutions
- Stuart-Jones Trust Fund of the All Souls Lend A Hand Club, Inc. (1994) for care of poor and elderly people who are in need, especially women
- Carroll J. Swan Memorial Fund for Children's Charities (1935) for summer vacations for needy children of Greater Boston
- Robert Wadsworth Fund for the Future of Boston (2008)
- Abraham & Esther Walerstein Fund (1981) for the support of the elderly
- Nelson E. Weeks Fund (1937) for alleviation of suffering in Boston hospitals
- Fanny Wharton Fund (1919) for the relief of sick young women and children
- Katherine C. Wheeler Fund (1987) to increase knowledge of good government and for the encouragement of good citizenship
- Arthur L. Williston and Irene S. Williston Trust For Education (1953) to provide assistance, educational aid and training at institutions other than usual four year colleges
- Mary Denny Williston Fund (1969) for summer camp vacations for children; for work with alcoholics
- Window Shop Fund (1988) (Marion Gordon Bever Memorial Fund) to provide educational aid including but not limited to the ACCESS Program and other assistance for refugees and foreign born residents of the United States
- Gladys W. Yetton Fund (1969) for widows and single women in straitened circumstances

Special Initiative Funds

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

- Achieving the Dream Initiative Fund (2007) a multiyear national initiative created to strengthen the ability of community colleges to help students of color and low-income students earn degrees and certificates by using data to close achievement gaps
- Action Fund (2010) for unsolicited support of programmatic opportunities or challenges that advance Boston Foundation goals and objectives
- After School for All Partnership Fund (2003) for the Foundation's After School Initiative
- Allied Health Fund (2010) for the Allied Health Worker Initiative
- Arts Capitalization Technical Assistance Fund (2010)
- Boston Community AIDS Partnership Fund (1993) for prevention programs which target high-risk populations in Greater Boston—specifically communities of color
- Boston Indicators of Change, Progress and Sustainability Project (1998) to examine Boston's strengths and challenges that impact the quality of life of people who live and work in the City of Boston

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Special Initiative Funds continued

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

Catalyst Fund for Nonprofits (2009)

CHAMPS Boston (2009)

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

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

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

Designing Schools 2.0 Fund (2011)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Ansin Fund (2002) a component fund for the United Way Millennium Fund for Children and Families

Chelsea Boys and Girls Club Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; a portion of distribution for the Chelsea Boys & Girls Club

Connell Family Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

Carol R. & Avram J. Goldberg Fund (2002) a component fund of the United Way Millennium Fund for Children and Families

Lawrence & Beth Greenberg Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

Darlene & Jerry Jordan Fund for Children (2000) a component fund of the United Way Millennium Fund for Children and Families

Margarete McNeice Fund (2001) a component fund of the United Way Millennium Fund for Children and Families

David R. and Muriel K. Pokross Fund (2003) a component fund for the United Way Millennium Fund for Children and Families

Schoen Family Fund (1999) a component fund of the United Way Millennium Fund for Children and Families

Tom & Nancy Shepherd Fund (2001) a component fund of the United Way Millennium Fund for Children and Families

State Street Foundation Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

J.C. Tempel Fund for Children (2001) a component fund of the United Way Millennium Fund for Children and Families

Vinik Family Fund (2000) a component fund of the United Way Millennium Fund for Children and Families

Peter and Pamela Voss Fund (2000) a component fund of the United Way Millennium Fund for Children and Families; for the "Keeping Kids On Track" Program

Vision Fund (1994) for small grants to community organizations for planning, development and training

Wallace Foundation Fund (2007) to coordinate knowledge sharing activities among the Wallace Foundation Excellence Awardees in Boston

Designated Funds

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

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

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

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

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

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

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

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

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

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

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

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

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

Be the Change Fund (2007)

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Committee to Light Commonwealth Avenue Mall Fund (2011)

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

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

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

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

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

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Designated Funds continued

- Dedham Choral Society Endowment Fund (1991) (including the Brian Jones Fund) for the Dedham Choral Society, Inc.
- Harry Ellis Dickson Youth Concerts Fund (1982) for support of a program that offers a special Boston Symphony Orchestra concert series to young people in the New England area
- Duggan Charity Fund (1998) for Canton High School
- East Boston Social Centers, Inc. Fund (1996) for the East Boston Social Centers, Inc.
- Douglas A. Eaton Memorial Fund (1962) for scholarships to members of the graduating class of Hingham High School
- Michael Eliot Fund for the Arts (1992) To provide scholarships & fellowships for students of the fine arts with preference to those studying in the field of sculpture.
- William V. Ellis Fund for Our Lady of Good Voyage Carillon (2011) English High School Class of 1934 Award Fund (1994) for a scholarship to a Boston English High School student with preference given to students who show marked improvement and particularly those who are succeeding in spite of adverse circumstances
- English High School – John Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School
- Gustavus John Esselen Award for Chemistry in the Public Interest Fund (2008) to support the Gustavus John Esselen Award for Chemistry in the Public Interest as outlined in the organizational by-laws of the Northeastern Section of the American Chemical Society, Inc.
- Philip M. Fagan Family Fund (1971) for Combined Jewish Philanthropies of Greater Boston
- Paul R. & Jacqueline D. Fehrenbach Family Fund (1999) for Junior Achievement of Eastern Massachusetts
- Benjamin M. Feinberg Fund (1962) for Hebrew College
- Arthur Fiedler Esplanade Concerts Fund (1980) for the support of free concerts on the Esplanade
- Food and Fuel Fund (2008)
- Felix Fox Memorial Fund (1974) for the Community Music Center of Boston
- Americo Francisco Fund, Estate & Realty / Charitable Trusts (1998) for the benefit of thirty named charities
- Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy
- John & Ethel Goldberg Fund I (1984) for the benefit of Brandeis University and West End House, Inc.
- John & Ethel Goldberg Fund IV (1984) for support of eye retina research and related eye research technology
- John & Ethel Goldberg Fund V (1984) for the continuing professional education of Massachusetts judges in subjects directly pertinent to the performance of their judicial and administrative duties
- John & Ethel Goldberg Fund VI (1984) for Suffolk University Law School for the "needs of the law school with respect to scholarship and maintenance or renovations to the buildings housing the law school"
- Barbara W. & Frank B. Gopen Fund (1978) for the benefit of Massachusetts General Hospital and the Arthritis Foundation
- Walter W. Gove Fund (1972) for two named agencies
- Elizabeth Grant Fund (1980) for five named agencies
- Greatrex Scholarship Fund (1988) for scholarship awards to Foxborough Massachusetts students who are in need of financial aid to attend college, trade school or nursing hospital
- Rosario Fajardo Hagan Fund (1991) for the Life Experience School
- Patricia Jellinek Hallowell Fund (1992) for support of the Patricia Jellinek Hallowell Scholarship Fund at the Museum School, Museum of Fine Arts
- Hastings-Plummer Fund (1940) for Crittenton Hastings House of the Florence Crittenton League, in part for special purposes
- Benjamin Patrick Hermann Fund (2002) for the New England Conservatory's efforts to recruit accomplished cellists to teach cello master classes in the extension division
- Jorge N. Hernandez Fund (1987) for support of the Jorge N. Hernandez Cultural Center
- Gertrude Hooper Fund (1996) for benefit of the Crime and Justice Foundation
- Madeleine C. Huiginn Fund (1993) income to be added annually to principal
- Blanche Hyslop Fund (1982) to three named agencies
- Orchestra of Indian Hill Music Director Fund (2002) Annual distributions will be made to the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra's conductor's chair (\$30,000 per year until the fund is depleted)
- James W. & Margaret A. Ingraham Charitable Fund (1992) for the benefit of five named agencies
- Ella Jackson Artists and Scholars Fund (1982) for the Truro Center for the Arts on Castle Hill
- Patrick F. Jones, Jr. Endowment Fund (1981) for the benefit of the Lena Park Community Development Project
- Donaldson F. Jones Fund (1999) for the benefit of Massachusetts General Hospital / The Claude E. Welch Surgical Research and Education Fund
- William & Sean Kelley Scholarship Fund (2010)
- John F. Kennedy Library Foundation Endowment Fund (1984) for support of the John F. Kennedy Library Foundation
- Demetra Kenneth-Brown Fund (1920) for worthy pupils of the Massachusetts Hospital School
- Alice V. Kidder Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester, MA
- Robert D. and Sally G. King Fund (1999) for the benefit of the Easton Historical Society
- Kit Clark Senior Services Fund (2000) for the benefit of the Kit Clark Senior Services (a program of the FDNH, Inc.)
- Gerald V. Levreault & Claire H. Levreault Fund (2001) net income to be paid one-half to the New England Medical Center, Inc. for the use of the Kiwanis Pediatric Trauma Institute and the remaining one-half to the Kiwanis Club of Upper Cape Cod now known as the Kiwanis Club of New England
- Lawrence B. Lewis Fund (1957) for needy individuals in Round Pond, Maine
- Ralph Lowell Fund (1982) for support of community services of WGBH Educational Foundation
- Gertrude F. & Henry L. Maurer Fund (1998) for the benefit of the North Community Church in Marshfield Hills, Massachusetts
- John S. McCann Fund (2000) for the care, support, education, comfort or entertainment of crippled sick or retarded children of indigent or underprivileged families, at the St. Coletta School or Institution at Hanover, Massachusetts, or other similar institution
- Dorothy Morse Endowment Fund (1999) for the benefit of a Somerville, Massachusetts social services agency that assists girls only from that agency. Currently the program is the "Short Stop" of Somerville, MA
- Harry D. Neary Fund (1950) for five named agencies
- New England Aquarium Education Fund (1983) (Robert G. Stone Fund, Paul F. Hellmuth Fund, Helen B. Spaulding Fund, and the William S. Brewster Fund) to support educational programs at the New England Aquarium
- New England Women's Club Fund (2001) for the primary purpose of establishing a lectureship, known as the New England Women's Club Memorial Lecture Series, devoted to the discussion and study of women's history in Boston
- Roger L. Nichols Internship Program Fund (1984) to support the Museum of Science's Internship Program

- Nixon Peabody Scholarship Fund in Recognition of Retired Managing Partners (1997) for scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs
- Oak Foundation – Home Funders Fund (2007)
- Lottie S. Page Fund (1984) for scholarships for residents of Quincy at nursing school
- Robert Treat Paine Historical Trust Fund (1990) primarily to maintain and preserve the Robert Treat Paine House in Waltham, Massachusetts
- Palazzo San Gervasio Library Fund (1994) for the benefit of the Palazzo San Gervasio Library
- William Morgan Palmer Fund (1977) for the furtherance of Far Eastern studies at institutions of higher learning
- Harold Peabody Memorial Fund (1992) for the Roxbury Multi-Service Center's Scholarship Program
- Permanent Fund for Vocational Education (1979) for the assistance of Boston youth in post secondary vocational education
- Charles & Cornelia Pfaff Fund (1964) for four named hospitals
- Emma K. & Richard Pigeon Fund (1955) half of income for three named agencies on Cape Cod and half unrestricted
- Planned Giving Partnership Fund (1992) to make recoverable grants to smaller nonprofit organizations supported by the Pooled Income Fund donors
- Pooled Income Administrative Fund (1988) from the Lilly Endowment, Rockefeller Brother's Fund and State Street Bank & Trust Company. For the administration of the Planned Giving Partnership
- Primary Care Fellowship Program Fund (1983) to support Harvard Medical School's program of preparing general internists for academic careers
- Charlotte F. & Irving W. Rabb Family Fund (1984) for Boston Symphony Orchestra youth programs
- Katharine Rayner Fund for the New York Public Library (2009) To support the New York Public Library Astor Lenox and Tilden Foundations
- Reading Visiting Nurse Association Fund (1976) for the Combined Visiting Nurse Association of North Reading, Stoneham, Wakefield and Woburn, Inc. for its work in Reading
- Rogers Fund of the Riverside Cemetery (1997) to preserve and maintain the Rogers Mausoleum structures and grounds at the Riverside Cemetery in Fairhaven, Massachusetts
- Henry A. Root Fund (1926) for the Service Pension Society of the Unitarian Universalist Association
- Rose Fund (1981) for the Carol Rabb Goldberg Seminars for Urban Problems at Tufts University
- Fund for Rosie's Place (1984) to benefit Rosie's Place
- Bessie H. Short Fund (1997) for the benefit of elderly residents of the Town of Wrentham, Massachusetts
- Dana P. & Maude E. Simpson Memorial Fund (1998) half of the income for seven named agencies and the other half unrestricted
- Muriel & Otto Snowden Endowment Fund (1984) endowment fund for Freedom House
- Social Law Library Endowment Fund (1982) for the support of various library programs
- Michael Spock Community Service Fund (1980) for support of the Children's Museum outreach services for the Boston community
- Alison L. Stevens Fund (1976) for two named agencies
- Miriam & Sidney Stoneman Fund (1984) to benefit Boston Symphony Orchestra youth activities
- Surfmen's Trust Fund (1977) for the Coast Guard Mutual Assistance Fund
- Agnes & Lewis Taylor Fund (1962) for the Orleans United Methodist Church in Orleans, Massachusetts
- Margaretta Taylor Animal Medical Center Fund (2009) for the Animal Medical Center
- Margaretta Taylor Fund for Brooks School (2009) for the Brooks School
- Margaretta Taylor Eaglebrook School Fund (2009) for the Eaglebrook School
- Frank B. Thayer Fund (1976) for three named agencies, but one-fourth of the income unrestricted
- Pauline Toumpouras Fund (2010) AMB to benefit the Greek Orthodox Chapel and Center, Brookline, MA
- Robert E. Wallace Memorial Fund of the Urban League (1992) to support professional development activities of the Urban League of Eastern Massachusetts, emphasizing programs for youth and education
- Wallace Foundation Fund (2006)
- Inez Washabaugh Ward, PNP, Scholarship Fund (2011) to provide grants to the Summer Fund at Associated Grantmakers (or its successor or suitable alternative agencies) for the purpose of supporting camp scholarships for boys and girls, especially patients of the South End Community Health Center where Ms. Ward was the Pediatric Nurse Practitioner for thirty-four years
- Bradford Washburn Fund (1980) for support of community services of the Museum of Science
- Bill and Estelle Watters Fund (1997) for three named agencies
- Jane Wengren Fund (1979) for the benefit of the Center for International Visitors of Greater Boston
- Stetson Whitcher Fund (1986) to benefit eight named agencies
- Ernesto "Tito" Whittington Scholarship Fund (2007)
- May J. Wikstrom Fund (1998) to support eye retina research
- Rudolph & Sara Wyner Prize Fund (1985) to the New Israel Fund for a prize award (paid every fifth year) to an organization that has made a significant and positive contribution to mutual cooperation and reconciliation among Arabs and Jews in Israel

Donor Advised Funds

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

- 63 Marlborough Street Fund (1984)
A & E Educational Quest Fund (2004)
AADS Memorial Fund (2004)
Walter and Alice Abrams Family Fund (2005)
Maida & George Abrams Fund (1985)
Abromowitz/Ruttenberg Family Fund (2000)
Acacia Fund (2004)
Ad Club Foundation Fund (1987)
Adler Family Fund (2006)
Adlib Foundation (2010)
Adopt-A-Statue Endowment Fund (1988)
Affinity Services Corporation Fund (2003)
Richard and Kimberlee Alemian Fund (1996)
James F. Alenson Memorial Fund (2007)
Aley Fund (2009)
Aliad Fund (1993)
Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)
Rosamond W. Allen Charitable Fund (2004)
Dwight & Stella Allison Fund (1982)
Alper Family Fund (1995)
Ames Foundation Charitable Fund (2009)
George and Nedda Anders Fund (1991)
Carol and Howard Anderson Family Fund (1997)
Barbara Jane Anderson Fund (2000)
Selma and Bayness Andrews Fund (2006)
Michael & Ellen Angino Fund (1997)
Anony Fund (1998)
Ansara Family Fund (2006)
Anthropologists' Fund for Urgent Anthropological Research (1996)
APOC Fund (2011)
Jim Apteker Fund (2006)
Arba Lifnot Boker Fund (1992)
Armony Erel Charitable Fund (2008)
Atalaya Fund (2004)
Atlantic Fund (1997)
Ausschnitt Fund (2004)
Kathryn and Charles Avison – Miriam Avison Charitable Fund (2005)
Susan M. Aygarn and Michael R. Aygarn Charitable Donation Fund (2012)
Katharine & George Baker Fund (1987)
Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)
Balzer/Bellinger Fund (2007)
John & Judith Barber Fund (2002)
Richard Allan Barry Fund (2002)
Baudanza Family Fund (1997)
Baupost Group Charitable Fund (2004)
Beachcomber Fund (2008)
Belinda Fund (2011)
Bellevue Fund (1999)
William D. & Mary E. Benjes Fund (1984)
Jane Bernstein Fund (2006)
Best Doctors Charitable Foundation (2010)
Charlotte Saltonstall Bigham Memorial Fund (2004)
Bird Fund (1999)
Bither Charitable Fund (2012)
Bitpipe Legacy Fund (2004)
Linda Cabot Black Fund (1983)
NICSA / William T. Blackwell Scholarship Fund (1995)
Emmanuel and Jane Blitz Fund (1992)
Tom and Lisa Blumenthal Family Foundation (2005)
Joan T. Bok Fund (1997)
Boston City Hospital Social Service Fund (1981) for medical social treatment, including rehabilitation, of needy patients of Boston Medical Center; for training costs and other costs of social work students in the Boston area
Boston Foundation Employee Matching Gifts Fund (2007)
BPE/Bank of Boston 200th Anniversary Fund (1982)
Braverman Family Fund (1992)
Bronner Charitable Foundation (2006)
Brooke Family Donor Advised Fund (2007)
Peter A. Brooke Fund (1998)
Peter W. and Ruth H. Brooke Fund (2004)
Buckman Fund (2010)
Dean Bullock Family Fund (1997)
Denise A. Burgess Fund (2002)
Bill and Barbara Burgess Fund (2002)
William T. Burgin Fund (2001)
John A. Butler Memorial Fund (1988)
Kairos Butler Fund (1994)
Butler's Hole East (2011)
Butler's Hole Fund (1994)
Butler's Hole North (2011)
Butler's Hole South (2011)
C & K Foundation Fund (2000)
Norman L. Cahners Fund (1984)
Campbell Foundation Fund (2003)
A. Bruce Campbell Fund (2002)
Erin K. Campbell Fund (2002)
C. Alec and Sarah O' H. Casey Charitable Fund (1993)
Margaret W. Casey Fund (1986)
Alice F. Casey Fund (2006)
Ellen W. Casey Fund (1993)
Champa Charitable Foundation Fund (2003)

Charlestown Fund (2008)	Diversity Training Fund (2010)
Charlestown Poor's Fund (2010)	Dodson Family Charitable Fund (2007)
Chasin / Gilden Family Fund (2000)	Doe Noordzij Fund (2001)
Charles Ezekiel and Jane Garfield Cheever Fund I (2006)	Eugene B. & Nina L. Doggett Charitable Fund (1999)
Charles Ezekiel and Jane Garfield Cheever Fund II (2006)	Donor Co-Investment Fund (2004)
Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative	Douglas Drane Family Fund (1984)
Joyce Chen and Helen Chen Foundation Fund (1995)	Drane Center Fund (2002)
Chertavian Family Fund (2005)	William J. Ducas Charitable Fund (2011)
Chevron Fund (1980)	Eagle Bank-Frank E. Woodward Scholarship Fund (1985) for scholarships for Everett residents
Christ on Earth Fund (1989)	Margaret Eagle Foundation Fund (2000)
Michael W. Christian Memorial Fund (1986)	Echo Rock Fund (2000)
Dr. & Mrs. B.U. Chung Fund (1999)	Edgerley Family Fund (2012)
Chung Family Fund (1999)	Egozy Fund (2006)
Churchill Family Fund (1997)	Eisenson Family Fund (2005)
Circle Fund (1997) priority given to organizations which support grassroots organizing for social change	Elliott and Yu Education Fund (2012)
Civic Engagement Fund (2010)	Ellis Family Fund (2003)
CJE Foundation Fund (2007)	Employment Retention Fund (2004)
Clark Family Fund (2010)	Endowment for Children in Crisis (1991)
Clarke Fund (1987)	Gerald Entine Family Trust Fund (2008)
Cohen/Lucas Fund (1999)	EqualLogic Foundation Fund (2008)
Coit Family Fund A (2001)	Ethics Trust Fund (1993)
Colby Charitable Fund (1980)	Evans Family Fund (1999)
Colony Road Fund (1997)	Norris & Constance Evans Charitable Fund (1999)
Commonwealth Rinks Fund (1991)	Excalibur Fund (1999)
Condor Street Fund (1988)	Peter and Ellen Fallon Fund (1997)
Joette & John Cook Fund (1986)	FARM Fund (2006)
Constance and Lewis Counts Fund (1990)	Carol Fazio Charitable Fund (2010)
Coolidge Family Fund (1982)	Robert L. Feinberg Fund (2007)
Cooper Leeser Family Fund (1997)	Ferdinand Fund (2000)
William & Susan Copeland Fund (1990)	First Principle Fund (2006)
Corvelli Fund (1996)	Fisher Family Fund (2000)
Demetrios G. C. & Kimberly A. Coupounas Fund (1996)	Fishreys Family Philanthropic Fund (1999)
George D. & Angelyn K. Coupounas Fund (1994)	Jack Florey Fund (2004)
Jessie B. Cox CLT – Cox Family Fund (2009)	Flower Hill Fund (2012)
Jessie B. Cox Charitable Trust Fund (2008)	Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families
Crane Fund (2012)	Free for All Concert Fund (2011)
Cregan Charitable Fund (2005)	Niki & Alan Friedberg Fund (1986)
Crosby Family Fund (2000)	Orrie M. Friedman Charitable Fund (1995)
Kate Crozier Fund (2007)	David Frisbie Family Charitable Fund (2010)
Tarrant and Laura Cutler Charitable Gift Fund (2008)	FUEL Accounts Fund (2009)
Dainger Fund (1997)	Fulkerson Family Fund (1998)
Darling Family Fund (1983)	Davis R. Fulkerson Fund (1999)
John Da Silva Memorial Fund (1988)	Lyle W. Fulkerson Fund (1999)
John H. Deknatel Family Fund (2009)	Sarah Fulkerson and Robert Le Roy Family Fund (1999)
W. Deknatel Charitable Fund (2009)	Fuller Trust, Inc. Fund (2009)
Sarah Derby and Gary MacDonald (2007)	Fulton Family Fund (2006)
Marshall and Laura Derby Charitable Fund (2007)	Future Fund (2006)
Rebecca Derby and Evan Morton (2007)	Gabrieli Family Fund (1997)
DeWolfe Family Fund (2000)	Gaffney / Kames Foundation Fund (1997)
Larry DiCara Fund (2006)	Galilean Fund (2008)
Dillon Fund (2004)	Ganesh Fund (2001)
Dintersmith-Hazard Foundation Fund (2006)	Gannon Family Charitable Fund (2003)

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Donor Advised Funds continued

Gannon Family S.U.N. Fund (2010)
John Lowell Gardner Fund (1986)
Dave Garroway Fund (1982)
Garuda Fund (2007)
Brad Gatlin Family Fund (1995)
Gaudette Family Fund (2000)
Gergen Family Fund (2009)
Congressman Gerry E. Studds Fund (2006)
Carl J. Gilbert Fund (1984)
Gilbert Fund (2007)
Ginsberg/Kaplan Fund (2011)
Giudice Family Fund (2011)
Glassman Family Fund (1985)
John & Ethel Goldberg Fund II (1984) for support of medical research in the fields of endocrinology and/or nuclear medicine
Carol R. & Avram J. Goldberg Fund (1983)
Golden Family Fund (2000)
Peter G. Gombosi Memorial Fund for Autism Research and Services (2005)
Goodworks Fund (2002)
Gordon Educational Fund (2001)
Gordon Place Charitable Fund (2012)
Sandra & Philip Gordon Family Foundation Fund (2001)
Laurie Gould and Stephen Ansolabehere Fund (2009)
Gravelley Springs Fund (2005)
Green Fund (2011)
Tim and Carolyn Grimes Charitable Fund (2011)
Patricia H. Gross Fund (1999)
Grunebaum Charitable Fund (2006)
Gualala Fund (1991)
Guenzel-Pieters Family Fund (2008)
Charles & Dorothy Gullickson Fund for Social Change (1998)
Mary Haas and Ronald Leavitt Donor Advised Fund (2001)
Jay Habegger and Christine Nagle Fund (2004)
Haiti Sustainable School Fund (2012)
Ken and Becky Hansberry Fund (2001)
George Harrington Trust Fund (1983)
Charlotte C. Hart Family Fund (2001)
J. Allan Hauter Memorial Fund (2004)
James E. Hayden Charitable Fund (2001)
Hebb Charitable Fund (2003)
HEIRS Fund (1996)
Helies Family Fund (2000)
Elizabeth D. Heller Fund (1987)
Henderson Fund (1996)
Fred Henning Fund (1989)
Henry Fund (1986)
E. Byron Hensley Jr. Charitable Fund (1993)
John P. Herrick Fund (2009)
William H. and Jodi A. Hess Charitable Fund (2005)
Hewitt Family Charitable Trust Fund (1993)
Ann S. Higgins Charitable Remainder Unitrust (Unrestricted) (2010)
Ann S. Higgins Fund (2001)
Lucius T. Hill III and Wendy Y. Hill Fund (2000)
Petie Hilsinger Fund (1999)
Marc Hirschmann Foundation Fund (2002)
Hoffman Fund (1986)
Robert L. Hoguet Fund (1981)
Holberger Family Fund (1993)
Holland Family Fund (1993)
Holtzman Fund (2009)
Emily C. Hood Fund (2011)
Gilbert H. Hood Family Fund (1980)
Gilbert H. Hood Jr. Charitable Lead Trust Fund (1980)
Robert Hooper Family Fund (2004)
Hourless Fund (1997)
Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham
Hoyt Family Fund (2000)
Hunt Fund for Children (2001)
Interstitial Fund (2009)
Investing in the Future Fund (2000)
J. Jill Compassion Fund (2002)
Mitchell & Diane Jacobs Fund (1998)
Jade Fund (2007)
JAHELBE Fund (2002)
Japanese Disaster Relief Fund (2011)
Hope and David Jeffrey Fund (2011)
Jochkan Charitable Fund (2001)
Stephen G. & Rosemarie Torres Johnson Family Fund (2000)
Jonas Family Fund (2000)
Samuel Lamar Jordan Trust Fund (2000)
Elizabeth Trichel Joyce Family Fund (2007)
Jumping Rock Fund (2000)
Louis and Marcia Kamentsky Donor Advised Fund (2010)
Beton M. Kaneb Fund (1983)
Albert J. & Diane E. Kaneb Family Fund II (1997)
Patricia A. Kaneb Fund (2003)
Martin & Wendy Kaplan Fund (2006)
Steven E. Karol Charitable Foundation (1999)
Kassler Family Fund (2000)
Elizabeth and Paul Kastner Foundation Fund (2008)
Stephen and Caroline Kaufer Charitable Giving Fund (2004)
Kaye Charitable Fund (2003)
John & Anne-Marie Keane Foundation Fund (1997)
Keewaydin Fund (2001)
Sabina F. Kelly Catholic Charitable Fund (1991)
Kensington Capital Children's Fund (2002)
Keogh Family Fund (2000)
Kidder SBSM (Strong Body, Strong Mind) Fund (2005)
Kidder Smith Fund (2003)
M. R. Kidder Charitable Fund (2004)
Kindling Fund (2011)
John Thomas Kittredge and Charles R. Morehead Fund (2011)
KJN Family Fund (1997)
Kluchman Family Fund (1997)
Allen and Elizabeth Kluchman Fund (1997)

Klureza Family Fund (1997)
Pamela Kohlberg Fund (1995)
Stephen P. Koster Fund (1985)
Kravitz Family Fund (1993)
Joseph and Lisa Krivickas Family Fund (2006)
Gregory and Deborah Laham Family Charitable Fund (2011)
Lorin A. Lavidor and Eric E. Berman Charitable Fund (2005)
Lawrence Family Fund (2009)
Barbara Lee Family Foundation Fund (2004)
Roger & Clarissa Lee Family Fund (2009)
Thomas E. & Barbara B. Leggat Fund (1986)
C. Martin Leinwand Fund (1986)
Colman & Carol Levin Fund (2000)
Levine Family Charitable Fund (2003)
Levitt Family Fund (2000)
Lewis Family Fund (2007)
Charlotte Ruth Lewis Fund (1998)
Henry R. Lewis Family Fund (2007)
Southard Lippincott Fund (1996)
Lissy Family Fund (2008)
John S. Llewellyn, Jr. Community Assistance Fund (1996)
LMG Fund (1997)
Marjorie L. and James M. Lober Fund (2010)
LOC Fund (2009)
Joan Locatelli Foley Memorial Fund A (1997)
Joan Locatelli Foley Memorial Fund D (1997)
GC & JW Lodge Fund (2000)
Longfield Family Foundation (2011)
Loomis Sayles Charitable Fund (2007)
Lord-Buck Fund (1996)
Bruce Lunder Fund (1982)
John Lowell Lyman & Cynthia Forbes Lyman Fund (2007)
Donald J. & S. Kelley MacDonald Charitable Fund (1998)
Magic Penny Fund (1997)
Mann Family Fund (2010)
Margaret Hixon Fund (2007)
William G. Markos Fund (1982)
Evelyn A. Marran Fund (1983)
Martin Fund (1998)
Mason-Brown Fund (2008)
Match School Scholarship Fund (2007) for Match School scholarships
May-McClain Charitable Gift Fund (2012)
Eric and Sue May Charitable Fund (2012)
Mayel Fund (1982)
William and Linda McCabe Fund (1994)
Richard & Judith McGinnis Fund (1999)
Eleanor P. McIntyre Fund (2001)
McNeill Family Fund (1997)
McSweeney Family Charitable Fund (2009)
Medical Research Fund (1992) to support medical research in the fields of endocrinology and/or nuclear medicine
Emily & Bernard H. Mehlman Fund (2002)
Mellowes Fund (1998)
Leila Yassa & David Mendels Fund (2000)
Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)
Meyer Foundation (2006)
Allan Meyers Fund for the Advancement of Careers in Disability (2000)
Michon Family Fund (1986)
Microsoft Unlimited Potential Fund (2005)
Mid-Century Fund (2004)
J. F. Middleton Family Fund (1995)
Mill River Foundation Fund (2004)
Gabrielle J. Miller Donor Advised Fund (2004)
Anita L. Mishler Education Fund (1983)
Moccasin Brook (2000)
The Modi Family Pass The Luck Foundation (2012)
Molino Family Fund (2003)
Monadnock Fund (2002)
Mormann Family Fund (2006)
Andy Morris and Lynne Salkin Morris Family Fund (2011)
Robert S. Morris Advised Fund (2000)
Muddy Pond Trust Fund (1994)
David G. Mugar Fund (1998)
Munger Family Fund (2001)
Murchison/Silvia Charitable Gift Fund (2009)
Mystic Harmony Fund (2000)
Mystic River Watershed Environmental Fund (2011)
Paul F. Nagle Memorial Fund (2006)
Leslie & Sandra Nanberg Charitable Foundation Fund (2001)
Tami E. Nason & Kent A. Lage Fund (2005)
Jean F. and David G. Nathan Fund (1986)
New Beginnings/Kidder Fund (2004)
Next Door Fund (2005)
North Conway Institute Fund (2001)
Chad & Lia Novotny Fund (2002)
Kathryn Novotny Fund (2007)
Nicholas Novotny Fund (2007)
Novotny/Ramirez Donor Advised Fund (2002)
Novotny/Swahnberg Fund (1997)
Dupre-Nunnelly Charitable Gift Fund (2007)
O'Brien Family Fund (2006)
Ones Fund (2004)
Richard T. O'Rourke Fund (1988)
Orpheus Fund (2002)
Morgan Palmer Charitable Fund (1982)
John J. Pappenheimer Fund (1995)
Parker Family Fund (2000)
Field Parker Fund (1996)
Partnership Fund in honor of Anna Faith Jones (2001)
Payne's Creek Fund (2001)
Payson Family Fund (2000)
Perkins Grant Fund (1996)
Samuel Perkins and Nancy Reed Fund (1996)
Sheila and Sara Perkins Fund (1996)
Perkins Improvements Fund – William (1996)
John & Lydia Perkins Fund (1999)
Robert C. Perkins Fund (2000)
Thomas Perls Fund (2004)

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Donor Advised Funds continued

- Permanent Housing Fund (1989)
Roger Perry Memorial Fund (1999)
Peter Fund (2000)
Petersen Family Fund (2001)
Kevin Phelan Fund (2004)
Philancon Fund (1990)
Katherine A. & Fannie Phillips Fund (1997)
Picard Family Fund (2000)
Jamie Pierce & Rick Cresswell Fund (2002)
Plimpton – Shattuck Fund (2005)
Stephen and Sharon Plumeri Fund (1994)
Poler Family Charitable Gift Fund (2008)
Pool Family Fund (1997)
Poss-Kapor Family Fund (1996)
Pride in Scholarship Fund (1992) for scholarships to students whose academic work & individual contributions to the arts, sciences or business best serve & promote the gay & lesbian community
Fred & Ruthann Prifty Fund (2001)
Primary Care Progress Fund (2011)
Thomas & Mary Prince Family Fund (2000)
Project Shelter Pro-Am Fund (1991)
Sue and Bernie Pucker Fund (2002)
Donald and Frances Putnoi Charitable Fund (2006)
Peg Pyne Fund for Handicapped Access (1985) to make congregations accessible to handicapped worshipers
Quid Nunc Fund (2001)
Sidney R. & Esther V. Rabb Family Fund (1983)
Barbara & Yale Rabin Fund (2002)
Radtke Family Fund (1996)
Richard E. & Mary F. Rafferty Fund (2006)
Otto W. Ramstad Fund (1998)
Bessye Bedrick Ravelson Fund (2003)
Gene Record Fund (2002)
Sara Delano Redmond Fund (1996)
Remmer-Fox Family Fund (1995)
Reno Family Charitable Foundation (1998)
Edward S. Reynolds Memorial Fund (1984)
Riptide Fund (2002)
Jonathan Rizzo Memorial Foundation Fund (2001)
Thomas Roberts Fund (1995)
Roberts-Belove Fund (2004)
Brian D. Robertson Foundation Fund (2012)
Robynhood Thanksgiving Fund (2002)
Rosedune Fund (1970) especially for educational and cultural programs, primarily for children
Rosen Family Fund (2008)
Lindsey A. Rosen Fund (2011)
Daniel and Brooke Roth Charitable Gift Fund (2007)
Rotman-Attardo Family Fund (2005)
Dr. Jordan S. Ruboy Charitable Fund (1998)
Rust Bowl Fund (1987) for the benefit of cultural arts, including theatre
Robert Sachs & Caroline Taggart Gift Fund (1998)
- Salmon Family Charitable Fund (2006)
David Salten Fund (2007)
Risha C. and Paul A. Samuelson Fund (1982)
Sands Family Fund (2011)
Kazanjian Sargeant Fund (1996)
Schawbel Family Fund (1995)
Margaret M. Schmidt and Kenneth J. Danila Fund (2004)
Schott Fund (1999)
Schumann Family Fund (2005)
Schwinn Family Charitable Foundation (2011)
Charles S. and Zena A. Scimeca Charitable Fund (2004)
Stephen Sears and John Lavryssen Fund (2009)
September Fund (2000)
Norman and Maryellen Sullivan Shachoy Fund (1997)
Shames/Egasti Fund (1991)
Shapiro/Fleishman Fund (1999)
Douglas Boyd Sharpe Donor Advised Fund (2006)
Shawkemo Fund (2000)
K.A. and P.R. Sherbrooke Family Fund (2007)
Sherman Family Foundation Fund (2005)
Jon Shevell Cancer Fund (2010) to make grants to qualified charitable organizations that are dedicated to the treatment, prevention, or research of cancer
Jon Shevell Children's Fund (2010) to make grants to qualified charitable programs that are serving orphans (defined as children and young people whose parents are deceased or unable to take care of them)
Jon Shevell Education Fund (2010) to make grants to qualified Jewish religious or educational organizations
Shields Family Fund (2006)
William U. & J.W. Shipley Fund (2001)
Shoe Box Foundation Fund (2004)
Jean Karpas Siegel Fund (1994)
John and Susan Simon Boston Foundation Fund (2007)
Ellen L. Simons Fund (1997)
Sixty-Nine Roses Charitable Foundation (2011)
Fay Slover Fund (2010)
Skylight Fund (2000)
Ellin Smalley Fund (1987)
Smith Family Charitable Fund (2004)
Austin & Susan Smith Fund (1999)
Timothy Smith Fund (1995)
Julian & Anita Smith Fund (1981)
J. Alper Smith Fund (1996)
Clark R. and Trina H. Smith Family Fund (1990)
Nancy and George Soule Family Fund (1997)
Sparky Foundation Fund (2003)
Spector Fund (2001)
Spirit Triumph Corporation and Cheryl Ferrara Foundation Fund (2007)
Scott E. Squillace & Shawn M. Hartman Donor Advised Fund (2008)
David F. Squire Family Fund (1997)
Staufenbiel Aley Fund (2009)
Harvey & Shirley Stein Fund (1999)
Stewart Fund (2006)
Tracy Stewart Fund (2009)
Elihu and Lillian Stone Family Charitable Fund (2003)
James M. and Cathleen D. Stone Foundation (1995)

Stonehill Enrichment Fund of the Ames Free Library (1994)	Benjamin J. Williams, Jr. Fund (1986)
Robert Strange Family Fund (2003)	Hope A. Williams Fund (1986)
Charles Sugnet Fund (1998)	Natica R. Williams Fund (1986)
Joshua Sugnet Fund (1998)	Ralph B. & Margaret C. Williams Fund (1985)
Suhrbier Family Fund (2005)	Ralph B. Williams, II Fund (1986)
Nancy L. Sullivan Fund (1989)	Winkler Family Foundation Fund (2001)
Diane Sullivan-Villano Fund (1998)	Owen Thomas Winship Fund (1998)
Sunrise Fund (1993)	Samuel Lee Winship Fund (1998)
Sykes Moyer Fund (2005)	Wesley L. Winship Fund (1998)
Sylvan Fund (1985)	Jesse Winship-Freyer Fund (1998)
Davis & John I. Taylor Trust Fund (1983)	Winsor Foundation Fund (1989)
TechFoundation Fund (2002)	Jack & Judith Wittenberg Fund (1997)
Tempero Family Fund (2002)	William W. Wolbach Fund (1986)
Marc C. Thompson Family Fund (2008)	Howard L. Wolf Memorial Fund (1981)
Thomsen Family Fund (2000)	Women's Fund (1982)
Susan and Michael Thonis Fund (2005)	Karin E. Wood Fund (1993)
Thorvale Fund (2007)	Michael N. Wood Fund (1996)
ThreeBees Fund (2012)	Fund for World Class Schools (2007)
Scott and Jennifer Tobin Charitable Fund (2004)	Wyett Family Fund (1988)
Topol Family Fund (1991)	Zabin Charitable Fund (2001)
Norman E. & Sandra Curry Toy Fund (1985)	Sylvia and Robert Zell Fund (1988)
Trefler Fund (1997)	Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals
Tye Charitable Fund (2006)	T. Zouikin Charitable Fund (2003)
Unity Foundation Fund (1995) for funding of nonprofit organizations serving the African-American community	Zug Family Fund (2008)
Lisa and Bill Vanderweil Charitable Fund (2010)	
Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter	
Nancy J. Vickers Fund (2006)	
Vizzini Fund (1997)	
M. Volpe Kluchman Fund (2005)	
Ann & Robert von der Lippe Fund (1997)	
JH & EV Wade Fund (1990)	
James and Margaret Wade Fund (1997)	Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the communities of Harvard, Ayer, Groton, Pepperell, Shirley and Townsend
S & D Walden Charitable Fund (1986)	
Walker Fund (1998)	Deshpande Foundation (2007)
Walsh Brothers Foundation (2010)	Horace Moses Foundation (1995) to support Junior Achievement
Ruth & Henry Walter Fund I (2010)	James M. and Cathleen D. Stone Foundation (1994)
Ruth & Henry Walter Fund II (2010)	
Ruth & Henry Walter Fund III (2010)	
Ruth & Henry Walter Fund IV (2010)	
J. H. Walton Family Fund (1986)	
Max Warburg Fund (1992)	
John William Ward Fund (1987)	
Warner Charitable Gift Fund (2000)	
Joseph D. Warren Fund (2010)	
Wasserman Fund (Terminated Fund) (1986)	
Waterfield Fund (2002)	
Mimi Chandler Watt Fund (2008)	
Anita Barker Weeks Charitable Gift Fund (2011)	
Weiss Charitable Fund (2004)	
Wellesley Hills Congregational Church Outreach Fund (2007)	
Janet White Memorial Scholarship Fund (2004)	
Whitehead – Sayare Fund (2008)	
Guy and Maggie Wickwire Fund (1989)	

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