

## SELECTED Social Services GRANTS

A total of **\$9,150,600** in grants was made in the area of Social Services. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Disability Policy Consortium, Inc., \$50,000**

From the Edith M. Ashley Fund

*For the Consortium's constituent involvement and advocacy activities*

#### **Haitian Multi-Service Center, \$35,000**

\$15,000 from the Frederika Home Fund and \$20,000 from the Katherine Dexter Shelman Fund

*To support the Haitian Elders Program*

#### **Home for Little Wanderers, \$75,000**

From the Starr Foundation Fund

*For support of the Transition to Independent Living Task Force to examine issues facing youth leaving the care of the state*

#### **Massachusetts Society for the Prevention of Cruelty to Children, \$30,000**

From the Louis Agassiz Shaw Fund

*For evaluation of the Connecting Families program which aims to prevent child abuse and neglect*

### *Grants from Designated Funds*

#### **American Red Cross of Massachusetts Bay, \$5,949**

From the Dana P. and Maude E. Simpson Memorial Fund

#### **Crittenton Hastings House, \$14,240**

From the James F. Casey Fund

#### **Home for Little Wanderers, Inc., \$10,752**

From the Harry D. Neary Fund

#### **Rosie's Place, Inc., \$25,000**

From the Willis Munro Fund

### *Grants from Donor Advised Funds*

#### **Big Brothers of Massachusetts Bay, \$26,000**

From the Carol and Howard Anderson Fund

#### **Julie's Family Learning Program, Inc., \$50,000**

From the Albert J. & Diane E. Kaneb Family Fund II

#### **Open Door Cape Ann Food Pantry, Inc., \$25,000**

From the Gilbert H. Hood Family Fund

#### **Samaritans, Inc., \$10,000**

From the Atlantic Fund



## SELECTED Health GRANTS

A total of **\$4,554,183** in grants was made in the area of Health. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Boston Public Health Commission, \$50,000**

From the TBF Community Fund

*For support of the Neighborhood Treatment and Prevention Coalitions*

#### **Health Law Advocates, Inc., \$40,000**

From the TBF Community Fund

*For support of the Children's Mental Health Parity Project*

#### **Joseph M. Smith Community Health Center, \$25,000**

From the Harriet M. Bartlett Fund

*To establish an Outreach Department targeted at Latino and Haitian immigrants*

#### **Massachusetts Coalition of School-Based Health Centers, \$35,000**

\$33,200 from the TBF Community Fund and \$1,800 from

the Janet S. & George T.B. Perkins Fund

*To strengthen the Coalition's administrative operations*



### *Grants from Designated Funds*

#### **Beth Israel Deaconess Medical Center, \$22,654**

From the Primary Care Fellowship Program Fund

#### **Caritas Good Samaritan Medical Center, \$28,479**

From the James F. Casey Fund

#### **Massachusetts Eye and Ear Infirmary, \$2,343**

From the Stetson Whitcher Fund

#### **Metrowest Community Health Care Foundation, \$36,107**

From the Charles and Cornelia Pfaff Fund

### *Grants from Donor Advised Funds*

#### **Children's Hospital Corporation, \$100,000**

From the James and Margaret Wade Fund

#### **Fund for Neurologic Diseases, \$10,000**

From the Corvelli Fund

#### **Harborlight Dental Clinic, \$56,000**

From the Philancon Fund

#### **Riverside Community Mental Health and Retardation Center, \$10,000**

From the Stone Charitable Fund

## SELECTED Education GRANTS

A total of **\$17,733,713** in grants was made in the area of Education. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Center for Collaborative Education, \$125,000**

\$110,000 from the Theodore C. Hollander Trust Fund and

\$15,000 from the Edith M. Ashley Fund

*To provide technical assistance and other support to Boston Pilot Schools and to research the performance of Pilot Schools*

#### **Efficacy Institute, Inc., \$100,000**

\$86,000 from the TBF Community Fund, \$9,200 from the Janet S. & George T.B.

Perkins Fund, and \$4,800 from the David R. Pokross Fund for Children in Need

*To begin a Boston Campaign for Proficiency in Cluster Seven of the Boston Public Schools*

#### **Mass Insight Education and Research Institute, \$50,000**

From the J.E. Adrien Blais Fund I

*For the Great Schools Campaign*

#### **Rennie Center for Educational Research & Policy, \$50,000**

From the TBF Community Fund

*For the Transforming Labor Management Relations in Education Program*

### *Grants from Designated Funds*

#### **Hingham High School, \$1,663**

From the Douglas A. Eaton Memorial Fund

#### **Perkins School for the Blind, \$14,503**

From the Rae and Aaron Alberts Foundation Fund

#### **Phillips Academy, \$1,000**

From the George and Judy Webb Fund

#### **St. Coletta and Cardinal Cushing Schools of Massachusetts, Inc., \$196,182**

From the John S. McCann Fund

### *Grants from Donor Advised Funds*

#### **All Newton Music School, Inc., \$16,000**

From the Field Parker Fund

#### **Boston Center for Adult Education, \$40,000**

From the Dr. Jordan S. Ruboy Charitable Fund

#### **EdVestors, \$27,500**

Paid to the Boston Foundation from the RETQ Fund

#### **Suffolk University, \$15,000**

From the Sydell and Edward I. Masterman Fund



## SELECTED Cultural Institutions, Arts and Humanities GRANTS

A total of **\$6,093,034** in grants was made in the area of Cultural Institutions, Arts and Humanities.

Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Arsenal Center for the Arts, \$50,000**

\$46,000 from the Stephen & Sybil Stone Arts Fund and

\$4,000 from the TBF Community Fund

*To plan and launch programming at the Arsenal Center for the Arts in Watertown*

#### **First Night, Inc., \$100,000**

From the TBF Community Fund

*For implementation of a new business plan*

#### **Massachusetts Advocates for Arts, Sciences and Humanities, \$50,000**

From the TBF Community Fund

*For implementation of a new strategic plan*

#### **Zoo New England, \$60,000**

From the TBF Community Fund

*To launch a comprehensive strategic planning process*

### *Grants from Designated Funds*

#### **Boston Symphony Orchestra, \$78,655**

From the Miriam and Sidney Stoneman Fund

#### **Children's Museum, \$70,764**

From the Michael Spock Community Service Fund

#### **Easton Historical Society, \$10,000**

From the Robert D. and Sally G. King Fund

#### **Watertown Free Public Library, \$28,386**

From the Charles T. Burke Fund for the Watertown Free Public Library



### *Grants from Donor Advised Funds*

#### **Arts and Cultural Alliance of Newport County, Inc., \$5,000**

From the Dainger Fund

#### **Boston Ballet, Inc., \$50,000**

From the Jonas Family Fund

#### **Coolidge Corner Theatre Fund, \$35,000**

From the Golden Family Fund

#### **Featherstone Center for the Arts Inc., \$30,000**

From the M.R. Kidder Charitable Fund

## SELECTED Conservation/Environment GRANTS

A total of **\$2,423,068** in grants was made in the area of Conservation/Environment. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Charles River Conservancy, Inc., \$20,000**

From the TBF Community Fund

*For a Service Learning Coordinator to facilitate use of the Charles River Basin for after-school and school-based programs*

#### **Crittenton Hastings House, \$40,000**

\$38,800 from the TBF Community Fund and \$1,200 from the Norman Everett Pearl Fund

*For staff and community involvement costs associated with planning for Crittenton Woods*

#### **Museum of Afro-American History, Inc., \$50,000**

From the TBF Community Fund

*For preparation for the Abolitionist Exposition in 2005 and the Museum's Bicentennial Celebration in 2006*



#### **Trust for Public Land, New England, \$25,000**

From the TBF Community Fund

*For the Greener Boston project*

### *Grants from Designated Funds*

#### **Capen Hill Nature Sanctuary, \$12,319**

From the Gaywest Farm Fund

#### **Natural Resources Trust of Easton, \$157,796**

From the Sheep Pasture Fund

#### **Minnechaug Land Trust, \$2,000**

From the Herbert Farnsworth Fund

#### **Essex County Greenbelt Association, Inc., \$30,648**

From the Allyn Cox Fund for Essex County Greenbelt

### *Grants from Donor Advised Funds*

#### **Conservation Law Foundation, \$25,000**

From the Butler's Hole Fund

#### **Friends of the Public Garden, \$16,667**

From the LMG Fund

#### **Massachusetts Audubon Society, Inc., \$3,000**

From the Morgan Palmer Charitable Fund

#### **Trustees of the Reservations, \$6,000**

From the Walter A. & Hope Noyes Smith Fund

## SELECTED Community Development GRANTS

A total of **\$4,643,218** in grants was made in the area of Community Development. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Conservation Law Foundation, \$50,000**

From the TBF Community Fund

*For the Greater Boston Institute, which promotes inclusive and environmentally sensitive development, open space, housing and transportation planning in Boston*

#### **Massachusetts Association of Community Development Corporations, \$40,000**

From the TBF Community Fund

*For a public education and advocacy campaign to expand resources for affordable housing.*

#### **Covenant Housing Initiative, \$50,000**

\$25,000 from the TBF Community Fund, \$10,000 from the Harry L. Nason Fund, and \$15,000 from the Katherine Dexter Shelman Fund

*To support infrastructure building for the Initiative*



#### **Chinese Progressive Association, \$125,000**

From the TBF Community Fund

*For its Campaign to Protect Chinatown*

### *Grants from Designated Funds*

#### **Community Resources for Justice, \$26,181**

From the Gertrude Hooper Fund

#### **Homes for Families, Inc., \$75,000**

From the Starr Foundation Fund

#### **Roxbury Multi-Service Center, \$5,134**

From the Ruby C. Emerson Fund

#### **Urban Edge, \$22,500**

From the Home Funders Fund

### *Grants from Donor Advised Funds*

#### **Allston-Brighton Community Development Corporation, \$50,000**

From the Microsoft Unlimited Potential Fund

#### **Center for Teen Empowerment, \$80,000**

From the Trefler Fund

#### **Greater Lawrence Habitat for Humanity, \$3,000**

From the Skylight Fund

#### **Housing Opportunities for Women, \$30,000**

From the J. Jill Compassion Fund

## SELECTED Civic Affairs GRANTS

A total of **\$2,173,546** in grants was made in the area of Civic Affairs. Here is a brief representative sampling from the three different types of funds.

### *Grants from Discretionary Funds*

#### **Commonwealth Legislative Seminar and Network, \$45,000**

\$40,500 from the TBF Community Fund, \$3,300 from the Katherine C. Wheeler Fund, and \$1,200 from the Massachusetts Civic League Fund

*To support efforts to train leaders of communities of color to become effective advocates on relevant issues and develop working relationships with policymakers*

#### **Massachusetts Immigrant and Refugee Advocacy Coalition, Inc., \$75,000**

From the TBF Community Fund

*For its advocacy activities designed to build a strong and informed constituency for issues that confront immigrant and refugee communities in the state*

#### **Massachusetts Voter Education Network, Inc., \$25,000**

From the TBF Community Fund

*To engage nonprofit organizations in Lynn and Somerville in voter education activities based on the Boston VOTE model*

#### **TransitWorks, \$50,000**

From the TBF Community Fund

*For expansion of activities designed to help the Massachusetts Bay Transportation Authority (MBTA) retain and renew relationships with the riding public*

### *Grants from Designated Funds*

#### **Andover Village Improvement Society, \$5,000**

From the Bessie P. Goldsmith Fund

#### **Massachusetts Affordable Housing Alliance, Inc., \$10,000**

From the Civic Engagement Project Fund

#### **Massachusetts Association of Community Organizations for Reform Now, \$30,000**

From the Civic Engagement Project Fund

#### **Social Law Library, \$73,985**

From the Social Law Library Endowment Fund

### *Grants from Donor Advised Funds*

#### **Amnesty International of USA, Inc., \$5,000**

From the Rust Bowl Fund

#### **Anti-Defamation League of B'nai B'rith, \$10,000**

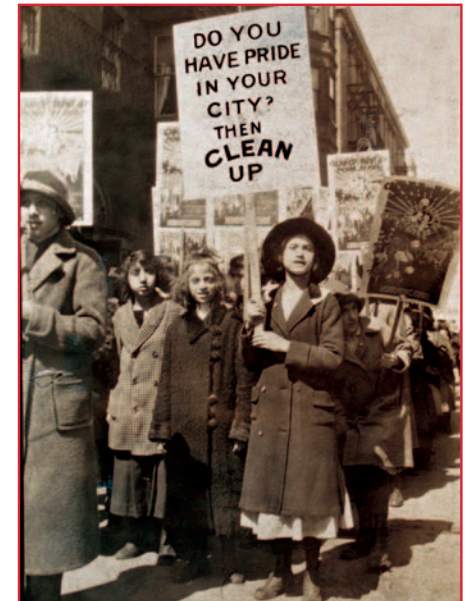
From the David G. Mugar Fund

#### **National Conference for Community and Justice, \$15,000**

From the Rodgers Community Fund

#### **Robert F. Kennedy Children's Action Center, \$5,500**

From the Mayel Fund



## SELECTED Special Initiatives GRANTS

The Boston Foundation plays a leadership role in developing focused initiatives in key areas of civic life where intensive involvement has the potential for significant impact. On these pages are brief descriptions of the initiatives and a brief representative sampling of the grants from them.



### The Civic Engagement/Voter Participation Initiative

This initiative was established by the Boston Foundation and supported by several foundations. It is specifically focused on increasing voter turnout in low-income neighborhoods where voter participation has been historically low. Phase One of this three-year nonpartisan voter participating effort raised \$1 million and ended in the spring of 2005. Based on its success, the funders decided to launch Phase Two and have raised \$1.7 million for the second phase, which will be managed by the Massachusetts Voter Education Network. In 2005, grants of \$105,000 went to the following groups for Phase Two:

**Boston Tenant Coalition**

**Chelsea Human Services Collaborative**

**Chinese Progressive Association**

**Dudley Street Neighborhood Initiative**

**Fenway Community Development Corporation**

**Hyde Square Task Force**

**Massachusetts Affordable Housing Alliance**

**Massachusetts Association of Community Organizations for Reform Now**

### Community Safety Initiative

This three-year, \$1.5 million initiative, which came to a close in Spring 2005, sought to revitalize and strengthen successful community safety efforts focused on addressing immediate and systemic issues around rising crime in Boston. In addition to its grantmaking this year the Foundation also hosted a forum with the Crime and Justice Institute to discuss the Criminal Offender Record Information (CORI) system.

The forum drew over 200 people and addressed potential strategies to respond to the major challenges of the system. All of the grants made through this initiative are from the Community Safety Fund unless otherwise stated. Here is a sampling of grants made this year:

**Black Ministerial Alliance of Greater Boston, Inc. \$20,000**

*To support the engagement and coordination of pastors in anti-violence work*

**Boston Ten Point Coalition, Inc., \$65,000**

*For support of capacity building and organizational development efforts*

**Boys and Girls Clubs of Boston, Inc. \$10,000**

*To support efforts to keep clubhouses open weeknights until 9:00 pm from August 16 through September 3, 2004*

**Harvard University John F. Kennedy School of Government, \$50,000**

*For support of the Research Partnership to Prevent Serious Violence in Boston*

**Roxbury Youthworks, Inc. \$25,000**

For support of the Female Focus Initiative

## Fund for the Environment

The Fund for the Environment operates the New England Wildlife Grants Program. Priorities include land conservation, land stewardship, education and outreach, and preservation of flora and wild birds. The following are selected grants from the Fund's Discretionary Funds. See page 39 for selected grants from Designated Funds.

**Cape Cod Museum of Natural History, Inc., \$4,800**

*To enhance flora for songbirds on conservation land in the Stony Brook Valley, Brewster*

**Coalition for Buzzards Bay, Inc., \$5,000**

*For support of the Nulands Neck Project*

**Green Mountain Conservation Group, \$5,000**

*For support of the Trout Pond Conservation Project*

**The Lobster Conservancy, \$5,000**

*For support of the Juvenile Lobster Monitoring Program*

**Orleans Conservation Trust, \$5,000**

*For support of the Sarah's Pond and Meadow Pond Bog Land Project*

## The Homelessness Prevention Initiative

This is an effort to champion the cost-effective strategy of preventing of homelessness, by demonstrating the most effective strategies that will keep families and individuals stable in their housing through addressing the wide variety of circumstances that can place them at risk, such as domestic violence, mental illness and substance abuse, or unexpected financial reversals. With its partners—Tufts Health Plan, the Massachusetts Medical Society and Alliance Charitable Foundation, and the Starr Foundation—grants totaling \$1,060,000 were made to 19 organizations. Here are some selected grants:

**Bridge Over Troubled Waters, \$45,000**

*For the Transitional Day Program to prevent homelessness among high-risk youth*

**Family to Family, \$40,000**

*For the Homelessness Prevention Partnership, a collaborative of six agencies*

**Massachusetts Coalition for the Homeless, \$75,000**

*For the First Stop Initiative*

**Rosie's Place, \$60,000**

*For the Non-Residential Support Service Program*

**Victory Programs, \$52,000**

*For the Homelessness Prevention Program*

## The New Economy Initiative

This five-year program is designed to increase digital equity for young people and adults in our community and enable them to succeed in the new economy. The initiative also builds the technology capacity of nonprofit organizations in the area. All of these grants came from the New Economy initiative Fund unless otherwise stated. Here are selected grants from 2005:

### **Health Care For All, \$50,000**

*For Massachusetts RealBenefits, an internet-based eligibility and application tool for public benefits to low-income families*

### **Massachusetts Immigrant and Refugee Advocacy Coalition, \$40,000**

*For Speakeasy: a real-time telephone-based interpretation system that links volunteers to those needing interpretation services*

### **Museum of Science, \$25,000**

*For a study on a Wireless Boston strategy*

### **South End Technology Center @ Tent City, \$40,000**

*For the Teach 2Learn-Learn2Teach program for 48 high school students*

### **Timothy Smith Network, \$40,000**

*For a long-term sustainability plan for a network of 40 community technology centers in Roxbury*

## Pilot School Initiative

This initiative is designed to support Boston public schools interested in exploring the Pilot school model. Like charter schools, Pilot schools have flexibility in hiring, scheduling, work rules and budgeting. In FY2005 the Foundation made three additional implementation grants to each of the following schools:

### **Baldwin Early Learning Center**

### **Lee Academy Pilot School**

### **Samuel W. Mason Elementary School**

## SkillWorks

SkillWorks is the single largest public/private investment in workforce development in Boston's history. SkillWorks seeks to change the way employers hire and promote entry-level workers from Boston's neighborhoods by encouraging employer-driven partnerships with community training organizations. Funding partners include the City of Boston, the Commonwealth of Massachusetts and other local and national funders. These grants were made in 2005:

### **Asian American Civic Association, \$330,000**

### **International Institute of Boston, \$330,000**

### **Jamaica Plain Neighborhood Development Corporation, \$330,000**

### **Management Consulting Services, \$75,000**

### **Partners HealthCare, \$330,000**

### **Voice and Future Fund, \$330,000**

### **The Women's Union, \$330,000**

## Out of the Blue Grants

This special program makes unsolicited, unrestricted grants of \$75,000 to nonprofit organizations that have strong leadership, and engage in outstanding work. The goal is to advance priority work in sectors of major interest to the Boston Foundation and to provide timely support to highly effective organizations. All of these grants were from the TBF Community Fund. This year's recipients were:

### **Building Educated Leaders for Life (BELL)**

### **Committee to End Elder Homelessness, Inc.**

### **Greater Boston Legal Services, Inc.**

### **Madison Park Development Corporation—ACT Roxbury Consortium**

# Boston Foundation Advisory Groups

In the Boston Foundation's continuing campaign to bring new voices and community expertise to its work, a number of special task forces and committees inform our work in the areas of arts and culture, community safety, education, the environment, health care, housing and economic development, homelessness prevention, the new economy, and workforce development. The Boston Indicators Project also has a leadership group that guides its work and progress.

These groups vary in size and mission, but not in importance. As of the printing of this report, the following people were engaged in advising our work.

We are grateful for their commitment of time, their experience, and their wisdom.

## Arts & Culture Policy Advisory Committee

Louis Casagrande, President, The Boston Children's Museum, *Committee Chair*

Jon Abbott, Executive Vice President, WGBH

Paul Bittenwieser, MD, Psychiatrist; Novelist; Trustee, Boston Symphony Orchestra, Institute of Contemporary Art, and Museum of Fine Arts, Boston

Barbara Casey, Managing Director, Mellon Private Wealth Management; Trustee, Hyams Foundation

Kathleen Cerveny, Senior Program Officer, The Cleveland Foundation

Jim Darr, Senior Fellow, Boston Foundation

George Fifield, Executive Director, Boston Cyberarts

Paul Grogan, President & CEO, The Boston Foundation

Susan Hartnett, Director, Mayor's Office of Arts, Tourism & Special Events

Martha Jones, President & Executive Director, Bank of America Celebrity Series

Mary Kelley, Executive Director, Massachusetts Cultural Council

Jeremy Liu, Executive Director, Asian Community Development Corporation

Michael Maso, Managing Director, Huntington Theatre Company

Charlie McDermott, Deputy Director, Massachusetts Cultural Council

Ann McQueen, Senior Program Officer, The Boston Foundation

Jill Medvedow, James Sachs Plaut Director, Institute of Contemporary Art

Samuel Miller, President, Leveraging Investments in Creativity (LINC)

Margaret H. Morton, Senior Vice President-Program, the Fidelity Foundations

Jeffrey Poulos, Executive Director, StageSource

Gil Rose, Artistic Director, Boston Modern Orchestra Project

J. Mark Schuster, Professor, Department of Urban Studies and Planning at MIT

Klare Shaw, Senior Associate, Barr Foundation

Holly Sidford, Consultant, Leveraging Investments in Creativity (LINC)

Candelaria Silva, Director, ACT Roxbury Consortium

Katherine Sloan, President, Massachusetts College of Art

Edmund Toomey, Chief Operating Officer, Lesley University

Clara Wainwright, Artist/Producer, Faith Quilts Project

## Community Safety Advisory Committee

Frank Hartmann, Executive Director and Senior Research Fellow, Program in Criminal Justice, *Committee Chair*

Cathleen Bennett, Director of Training, Committee for Public Counsel Services

Pat Bradley, Assistant Secretary, Executive Office of Public Safety

Angela Browne, Adjunct Lecturer, Department of Health Policy and Management, Harvard School of Public Health

Christine Coles, Chief of Staff, Executive Office of Public Safety

Shirley Fan, Executive Director, Asian Task Force Against Domestic Violence, Inc.

Robert Gittens, Vice President of Public Affairs, Northeastern University

Rev. Ray Hammond, Pastor, Bethel AME Church, Boston Foundation Board Chair

Scott Harshbarger, Former Massachusetts Attorney General, Head of Harshbarger Governance Practice, Murphy, Hesse, Toomey & Lehane, LLP

Frank Hartmann, Executive Director, Criminal Justice Policy and Management, John F. Kennedy School, Harvard University

Michael Kozu, Community Coordinator, Project R.I.G.H.T

Tracy Lithcut, Senior Coordinator, Office of High School Renewal

Doug Lomax, Substance Abuse Coordinator, Boston Municipal Court  
Jennifer Machonochie, Director, Office of Strategic Planning and Resource Development,  
Boston Police Department  
Ralph Martin III, Former District Attorney, Suffolk County and Partner,  
Bingham McCutchen LLP  
Jack McDevitt, Director, Center for Criminal Justice Policy Research, Northeastern  
University  
Gloria Cross Mwase, Coordinator, Making Connections, Annie E. Casey Foundation  
Kathleen O'Toole, Commissioner, Boston Police Department  
Rev. Eugene F. Rivers III, Chairman, National Ten Point Leadership Foundation  
Willie Rodriguez, Executive Director, La Alianza Hispana, Inc.  
Milton L. Wright, Jr., Presiding Justice, Roxbury District Court

### **Education Advisory Committee**

James Darr, Senior Fellow, The Boston Foundation, *Committee Chair*  
Carol Anderson, Boston Foundation Board Member  
William Boyan, Former President and COO, John Hancock Financial Services;  
member, Boston School Committee  
Linda Brown, Executive Director, Building Excellent Schools  
Chris Coxon, Deputy Superintendent, Teaching and Learning, Boston Public Schools  
Donald Davies, Professor Emeritus of Education, Boston University  
Charles Desmond, M.D., Associate Vice Chair for Schools and Collaboration,  
University of Massachusetts Boston, Graduate College of Education  
Ellen Guiney, Executive Director, The Boston Plan for Excellence  
Marc Kenen, Mass Charter School Association  
Karen Mapp, Deputy Superintendent for Family and Community Engagement,  
Boston Public Schools  
Claudio Martinez, Executive Director, Hyde Square Task Force  
Kenneth Novack, Of Counsel, Mintz Levin Cohn, Ferris, Glovsky and Popeo  
James Peyser, Chairman, Massachusetts Board of Education  
Jacqueline Rivers, Executive Director, Math Power  
Robert Schwartz, Harvard Graduate School of Education  
Klare Shaw, Senior Associate, The Barr Foundation  
Pamela Trefler, President, Trefler Foundation  
Miren Uriarte, M.D., Research Associate Gaston Institute, UMass Boston

### **Fund for the Environment Advisory Committee**

Jennifer Bender Ferre, Board Member, New England Aquarium  
Trudy Coxe, Chief Executive Officer, Preservation Society of Newport County  
Alan French, Chairman, Bay Circuit Alliance  
Kate Guedj, Vice President for Philanthropic & Donor Services, The Boston Foundation  
Kathryn Kilguss, Past President of the Board, Save the Bay  
Binkley C. Shorts, Senior Vice President, Wellington Management Company, LLP  
Freda Swan, Advisory Council, Upper Valley Land Trust  
Gregg H. Swanzey, Executive Director, Schooner Ernestina Commission  
Emily V. Wade, President, Museum Institute for Teaching Sciences  
Alan Wilson, Past Vice President, CLF Ventures, Conservation Law Foundation

### **Health Care Advisory Committee**

Jackie Jenkins-Scott, President, Wheelock College, *Committee Co-Chair*  
Malcolm Sherman, Chairman, Gordon Brothers Group, *Committee Co-Chair*  
Stuart Altman, Professor of National Health Policy, Brandeis University  
Hortensia Amaro, Ph.D., Director, Institute on Urban Health, Northeastern University  
John Auerbach, Executive Director, Boston Public Health Commission  
Harris Berman, M.D., Dean, Public Health and Professional Degree Programs,  
Tufts University School of Medicine  
Elizabeth Childs, M.D., Commissioner, MA Department of Mental Health  
Lula Christopher, Executive Director, Boston Black Women's Health Institute  
James Hunt, President & CEO, MA League of Community Health Centers  
Peter Koutoujian, Representative and Chair, Healthcare Committee, MA House of  
Representatives  
James Mandell, M.D., President and CEO, Children's Hospital  
John McDonough, Executive Director, Health Care for All  
Joyce Murphy, President, Caritas Carney Hospital  
David Nathan, M.D., President Emeritus, Dana Farber Cancer Institute  
Deborah Prothrow-Stith, M.D., Associate Dean, Harvard School of Public Health  
Valerie Sullivan, Director of Marketing, Pfizer Pharmaceuticals Group  
Judy Swahnberg, Board Member, Kenneth B. Schwartz Center  
Jacob Smith Yang, Executive Director, MA Asians and Pacific Islanders for Health  
Azzie Young, Ph.D., Executive Director, Mattapan Community Health Center

## Homelessness Prevention Advisory Committee

Cindy Rizzo, Senior Program Officer, The Boston Foundation, *Committee Chair*

Robyn Alie, Manager, Massachusetts Medical Society and Alliance Charitable Foundation

Susanne Beaton, One Family Campaign Director, One Family, Inc.

Ed Sanders-Bey, Assistant Commissioner, Massachusetts Department of Transitional Assistance

Carol Collins, Director of Housing Management, Massachusetts Department of Housing and Community Development

Jennifer Day, Manager, Massachusetts Medical Society and Alliance Charitable Foundation

Elizabeth Doyle, Assistant Director for Housing Development, Department of Neighborhood Development, City of Boston

Joseph Finn, Executive Director, Massachusetts Housing and Shelter Alliance

Donna Haig Friedman, Ph.D., Director, Center for Social Policy Research, University of Massachusetts Boston

Robyn Frost, Executive Director, Massachusetts Coalition for the Homeless

James Greene, Shelter Commissioner, City of Boston

Julia Kehoe, Executive Director, Metropolitan Boston Housing Partnership

Anne Marie Boursiquot King, Manager, Community Partnerships and Volunteerism, Tufts Health Plan

Margaret Leonard, Executive Director, Project Hope

Paul Nixon, Housing Management Specialist, Massachusetts Department of Housing and Community Development

Alison Rice, Director of Family Housing Services, Housing Assistance Corporation

Marc Slotnick, Associate Director, Public Housing and Rental Assistance, Massachusetts Department of Housing and Community Development

Toni Abrams Weintraub, M.D., Assistant Medical Director, Tufts Health Plan

## Housing and Economic Development Advisory Committee

Eleanor White, President, Housing Partners, Inc., *Committee Chair*

Amy Anthony, President, Housing Investments Inc.

Barbara Berke, Consultant

Barry Bluestone, Director, The Center for Urban and Regional Policy, Northeastern University

Rachel Bratt, Professor, Department of Urban and Environmental Policy and Planning, Tufts University

Eva Clarke, Executive Director, Mattapan Community Development Corporation

Larry Curtis, Managing Partner, Winn Development

Aaron Gornstein, Executive Director, Citizens Housing & Planning Association

Albert J. Kaneb, Chairman and CEO, Barnstable Broadcasting, Inc.

Mossick Hacobian, Executive Director, Urban Edge Development Corporation

Sandra Henriquez, Director, Boston Housing Authority

Langley Keyes, Professor of City and Regional Planning, Department of Urban Studies, MIT

Joe Kriesburg, President, Massachusetts Association of Community Development Corporations

Robert H. Kuehn, Jr., President, Keen Development Corporation

Alvaro Lima, Director of Research, Boston Redevelopment Authority

Joanne Massaro, Director of Operations, Department of Neighborhood Development, City of Boston

Nelson Merced, Director of National Initiatives, NeighborWorks

Jeanne Pinado, Executive Director, Madison Park Community Development Corporation

Stephanie Pollack, Consultant

Robert L. Pyne, Director of Rental Development, MassHousing

David Squire, Vice Chair, MassDevelopment

Matt Thall, Senior Program Director, Local Initiatives Support Corporation

Sarah Young, Deputy Director for Policy Development, Department of Housing and Community Development

## The New Economy Initiative Steering Committee

Geeta Pradhan, Program Director, The Boston Foundation, *Committee Chair*

David Altshuler, Founder and CEO, TechFoundation

Professor Nolan Bowie, Adjunct Lecturer in Public Policy, John F. Kennedy School of Government, Harvard University

Holly M. Carter, Ph.D., Director, Community Technology Centers Network

Cathleen Finn, Community Relations Program Manager, IBM

Jonathan Guerster, Principal, Offshore View

Deborah C. Jackson, CEO, American Red Cross of Massachusetts Bay

Alice Jelin, Executive Director, Massachusetts Software Council Education Foundation

Lewis Karabatsos, Director, U.S. Strategy and Operations, Hewlett-Packard Company

Cesar McDowell, Director, Center for Reflective Community Practice, M.I.T.

Marc Osten, Principal, Summit Collaborative Partners

Mary Rafferty, Regional Director, Verizon Foundation

Carol J. Ramsey, Director, Corporate Relations, Raytheon Company

Gregory Sheldon, Chair, MTC Workforce Development Committee, Massachusetts Telecommunications Council

Neil Sullivan, Executive Director, Boston Private Industry Council

## **The SkillWorks Funders Group**

Angel H. Bermudez, Senior Director of Grantmaking and Special Projects,  
The Boston Foundation, *Committee Chair*

Henry Allen, Senior Program Officer, The Hyams Foundation

Ken Barnes, Deputy Director for Planning and Policy Development, Mayors' Office of Jobs  
and Community Services

Sue Beaton, Director, One Family Campaign/Fireman Foundation

Angela Brown, Program Officer, The Hyams Foundation

Annie Chin-Louie, Director, Community Investments, United Way of Massachusetts Bay

Gloria Cross Mwase, Local Site Coordinator, Annie E. Casey Foundation

Conny Doty, Executive Director, Mayor's Office of Jobs and Community Services

Sharon Driscoll, Vice President, Bank of America Private Bank

Christie Getto Young, Public Policy Manager, United Way of Massachusetts Bay

Carol Glazer, Consultant, The Rockefeller Foundation

Jennifer James, Director of Interagency Initiatives Department of Workforce Development,  
Commonwealth of Massachusetts

Melinda Marble, Executive Director, One Family Campaign/Fireman Foundation

Rowan Murphy, Program Consultant, The John Merck Fund

Dan Singleton, Deputy Director of Adult Services, Mayor's Office of Jobs and Community  
Services

## **The Boston Indicators Project Leadership Group**

Robert Gittens, Vice President, Public Affairs, Northeastern University, *Co-Chair*

Joyce Plotkin, President, Mass Technology Leadership Council, *Co-Chair*

Stephen Adams, Regional Advocate, Region I Office of Advocacy, U.S. Small Business  
Administration

Geoff Beckwith, Executive Director, Massachusetts Municipal Association

Margaret Blood, President, Strategies for Children, Incorporated

Barry Bluestone, Director, Center for Urban and Regional Policy, Northeastern University

Ian Bowles, Executive Director, MassINC

Valerie Burns, President, Boston Natural Areas Network

Maria Cheevers, Project Director, The Female Focus Initiative, Roxbury YouthWorks

John Ciccarelli, Assistant to the Chancellor for Economic Development, University of  
Massachusetts, Boston

Stephen Crosby, Publisher, Cable in the Classroom

Gloria Cross Mwase, Coordinator, Making Connections Boston, Annie E. Casey Foundation

Robert Culver, President, MassDevelopment

Curtis Davis, Senior Project Advisor, MetroFuture, Metropolitan Area Planning Council

Marc Draisen, Executive Director, Metropolitan Area Planning Council

Mary Fifield, President, Bunker Hill Community College

Paul Grogan, President and CEO, The Boston Foundation

Ronald Homer, President, Access Capital Strategies

Cheng Imm Tan, Director, Office of New Bostonians

Marion Kane, Executive Director, The Barr Foundation

Kathleen Kelley, President, Massachusetts Federation of Teachers

Terry Lane, Vice President for Program, The Boston Foundation

David Lee, Vice President, Stull & Lee, Incorporated

Vanessa Leong, Senior Community Relations Specialist, Raytheon Company

Vivien Li, Executive Director, Boston Harbor Association

Alvaro Lima, Director of Research, Boston Redevelopment Authority

David Luberoff, Executive Director, Rappaport Institute, John F. Kennedy School of  
Government, Harvard University

Melinda Marble, Executive Director, The Paul and Phyllis Fireman Charitable Foundation

Larry Mayes, Chief of Human Services, City of Boston

Peter Meade, Vice President, Corporate Affairs, Blue Cross/Blue Shield of Massachusetts

Mary Jo Meisner, Vice President for Community Relations, Communications and Public  
Affairs, The Boston Foundation

Keith Motley, Vice President for Business Affairs at the Office of the President,  
University of Massachusetts

Mary Ostrem, Director of Research, Boston Public Health Commission

Stephanie Pollack, Center for Urban and Regional Policy, Northeastern University

Tina Rice, Assistant Director, Corporate and Government Affairs, Carroll School of  
Management, Boston College

Arnold Rosoff, Founder, Arnold Worldwide

Lukas Ruecker, Vice President, US Strategy and Planning, Staples, Incorporated

John Schneider, Director, New Skills for a New Economy Awareness & Action Campaign,  
MassINC

Cathleen D. Stone, Special Assistant to the Mayor for Special Projects, City of Boston

William Walczak, Executive Director, Codman Square Health Center, Inc.

# Applying for a Grant



The Boston Foundation invests in nonprofit organizations in order to build a vibrant, cohesive and interconnected community that provides access to fundamental resources and opportunities for all citizens. Nonprofit organizations are essential partners in the task of creating a livable metropolitan area that is the center of new ideas and opportunity. Boston Foundation grants help them to generate and implement innovative projects, grow proven programs to significant scale, respond to changing times and circumstances, and address barriers to equal opportunity.

As a community foundation, the Foundation has a special responsibility to support a broad range of activities that strengthen the fabric of communities in Greater Boston. The Foundation supports organizations and programs working in a wide variety of subject areas that include: Arts & Culture; Civic Engagement; Education/Out-of-School Time; Health & Human Services; Housing & Community Economic Development; Urban Environment; and Workforce Development.

The Foundation makes grants from its Discretionary Funds on a semi-annual basis. Discretionary Funds are largely unrestricted, and allow the Boston Foundation the greatest degree of flexibility in grantmaking. They include the Community Fund (the largest unrestricted fund), Named Funds (established to honor a person or organization), and Field of Interest Funds, which focus on general areas of interest.

## *Who Can Apply?*

The Boston Foundation welcomes applications from organizations in the Greater Boston area that are tax exempt under section 501(c)(3) of the Internal Revenue Code. If a project is new and not yet tax exempt, an application may be submitted through a nonprofit organization that has agreed to serve as a fiscal agent.

## *Types of Grants*

Generally, the Boston Foundation makes the following types of grants:

Project or program support for community-based efforts that improve the quality of life in our community, test new models and promote collaborative and innovative ventures;

Organizational support to develop and build the capacity of nonprofit organizations; support that helps organizations keep pace with the changing requirements and demands of their communities and broader environments; and

Support for planning to enable organizations and residents to assess community needs, respond to new challenges and opportunities, and provide for the inclusion of new populations.

## *Guidelines and Deadlines*

- 🍷 The Boston Foundation has two proposal deadlines each year for grants from general Discretionary Funds.
- 🍷 The application process has two stages, requiring applicants to submit a Pre-Application Form about 10 weeks in advance of the proposal submission deadline. The Foundation will then invite full proposals from applicants whose work best advances TBF's priorities and goals.
- 🍷 The two deadlines for Pre-Application are July 1 and January 5.
- 🍷 The Foundation will invite submission of full proposals based on its review of the Pre-Application Form, but will not consider uninvited proposals.
- 🍷 The Foundation does not accept concept papers.

## *Special Initiatives*

The Foundation plays a leadership role in developing focused initiatives in key areas where more intensive involvement has the potential for significant impact. Initiative funding is announced through a Request for Proposal (RFP) process, and widely communicated to the community. Initiative information is always posted on the Foundation's website at [www.tbf.org](http://www.tbf.org).

## *For More Information Visit Our Website*

There is detailed grantmaking information on TBF's website, including the on-line Pre-Application Form. The website also contains information about higher and lower funding priorities in each of TBF's grantmaking sectors and priorities for specific populations. Those organizations interested in applying for funding are strongly encouraged to visit the website at [www.tbf.org](http://www.tbf.org), where extensive information is available about every aspect of TBF's grantmaking process. Interested organizations may also call the Foundation at 617-338-1700 for more information.

# Establishing a Fund

**B**oston Foundation donors want to make a real difference with their philanthropy, and they know that the Boston Foundation has the capacity to help them do just that. The Foundation offers a variety of fund options to meet donors' needs—from flexible funds that can be used to benefit Greater Boston to Donor Advised Funds that engage donors who want to be actively involved in their giving.

It's quick and easy to establish a fund at the Boston Foundation—even if gifts are complicated, such as gifts of restricted stock or real estate. And as the partnership with the Boston Foundation deepens, donors have access to some of the most exciting information and events about today's Greater Boston community.

## *Endowing Boston*

To benefit this community, now and for future generations, many donors choose to establish a charitable legacy that will carry their name and charitable interests in perpetuity. Donors can choose from three basic types of funds.

### **The Community Fund**

An unrestricted gift to Boston's primary endowment, the Community Fund, can be made with the knowledge it will always be applied to the most pressing community needs by a staff that is in close touch with the issues challenging Greater Boston.

### **Field of Interest Funds**

By establishing a Field of Interest Fund, donors can focus their gift on the area of community life that they care about most—such as promoting excellence in education for all children, addressing the health care needs of the most needy, or supporting arts and culture.

### **Designated Funds**

A Designated Fund allows donors to provide annual support to organizations in Greater Boston or across the United States that have made a difference in their lives and the lives of loved ones.

## *The Civic Leadership Fund at the Boston Foundation*

The Civic Leadership Fund fuels the 'beyond grantmaking' work of the Boston Foundation—including researching problems that are challenging Greater Boston, bringing people together to exchange information and ideas, encouraging cross-sector partnerships, and creating action plans for change in areas like affordable housing, workforce development, and education.

## *Donor Advised Funds*

Donor Advised Funds operate much like private foundations, but without the administrative burdens or paperwork. Donors are able to make contributions to nonprofit organizations anywhere in the United States—even internationally. And, for those who want some assistance with their giving, Boston Foundation donors have access to a knowledgeable and experienced staff that can help guide their giving as little or as much as they would like.

## *The Many Ways of Giving*

Donors can work with the Boston Foundation to maximize their financial opportunities for themselves, their heirs—and the charitable causes they care about most. The Boston Foundation offers a full range of ways of giving:

### **Cash Contributions**

Cash is the easiest way to establish a fund or add to an existing fund.

### **Gifts of Appreciated Assets**

Stocks and bonds, including restricted stock, pre-IPO stock, mutual funds, certain closely-held stock and readily marketable real estate—a wide variety of assets may be used to establish a fund, add to a fund or create a planned or legacy gift.

### **Assets from a Private Foundation**

A private foundation can make a grant to any fund at the Boston Foundation or transfer its assets to a Donor Advised Fund and ease the administrative burden—with the option of co-investing with the Boston Foundation on local grants.

### **Planned and Legacy Giving**

The Boston Foundation offers many creative ways to incorporate charitable giving into estate planning. Planned and legacy giving is an excellent way to establish a charitable legacy, while realizing significant financial and tax benefits. These are the basic options.

- ♥ Gifts by Will or Trust
- ♥ Gifts of Retirement Plan Assets and Life Insurance
- ♥ Gifts That Pay an Income
- ♥ Gifts That Preserve Assets for Heirs

## *Philanthropic and Donor Services*

An entire department at the Boston Foundation is dedicated to working with donors to make their philanthropy as effective and fulfilling as possible. Staff members help donors identify organizations and programs that will benefit most from their support

and offer opportunities to ‘co-invest’ in effective and timely programs already receiving grants from the Foundation. Donors are invited to special briefings on topics of current interest with leaders in the field—and given the opportunity to become involved on a series of levels with the civic leadership work of the Foundation.

## *Advantages of Partnering with the Boston Foundation*

Like many other excellent gift fund services, the Boston Foundation offers:

- ♥ Simplicity and speed in opening and maintaining a fund;
- ♥ Maximum tax benefits;
- ♥ Online grantmaking and fund services;
- ♥ Investment expertise and enhanced investment returns; and
- ♥ Anonymity.

The Boston Foundation also provides our donors with so much more:

- ♥ Personalized philanthropic and donor services, with a staff ready to meet donors’ needs and answer all of their questions about grantmaking;
- ♥ Experts in all of the major areas of community life in Greater Boston and across the country;
- ♥ Invitations to Understanding Boston forums and access to leading-edge research about our community;
- ♥ A full range of planned and legacy giving opportunities; and
- ♥ Connection to an ‘extended family’ of donors and civic leaders who are dedicated to making Greater Boston as great as it can be.

For more information about establishing a fund or making a planned or legacy gift, call the Development Office at 617-338-1700 or visit the Foundation’s website at [www.tbf.org](http://www.tbf.org) and choose Become a Donor.

# Boston Foundation Funds

*Y*oung high tech professionals and retired senior citizens, volunteers and heads of major corporations, bankers, artists, doctors, venture capitalists, lawyers and teachers. Individuals, entire families and the boards and staffs of for-profit businesses and nonprofit organizations. A remarkably wide range of people have established and contributed to funds at the Boston Foundation over the last 90 years.

Some Boston Foundation donors are carrying on a tradition established by their families and even ancestors. Others are new to the world of philanthropy, and just beginning to shape their giving philosophy.

A growing number are rolling up their sleeves and actively participating in the areas of community life about which they are most passionate—and in the process taking advantage of the Foundation’s extensive knowledge about the Greater Boston community.

The following pages include lists of all funds held by the Foundation, beginning with those that were established during 2005. 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.



## *56 New Funds Were Established in 2005*

We gratefully acknowledge the generous community-minded people who established new funds at the Boston Foundation during 2005.

The following list includes Discretionary Funds, Designated Funds and Donor Advised Funds.

### **Discretionary Funds**

Alzheimer's Disease Research Foundation  
East Boston Chelsea Creek Fund

### **Designated Funds**

Sybil F. Stone Arts Scholarship Fund

### **Donor Advised Funds**

A & E Educational Quest Fund  
AADS Memorial Fund  
Acacia Fund  
Agatha Fund  
Anthos Family Fund  
Ausschnitt Fund  
Kathryn and Charles Avison – Miriam  
Avison Charitable Fund  
Charlotte Saltonstall Bigham Memorial Fund

Bitpipe Legacy Fund  
Timothy and Kathryn Conway Charitable  
Fund  
Cregan Charitable Fund  
Joe DiGeronimo Charitable Fund  
Phyllis and Jimmy DiGeronimo Fund  
Dillon Fund  
Lesser Eber Fund  
Eisenson Family Fund  
Jack Florey Fund  
Florin Family Charitable Fund  
Rich Florin Family Fund  
Sherley Gardner-Smith Charitable Gift Fund  
Albert Francis Gilmartin Memorial  
Scholarship Fund  
Jay Habegger and Christine Nagle Fund  
W.J. Hannigan Family Fund

Herzog Family Charitable Fund  
Hobart / Toole Charitable Fund  
Robert Hooper Family Fund  
Iron Mountain Education Fund  
Stephen and Caroline Kaufer Charitable  
Giving Fund  
Mr. and Mrs. Raymond B. Keefe  
Memorial Fund  
Khudari Fund  
M. R. Kidder Charitable Fund  
Kidder SBSM (Strong Body, Strong Mind)  
Fund  
M. Volpe Kluchman Fund  
Knopf Family Charitable Fund  
G. Barrie Landry Fund  
Microsoft Unlimited Potential Fund  
Mid-Century Fund

Gabrielle J. Miller Donor Advised Fund  
Sykes Moyer Fund  
Myrtle Field Fund  
Tami E. Nason & Kent A. Lage Fund  
New Beginnings/Kidder Hildner Fund  
Thomas Perls Fund  
Kevin Phelan Fund  
Colette Phillips Scholarship Fund  
Roberts-Belove Fund  
Margaret M. Schmidt and Kenneth J.  
Danila Fund  
Schumann Family Fund  
Sherman Family Foundation Fund  
Lee J. Strauss Fund  
Susan and Michael Thonis Fund  
Scott and Jennifer Tobin Charitable Fund  
Weiss Charitable Fund

## *New Donors to the Community Fund*

The Community Fund is the most flexible Discretionary Fund held by the Foundation, because it places no restrictions on the way the income may be used, and gives our Staff and Board of Directors the resources to respond to the most critical issues facing Greater Boston today and tomorrow.

These gifts to the Community Fund were received during 2005 and are gratefully acknowledged.

### **Individuals, Charitable Funds, Corporations and Foundations**

Fleet Bank  
Gillette Company  
Ms. Helen Jones

Francis Ward Paine Foundation, Inc.  
Matthew J. & Gilda F. Strazzula Foundation  
Ms. Hungwah Yu and Mr. David J. Elliott

### **Estates & Trusts**

Donald Gregg Trust u/Will  
Elizabeth D. Herteli Trust  
Vladimir N. Herteli Trust

Estate of Elizabeth B. Hough  
Joyce E. Irving Revocable Trust  
Mason Charitable Remainder Annuity Trust

## *Donors to the Civic Leadership Fund*

This fund provides fuel for the Boston Foundation's increasingly strong role as a civic leader, including its research, convenings, task forces, and action agendas addressing the most compelling issues facing our city and region.

Abt Associates	Mr. Ferdinand Colloredo-Mansfeld	Fish Family Foundation	Ms. Katherine B. Hood
Adams Harkness	Combined Jewish Philanthropies of Greater Boston, Inc.	Fleet Matching Gifts Program	Hunt Alternatives Fund
Alzheimer's Disease Research Foundation	Ms. Jill K. Conway	Fleet Charitable Gift Fund	Mr. Brian Hyde and Mr. Joe Fiorello
Carol and Howard Anderson Family Fund at the Boston Foundation	Cooper Leeser Fund at the Boston Foundation	Mr. Laurence B. Flood	Mr. and Mrs. Ira A. Jackson
Axiom International Investors	Constance and Lewis Counts Fund at the Boston Foundation	Drs. Robert H. and Rochelle R. Friedman	Jeffrey Jones, Esq.
Beacon Capital Partners	Mr. Richard Dagen	Ms. Susan Y. Friedman	Martin S. Kaplan, Esq.
Mr. Robert L. Beal	Dainger Fund at the Boston Foundation	Fulkerson Family Fund at the Boston Foundation	Michael B. Keating, Esq.
Dr. and Mrs. James Beck	Ms. Catherine D'Amato	Mr. Allan W. Fulkerson	The Kelyn Group, LLC
Mr. Jeffrey Bilezikian	Dammann Boston Fund at the Boston Foundation	Gabrieli Family Fund at the Boston Foundation	William and AnnMarie Kennedy
Mr. Mark Blaxill	Mr. Richard and Ms. Tracey Davis	Robert and Linda Glassman Fund at the Boston Foundation	Steven and Paula Koppel
Blue Cross & Blue Shield of Massachusetts	Mr. Edward and Mrs. Paula DeMore	Carol R. & Avram J. Goldberg Fund at the Boston Foundation	Kravitz Family Fund at the Boston Foundation
Joan Bok Fund at the Boston Foundation	Denterlein Worldwide	Rachael P. & Andrew P. Goldfarb Fund at the Boston Foundation	Terry and Jonathan Lane
The Boston Company	DeWolfe Family Fund at the Boston Foundation	Goldman Sachs & Co.	Barbara Lee Family Fund at the Boston Foundation
Boston Globe	Lawrence S. DiCara, Esq.	Goodworks Fund	Liberty Mutual Foundation, Inc.
Boston Herald	Mr. James and Mrs. Janice DiStasio	Gordon Educational Fund at the Boston Foundation	LMG Fund at the Boston Foundation
Mr. and Mrs. F. Gorham Brigham, Jr.	Mr. Ralph J. Donofrio	Grogan Fund at the Boston Foundation	Loomis Sayles & Company, Inc.
Peter A. Brooke Fund at the Boston Foundation	Mr. and Mrs. John E. Drew	Mr. Steven and Mrs. Barbara Grossman	Lovett-Woodsum Family Fund at the Boston Foundation
William T. Burgin Fund at the Boston Foundation	Druker Company, Ltd.	Gualala Fund at the Boston Foundation	Mr. Bernard A. Margolis and Ms. Amanda Batey
Mr. Michael R. Burkom	Eastern Bank Charitable Foundation	Kate and Thierry Guedj	Sydell and Edward I. Masterman Fund at the Boston Foundation
Butler's Hole Fund at the Boston Foundation	Eaton Vance Management	Mr. and Mrs. Paul Guzzi	Mr. Kevin McCall
Catherine and Paul Buttenwieser Foundation	Mr. William S. Edgerly	Hale and Dorr Capital Management LLC	Emily & Bernard H. Mehlman Fund at the Boston Foundation
Louis and Julie Casagrande	Mr. Michael and Ms. Barbara Eisenson	Rev. Ray Hammond and Dr. Gloria Hammond	Ms. Mary Jo Meisner
Ms. Fay M. Chandler	Ronald E. Feldman Trust	John Hancock Life Insurance Company	Merganser Capital Management LP
Charles River Realty Advisors	Fidelity Foundation	Ramelle Hieronymus	Metro Corporation
Citizens Financial Group, Inc.	Fidelity Charitable Gift Fund (4)	Petie Hilsinger Fund at the Boston Foundation	Jack and Beth Meyer
Citizens Bank Foundation	Fiduciary Charitable Foundation		Mill River Foundation Fund at the Boston Foundation
Co-Investment Fund at the Boston Foundation	Paul and Phyllis Fireman Charitable Foundation		

Millennium Partners-Boston  
 David and Mary Ellen Moir  
 Mr. Herbert E. Morse  
 Muddy Pond at the Boston Foundation  
 David G. Mugar  
 National Development  
 New Boston Fund, Inc.  
 Mr. and Mrs. Kenneth J. Novack  
 Novotny/Swahnberg Fund at the  
 Boston Foundation  
 Obermayer Foundation, Inc.  
 Mr. Thomas L.P. O'Donnell  
 Ohrn Family Fund at the Boston  
 Foundation  
 O'Neill & Associates  
 Mr. Ruben D. Orduna and  
 Ms. Elizabeth G. Hill  
 Parker Family Fund at the  
 Boston Foundation

Mr. and Mrs. Thomas Payzant  
 Mr. and Mrs. Kevin C. Phelan  
 Pitts Family Fund at the Boston Foundation  
 Mrs. Elizabeth K. Pozen  
 Prime, Buchholz and Associates, Inc.  
 The Irving and Charlotte Rabb  
 Charitable Foundation  
 Rackemann, Sawyer & Brewster  
 Remmer-Fox Family Fund at the  
 Boston Foundation  
 Hanson S. Reynolds, Esq.  
 Mr. William G. Rogerson  
 Andrew L. & Leslie (George) Ross Fund  
 at the Boston Foundation  
 Risha C. and Paul A. Samuelson Fund  
 at the Boston Foundation  
 Mr. Joseph R. Savage  
 Schawbel Family Fund at the  
 Boston Foundation

Schoen Family Foundation  
 Shawmut Design and Construction  
 Paula L. and Edwin N. Sidman  
 Family Fund  
 Richard & Susan Smith Family Foundation  
 Snowden - Trimmier Family Fund at the  
 Boston Foundation  
 Mr. and Mrs. Alan D. Solomont  
 Sovereign Bank of New England  
 Mrs. Helen Spaulding  
 Stephanie H & David A Spina Family  
 Foundation  
 Micho and William J. Spring  
 Squire Family Fund at the Boston  
 Foundation  
 Stamps Family Charitable Foundation, Inc.  
 State Street Bank & Trust Company  
 Stone Charitable Fund at the  
 Boston Foundation

Richard Talkov & Susan Davies Fund  
 at the Boston Foundation  
 Mr. and Mrs. Peter Thomsen  
 Tishman Speyer Properties  
 Topol Family Fund at the Boston  
 Foundation  
 Travaglini Committee  
 Vanguard Charitable Endowment Program  
 Verizon Foundation  
 Mr. Robert R. Wadsworth  
 Wainwright Bank  
 R. F. Walsh Company, Inc.  
 Mr. and Mrs. Robert W. Weinstein  
 Wellington Management Company  
 Charitable Fund  
 Mrs. Benaree P. and Mr. Fletcher H. Wiley  
 Winn Development Company  
 Ms. Alice H. Wolpert  
 Ms. Hungwah Yu and Mr. David J. Elliott

### *Planned and Legacy Gifts Received*

Many donors take advantage of the opportunity to make gifts to the Boston Foundation through a broad range of planned giving vehicles, including bequests, charitable remainder and lead trusts, charitable gift annuities, gifts of retirement plan assets and life insurance, and the Foundation's Pooled Income Fund.

During Fiscal Year 2005, close to \$11 million in planned and legacy gifts were received from the following, which are gratefully acknowledged.

Estate of Emily T. Allen  
 Estate of David Avison  
 Estate of George P. Beech  
 Estate of Pauline S. Germeshausen  
 Estate of Albert G. Gilmartin

Donald Gregg Trust u/Will  
 Estate of John Hagopian  
 Elizabeth D. Herteli Trust  
 Vladimir N. Herteli Trust  
 Estate of Elizabeth B. Hough

Estate of Francis C. Huvos  
 Estate of Samuel Lamar Jordan  
 Estate of Arthur R. Kravitz  
 Estate of Marian S. Larson  
 Mason Charitable Remainder Annuity Trust

Esther Taft Quinn Charitable Lead Annuity  
 Trust  
 Estate of Patricia Remmer  
 Florence Snelling Trust  
 Estate of Margaret C. Williams

## *Rogerson Legacy Society*

The Rogerson Legacy Society has been established to recognize and thank those donors who have made arrangements to support the work of the Boston Foundation through a planned gift to benefit a variety of charitable funds. The following donors are current members of the Society.

Howard and Carol Anderson	Marian M. Ferguson	John H. Livens	Charles R. Schroeder
Geoffrey D. Austrian	June M. Ficker	Dunbar Lockwood, Jr.	Annabelle W. Shepherd
Theodore S. Bacon, Jr.	Edward S. Fleming	Hugo Logemann, Jr.	Binkley and Paula Shorts
Sherwood E. Bain	Americo J. Francisco	Donald J. and Susan Kelley MacDonald	William F. Spang
Mary Barber	Walter Eugene Geier	Myron and Barbara Markell	David F. Squire
Allen I. Barry	Robert J. Glaser, M.D.	Alice McGrath	Arthur L. Stevenson
Martha L. Bass	Samuel A. and Pauline S. Groves	Edward J. and Jane S. Michon	Ellen Stillman
Beryl H. Black	Thomas Hale	Robert Minnocci	Anne B. Stone
David Blot	Charlotte I. Hall	Charles Fessenden Morse	George W. Thorn, M.D.
Kenneth S. Brock	Mrs. Chester Hamilton	Donald M. Morse	Libby and Sidney Topol
Seth N. Brockway	Marilyn L. Harris	Frederick W. Neinas, M.D.	Alan and Pamela Trefler
Jacob F. and Barbara C. Brown	Ann S. Higgins	Mary Greene Nelson	David F. Tuttle, Jr.
A. Page Browne, Jr.	Kenneth D. and Cynthia L. Holberger	Mark A. and Judith A. Osborne	Joy E. Van Buskirk
Beryl H. Bunker	Chuck and Gayle Holland	Nancy E. Peace	Henry Walter
George E. Burden	Marjorie Howard-Jones	Drs. Robert A. and Veronica S. Petersen	Gordon Weil, Jr.
Margaret A. Bush	Richard O. Howe	Agatha W. Poor	Elizabeth A. Wheeler
Frank and Ruth Butler	Brian Hyde and Joe Fiorello	Nathaniel Pulsifer	Stetson Whitcher
Robert B. Canterbury	Jane Wegscheider Hyman	Glendora M. Putnam	Constance V. R. White
Margaret J. Clowes	Donald G. Irving	Irving W. Rabb and Charlotte F. Rabb*	Michael N. and Mary M. Wood
Frances F. Connelly	David Jeffries	Warren Radtke and Judith Lockhart Radtke	Eleanor D. Young
Elizabeth D. Coxe	Stephen G. and Rosemarie Torres Johnson	Richard L. Robbins	
Diane Currie (to benefit the Diane Currie Wildlife Fund)	Helen M. Jones	Sumner and Helen Rodman	
Elizabeth T. Damon	Karen Joyce and John Fitzgerald	Eleanor L. Ross	
Harriet E. Dolan	Ms. Ruth G. Kahn	Edith M. Routier	
Joy G. Dryfoos	Mr. Andrew M. Kamarck	Jordan S. Ruboy, M.D.	
Malcolm Dunkley	Gary P. and Susan Kearney	Beverly H. Ryburn	
Knight Edwards	Phyllis Kleban	Anthony Mitchell Sammarco	
Mary C. Eliot	Shirley G. Lagrenade	Mary L. Schaffner	*deceased
	Frances J. Lee-Vandell	Ruth Gessner Schocken	

## *Discretionary Funds*

Many donors have established funds that are totally unrestricted or have broad purposes, giving TBF flexibility in the way the income is used. These are 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 over the last 90 years.

### The Community Fund

Donors to the Community Fund want to address the needs that people of Greater Boston have today—and give TBF the resources to meet future needs as well. The following list includes donors who have made gifts totaling more than \$5,000 to the Community Fund, with the year of their first contribution noted in parentheses.

#### **Individuals, Corporations and Foundations**

Barr Foundation (2004)	Donald J. Hurley Memorial Fund (1978)	William L. Birely (1959)	Donald Gregg (1963)
Mr. and Mrs. Peter Brooke (1994)	Jane W. Hyman (2002)	Edmund Bridge (1933)	Patricia Grisham (1964)
The Boston Company (1991)	Dr. & Mrs. Arthur R. Kravitz (1987)	Frederick W. Bridge (1942)	Joseph Guild (1964)
Henry Burkhardt, III (1986)	Mr. and Mrs. Gael Mahony (1982)	Jesse F. Burton (1971)	John Hagopian (2002)
Catherine and Paul Buttenwieser Foundation (2003)	The Overbrook Foundation (1991)	Susan Cabot (1947)	Ellen Page Hall (1931)
William Putnam Cabot (1970)	Francis Ward Paine Foundation, Inc. (1982)	Charles T. Carruth (1983)	Dorothy C. Harris (1967)
Dorothy Jordan Chadwick Fund (2002)	Harry & Minnie Rodwin Memorial Fund (1975)	Gladys Chiquoine (1983)	Elizabeth M. Hay (1972)
Michael F. Cronin (2004)	Dr. W. Davies Sohler, Jr. (1990)	Helen A. Claflin (1992)	Fred R. Hayward (1969)
Lawrence and Susan Daniels Family Foundation (2003)	Mrs. Helen Spaulding (1992)	William H. Claflin (1983)	Elizabeth D. Herteli Trust (2005)
Wm. Arthur Dupee Memorial Fund (1984)	Matthew J. & Gilda F. Strazzula Foundation (2000)	Winifred I. Clapp (1990)	Vladimir H. Herteli Trust (2005)
Virginia Ellis Memorial Fund (1976)	Gertrude T. Taft (1956)	Horace W. Cole (1992)	Anna P. Hills (1969)
Leon R. Eyges Memorial Fund (1963)	Tech/Ops, Inc. (1982)	Anastasia Conte (1988)	Agnes G. Homes (1961)
George R. Farnum (1982)	United Asset Management Corporation (1994)	Arthur S. Cummings (1943)	Adeline D. Hooper (1973)
First National Bank of Chicago (1988)	<b>Estates</b>	Charlotte E. H. Curtis (1940)	Mary Frothingham Hooper (1961)
Martha M. Fosdick Fund (1978)	Alice A. Abbott (1967)	Maria Corinne Dana (1963)	Elizabeth B. Hough (2002)
John Lowell Gardner Fund (1987)	Matilda S. Alley (1964)	Luisita L. Denghausen (1990)	Elizabeth B. Hurley (2000)
Grand Bostonians Dinner (1984)	Miriam S. Alley (1965)	Kenneth S. Domett (1960)	Frances A. Jordan (1978)
Mrs. Jean Hanlon (1991)	Margaret Sears Atwood (1970)	Mary Frances Drown (1929)	Paul Kimball (1964)
Haymarket People's Fund (1994)	Margaret E. Babcock (1973)	George H. Eastman (1971)	James G. Knowles (1982)
HBB Foundation (1995)	Annie O. Baldwin (1953)	Benjamin Fisher (1996)	Ida Fales Lamb (1967)
Katherine B. Hood (2000)	Wilbert S. Bartlett (1969)	Edith R. Fottler (1948)	James Longley (1918)
	Reginald Benting (1984)	Alma L. Frost (1948)	Clara N. Marshall (1943)
		Anna C. Frothingham (1941)	Ann G. McFarlane (2000)
		Forrest C. Gates (1970)	Arthur W. Moors (1950)
		Mary M. Geist (1982)	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)  
 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)  
 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)  
 Joseph A. White (1979)  
 Edward E. Williams (1950)  
 Lizzie A. Williams (1951)

**Trusts**

Margaret Shaw Allen Trust (1982)  
 James R. Bancroft Trust (1983)  
 Helen C. Barker Trust (1990)  
 Nancy Beals Trust U/W (1984)  
 Richard A. Berenson Family Trust 1972 (2000)  
 Nelson Bigelow Trust (1990)

Mabel M. Brown Trust (1991)  
 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)  
 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)  
 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)

Barbara Estabrook Livermore Trust (1982)  
 Cora E. MacKenzie Trust U/Ind (Cora E. MacKenzie Fund) (1973)  
 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)  
 J. de Vere Simmons Trust (1985)  
 Edson B. Smith Trust U/A (1984)  
 Irene C. Smith Trust U/A (1975)  
 Spaulding-Potter Charitable Trusts (1972)  
 Margaret Castle Tozzer Trust U/Ind (1978)

## 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.

(Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

Adams, Harkness & Hill Fund (1984) unrestricted  
 Solomon Agoos Fund (1987) to promote the charitable purposes of popular education, instruction and dissemination of information in the field of ethics  
 \*Anonymous Fund (1987) unrestricted

\*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

MassDevelopment Arts Fund for Community and Economic Development (2003) A sub-fund of the Boston Foundation Arts Fund, the MassDev 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 that promote

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

\*Stephen and Sybil Stone Arts Fund (2003) to support programs and organizations that provide residents, especially youth and young adults who do not otherwise have the means for involvement, with opportunities to attend and participate in the arts

Brooks White, Jr. Memorial Fund (2001) a component fund of the Boston Foundation Arts Fund

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

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

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

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

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

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

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

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

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. Diggles Foundation Fund (1993) to aid Mass. 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 Mass. 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 Creek 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, especially charities outside of Boston

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

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

Edward Glines Fund (1938) unrestricted



- 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 home
- Mary Harris Fund (1940) for widows and single women in straitened circumstances
- 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
- Kevin Kelly Fund for the Performing Arts (1994) for the Boston Foundation's Arts Initiative
- Edith Shedd Larsen Fund (1962) to the extent feasible to aid and advance research toward the cure and relief of arthritis
- Maude A. MacNaught Fund (1979) preferably for children suffering from diseases of the eye
- 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
- 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, non-profit radio and television stations) providing musical programs
- \*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
- Alice F. Rosenquist Fund (1984) with preference to organizations that assist the elderly or blind
- Walter J. & Marjorie B. Salmon Fund (1999) unrestricted
- Louis Agassiz Shaw Fund (1991) for the benefit of under-privileged children
- Katherine Dexter Shelman Fund (1954) for the benefit of worthy aged people
- \*Arthur L. Sherin and Frances C. Sherin Fund (2003) for aid to the blind or disabled, aid to homeless or hungry people, convalescent or recuperative care of persons of limited means, care of the indigent aged, assistance for children considered to be not adoptable, and studies or experimental programs desired
- Sophia Snow Fund (1948) for care and support of destitute children of Roxbury
- \*Starr Foundation Fund (1985) to alleviate the sufferings of the truly needy in the Greater Boston area in terms of food, clothing and shelter
- 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
- 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 that respond to some of the most pressing challenges facing our community in innovative ways. (Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

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| <p>After School for All Partnership Fund (2003) for the Foundation's After School Initiative</p> <p>*Arts Service Organization Fund (2003) for grants to art service organizations</p> <p>*Boston Community Building Network (1987) for development projects dedicated to reducing persistent poverty in Boston</p> <p>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</p> <p>*Boston Schoolyard Funders Collaborative (1995) to improve the greenspaces surrounding Boston Public School buildings</p> <p>*Civic Engagement Project Fund (2002) to increase nonpartisan voter registration and mobilization in low-income communities and communities of color with low rates of voter participation</p> <p>*Civic Leadership Fund at The Boston Foundation (2002) Fund designed to raise outside contributions in support of annual expenses associated with TBF's expanded role as convener and host of major community forums which promote the civic health of our region</p> <p>Community Safety Fund (2002) to reduce the rate of violent crime in Boston after years of unprecedented success during the 1990's</p> <p>*EdVestors Fund (2002) an initiative to educate potential donors about urban school reform issues and to interest them in selected innovative educational projects and programs in Eastern Massachusetts</p> | <p>*EdVestors Collaborative Fund (2003) for nonprofit-school partnerships that enable schools and teachers to achieve their instructional goals</p> <p>*English for New Bostonians Fund (2000) for support of the meeting the ESOL Demand program</p> <p>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</p> <p>*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</p> <p>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</p> <p>Neighborhood Development Support Collaborative Fund (1993) for a Local Initiatives Support Corporation program providing operating and technical support to Boston community-based development organizations</p> <p>Neighborhood Preservation Initiative Fund (1995) for community development in East Boston</p> <p>New Economy Initiative Fund (2001) for grants under the Foundation's New Economy Initiative</p> <p>*Pilot Schools Project Fund (2002) for grants under the Foundation's Pilot Schools Initiative</p> | <p>Polaroid Fund (1997) to help children and adults become more independent and realized their full potential as successful members of society</p> <p>President's Initiative Fund (2002) to create the President's Initiative Pre-Development Program Fund</p> <p>Program Related Investments Fund (1990) for program related investment loans</p> <p>*SkillWorks Fund (2001) a partnership between several local and national funders to focus on job training for disadvantaged job seekers</p> <p>Teen Initiative Best Practices Fund (2005) to recognize best practices in teen programming</p> <p>*United Way Millennium Fund for Children and Families (1999) an endowment partnership with the Boston Foundation:</p> <p>  Ansin Fund (2002) a component fund for the United Way Millennium Fund for Children and Families</p> <p>  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 &amp; Girls Club</p> <p>*Connell Family Fund (2000) a component fund for the United Way Millennium Fund for Children and Families</p> <p>*Carol R. &amp; Avram J. Goldberg Fund (2002) a component fund for the United Way Millennium Fund for Children and Families</p> <p>Lawrence &amp; Beth Greenberg Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> | <p>Darlene &amp; Jerry Jordan Fund for Children (2000) a component fund of the United Way Millennium Fund for Children and Families</p> <p>Margarete McNeice Fund (2001) a component fund of the United Way Millennium Fund for Children and Families</p> <p>David R. and Muriel K. Pokross Fund (2003) a component fund for the United Way Millennium Fund for Children and Families</p> <p>Schoen Family Fund (1999) a component fund of the United Way Millennium Fund for Children and Families</p> <p>*Tom &amp; Nancy Shepherd Fund (2001) a component fund of the United Way Millennium Fund for Children and Families</p> <p>*State Street Foundation Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> <p>J.C. Tempel Fund for Children (2001) a component fund of the United Way Millennium Fund for Children and Families</p> <p>*Vinik Family Fund (2000) a component fund of the United Way Millennium Fund for Children and Families</p> <p>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</p> <p>Vision Fund (1994) for small grants to community organizations for planning, development and training</p> |
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## *Designated Funds*

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

(Note: Those funds with asterisks received contributions in 2005, and are gratefully acknowledged.)

Acton-Boxborough Student Activity Fund (1981) for student activities of the Acton-Boxborough Regional School District	Red Auerbach Youth Foundation Fund (1983) endowment for recreational and athletic programs for the youth of Greater Boston	Brookline Youth Concerts Fund (1995) to fund music prizes to Brookline High School students and for the Dubbs Concerto Competition	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
Fund for Adult Literacy (1985) for support of literacy efforts in the City of Boston	Lilian G. Bates Fund (1951) for three named agencies	Charles T. Burke Fund for the Watertown Boys and Girls Club (1994) for the Boys and Girls Club of Watertown, Inc.	Ellen D. Cholerton Fund (1969) one half of income for the Unitarian Universalist Service Committee and one half unrestricted
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	Grace & Floyd Lee Bell Fund (1987) for the benefit of the Museum of Fine Arts	Charles T. Burke Fund for the Watertown Free Public Library (1994) for the Watertown Free Public Library	*City to City Fund (2005) for the City to City program
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	Boston Ballet-E. Virginia Williams Endowment Fund (1983) for educational programs and projects of the Boston Ballet	Agnes T. Carruth Fund (1983) to the Kind Edward VII Memorial Hospital, to be used in whatever manner the governing body of said hospital shall see fit, but preferably for the care and treatment of persons suffering from asthma	*English High School Class of 1934 Award Fund (1994) 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
ACCESS Education Fund (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation	Boston Bar Association Endowment Fund (1983) for public service activities of the Boston Bar Association	James F. Casey Fund (1949) for seven named agencies	Ernest & Vera Clivio Charitable Memorial Fund (1981) for the benefit of two named agencies
*Alzheimer's Disease Research Foundation Fund (2005) for the Alzheimer's Disease Research Fund	Boston Baroque Fund (2003) for general operating support of Boston Baroque	Alex Castoldi Memorial Scholarship Fund (1981) for scholarships for Newton North High School students	Elizabeth Cook ACF Student Fund (1997) to provide short-term funds to students associated with the Ad Club Foundation
Frank E. Anderson Fund (1975) for Massachusetts Society for the Prevention of Cruelty to Animals	*Boston Foundation Administrative Endowment Fund (1987) to benefit the administration of the Boston Foundation, Inc.	Dr. Walter Channing Memorial Fund (1933) for the Massachusetts Association for Mental Health or for some kindred purpose	Almon B. Cook-Relief Fund (2001) for the benefit of Northeast Hospital Corporation in Gloucester
Artists Foundation Endowment Fund (1984) for support of The Artists Foundation programs	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	*Charles River Parklands Stewardship Fund (2002) annual income distribution for the benefit of the Charles River Conservancy	*Robert S. Cummings Scholarship Fund (1997) scholarship awards for children of Nixon Peabody LLP employees who plan to pursue post secondary education in college or vocational programs
	Richard L. Bowser Fund (1985) for the benefit of Simmons College and Dartmouth College	Philip P. Chase Fund (1955) for five named agencies	
	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		



\*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

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  
 The English High School-John P. Murphy Scholarship Fund (1996) for a scholarship award for one student at English High School

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  
 Felix Fox Memorial Fund (1974) for the Community Music Center of Boston  
 Peter Marshall French Memorial Fund (1976) for the benefit of Governor Dummer Academy  
 General Support Fund for Education (1987) for the benefit of the Boston Plan for Excellence in the Public Schools Foundation, Inc.  
 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  
 Hancock Endowment for Academics, Recreation & Teaching (1985) for support of the Boston Plan for Excellence in the Public Schools Foundation  
 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) for the Indian Hill Music Center to endow the Indian Hill Symphony Orchestra's conductors's chair  
 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
- Jamaica Plain Open Studios Fund (2002) for support of the Jamaica Plain Arts Council
- 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
- 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
- MHEAC Fund for ACCESS (1986) for support of the Boston Plan for Excellence in the Public Schools Foundation
- Joe Alex Morris, Jr. Memorial Lectureship Fund (1982) income to be paid to the Neiman Foundation for Journalism at Harvard University
- 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
- 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
- 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
- Stephen D. Paine Scholarship Fund (1999) scholarship recipients to be determined by a Massachusetts Cultural Council jury process
- 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
- Primary Care Fellowship Program Fund (1983) to support Harvard Medical School's program of preparing general internists for academic careers
- Public School Management Research Fund (2002) to support Steven F. Wilson's project entitled, "Private Management of Public Schools: What Have We Learned?"
- Charlotte F. & Irving W. Rabb Family Fund (1984) for Boston Symphony Orchestra youth programs
- 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
- \*Stephen A. Stone Scholarship Fund (2002) for students at Wareham High School in Wareham, Massachusetts
- Sybil F. Stone Arts Scholarship Fund (2005) for a scholarship at the School of the Museum of Fine Arts

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

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

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

Surkin Endowment Fund (1981) for support of the various projects of the Boston Center for the Arts

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

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

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

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

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

George & Judy Webb Fund (1986) to benefit Princeton University and Phillips Academy

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

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

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

### *Donor Advised Funds*

The following is a list of all Donor Advised Funds established by people who choose to be actively involved in the grantmaking process.

The year the fund was established is listed in parentheses.

(Note: Those funds with asterisks received contributions in 2005. We are grateful to the many donors who have chosen to add to their charitable funds this year.)

A.L.S. Fund (2002)

\*AADS Memorial Fund (2004)

Maida & George Abrams Fund (1985)

\*Abromowitz/Ruttenberg Family Fund (2000)

\*Acacia Fund (2004)

Ad Club Foundation Fund (1987)

Adopt-A-Statue Endowment Fund (1988)

Affinity Services Corporation Fund (2003)

\*Agatha Fund (2004)

\*Alchemy Arts Fund (1993)

Richard and Kimberlee Alemian Fund (1996)

Peter J. and Joan M. Allegrini Fund (1990)

\*Emily T. Allen, Linda P. Allen and F. Towne Allen Charitable Gift Fund (2004)

Emily Tuckerman Allen Fund (2004)

\*Rosamond W. Allen Charitable Fund (2004)

Dwight & Stella Allison Fund (1982)

\*Alper Family Fund (1995)

\*Altamira Fund (1994)

George and Nedda Anders Fund (1991)

Carol and Howard Anderson Family Fund (1997)

Barbara Jane Anderson Fund (2000)

Michael & Ellen Angino Fund (1997)

\*Harry Ankeles Scholarship Fund (1992) scholarships for students from Peabody who will graduate from a high school located in Peabody who are seeking undergraduate degrees from accredited colleges or universities

\*Anony Fund (1998)

Anonymous Fund IV (1995)

\*Anthos Family Fund (2004)

\*Anthropologists' Fund for Urgent Anthropological Research (1996)

\*Arba Lifnot Boker Fund (1992)

Atalaya Fund (2004)

\*Atlantic Fund (1997)

\*Ausschnitt Fund (2004)

\*Avery Family Fund (2003)

\*Kathryn and Charles Avison - Miriam Avison Charitable Fund (2005)

Katharine & George Baker Fund (1987)

Royal P. Baker & Stephanie S. Baker Memorial Fund (1988)

Richard Balzer Fund (2004)

Bank of Boston 200th Anniversary Fund (1982) for support of the Boston Plan for Excellence in the Public Schools Foundation

BANT Fund (1986)

John & Judith Barber Fund (2002)

\*Richard Allan Barry Fund (2002)

Basil Street Fund (1998)

Baudanza Family Fund (1997)

\*Baupost Group Charitable Fund (2004)

Bellevue Fund (1999)

William D. & Mary E. Benjes Fund (1984)

\*Charlotte Saltonstall Bigham Memorial Fund (2004)

Bird Fund (1999)

\*Bitpipe Legacy Fund (2004)

\*Linda Cabot Black Fund (1983)

\*NICSA/William T. Blackwell Scholarship Fund (1995)

Emmanuel and Jane Blitz Fund (1992)

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 Distribution Fund (1992)

\*Boston Foundation Real Estate Gift Fund (2004)

Braverman Family Fund (1992)

\*Francis J. Bresnahan Educational Scholarship Fund (1986)

Peter A. Brooke Fund (1998)

\*Peter W. and Ruth H. Brooke Fund (2004)

John F. Brooke Fund (2000)

\*Franklin S. & Cynthia B. Browning Fund (1988)

Bullock Family Fund (1997)

\*Burden Family Charitable Fund (1999)

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 Fund (1994)

C & K Foundation Fund (2000)

Norman L. Cahners Fund (1984)

Campbell Foundation Fund (2003)

\*Allan R. and Martha M. Campbell Fund (1996)

\*A. Bruce Campbell Fund (2002)

Erin K. Campbell Fund (2002)

Michael C. Campbell Fund (2002)

Carpenter Family Foundation Fund (1997)

C. Alec and Sarah O' H. Casey Charitable Fund (1993)

\*Margaret W. Casey Fund (1986)

Ellen W. Casey Fund (1993)

\*John J. Cattaneo III Fund (1984)

Champa Charitable Foundation Fund (2003)

\*Chasin/Gilden Family Fund (2000)

\*Chea Uy Fund (1991)

Charles Ezekiel & Jane Garfield Cheever Fund (1998)

\*Chelsea Community Fund (1997) (including the Cranford Fund) to be used primarily for the benefit of the People of Chelsea, MA, including specifically but without limitation, the Chelsea Human Services Collaborative

\*Joyce Chen and Helen Chen Foundation Fund (1995)

Christ on Earth Fund (1989)

Christ on Earth Fund II (2002)

Michael W. Christian Memorial Fund (1986)

Dr. & Mrs. B.U. Chung Fund (1999)

Chung Family Fund (1999)

Churchill Family Fund (1997)

Circle Fund (1997) priority given to organizations which support grassroots organizing for social change

John J. Clancy Fund (1998)

Clarke Fund (1987)

\*Cohen/Lucas Fund (1999)

Coit Family Fund A (2001)

Colby Charitable Fund (1980)

\*Colette Phillips Scholarship Fund (2004)

Colony Road Fund (1997)

Community Benefits Trust Fund (1998)

Condor Street Fund (1988)

John and Kimberly Cone Fund (1995)

\*Constance and Lewis Counts Fund (1990)

\*Timothy and Kathryn Conway Charitable Fund (2004)

Coolidge Family Fund (1982)

Cooper Leeser Family Fund (1997)



Copernicus Fund (2003)

Corvelli Fund (1996)

George D. & Angelyn K. Coupounas Fund (1994)

Demetrios G. C. & Kimberly A. Coupounas Fund (1996)

Sophia D. Coupounas Fund (1996)

\*Cregan Charitable Fund (2005)

Crosby Family Fund (2000)

\*Dainger Fund (1997)

Dammann Boston Fund (2003)

Paula Marie Danforth Memorial Scholarship Fund (1990) for a student attending either Lincoln/Sudbury Regional Vocational High School or Minuteman Regional Vocational Technical High School

Darling Family Fund (1983)

John Da Silva Memorial Fund (1988)

Todd F. Davenport Family Foundation Fund (2000)

Elizabeth Deming Coxe Fund (1995)

Edward L. and Paula B. DeMore Fund (2003)

deVille Fund (1994)

DeWolfe Family Fund (2000)

\*Joe DiGeronimo Charitable Fund (2004)

\*Phyllis and Jimmy DiGeronimo Fund (2004)

\*Dillon Fund (2004)

Doe Noordzij Fund (2001)

\*Eugene B. & Nina L. Doggett Charitable Fund (1999)

Douglas Drane Family Fund (1984)

Drane Center Fund (2002)

Duggan Charity Fund (1998)

Margaret Eagle Foundation Fund (2000)

\*Lesser Eber Fund (2005)

\*Echo Rock Fund (2000)

\*A & E Educational Quest Fund (2004)

\*EdVestors Grantmaking Fund (2003)

\*Eisenson Family Fund (2005)

\*Ellis Family Fund (2003)

Employment Retention Fund (2004)

Ethics Trust Fund (1993)

Evans Family Fund (1999)

Norris & Constance Evans Charitable Fund (1999)

Eagle Bank-Frank E. Woodward Scholarship Fund (1985) scholarships for Everett residents

Excalibur Fund (1999)

\*Peter and Ellen Fallon Fund (1997)

Thomas F. Farb & Stacy S. Valhouli Family Fund (2001)

Fayerweather Fund (1988)

Martin & Kathleen Feldstein Fund (1986)

\*Ferdinand Fund (2000)

Fine Family Foundation Fund (2002)

Mark Hayden Fineman Chess Tournament Fund (1985) for awards to pre-high school students of the Nauset Regional School System who have demonstrated the greatest skill in chess

\*Fisher Family Fund (2000)

Fishreys Family Philanthropic Fund (1999)

\*Gloria A. Flaherty Fund (2003)

Edward S. Fleming Fund (1983)

\*Jack Florey Fund (2004)

\*Florin Family Charitable Fund (2004)

G. David Forney, Jr. Fund (1986)

Forshey Family Fund (1997) to provide opportunities for enhancing the quality of life for children and families

\*Americo J. Francisco Charity Fund (1998)

Americo J. Francisco Scholarship Fund (1993)

\*Niki & Alan Friedberg Fund (1986)

Orrie M. Friedman Charitable Fund (1995)

Fulkerson Family Fund (1998)

Davis R. Fulkerson Fund (1999)

Lyle W. Fulkerson Fund (1999)

Sarah H. Fulkerson Fund (1999)

\*Gabriel Family Fund (2001)

Gabrieli Family Fund (1997)

Gaffney/Kames Foundation Fund (1997)

Ganesh Fund (2001)

\*Gannon Family Charitable Fund (2003)

\*John Lowell Gardner Fund (1986)

\*Sherley Gardner-Smith Charitable Gift Fund (2004)

R. Abel & Nancy L. Garraghan Fund (1986)

Dave Garroway Fund (1982)

Brad Gatlin Family Fund (1995)

Gaudette Family Fund (2000)

Carl J. Gilbert Fund (1984)

\*Albert Francis Gilmartin Memorial Scholarship Fund (2005) for students of Quincy, MA, residing in the Houghs Neck area

\*Gladstone Family Charitable Fund (2003)

Robert and Linda Glassman Fund (1985)

Globe Mallow Fund (2000)

Gold Bug Fund (1995)

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)

\*Rachael P. & Andrew P. Goldfarb Fund (2000)

Louis & Phebe Goodman Fund (1996)

Goodworks Fund (2002)

Gordon Educational Fund (2001)

Sandra & Philip Gordon Family Foundation Fund (2001)

\*Robert L. Gould Fund (1987)

Raymond C. & Joan C. Green Fund (1984)

Grogan Fund (2001)

Patricia H. Gross Fund (1999)

\*Gualala Fund (1991)

\*Charles & Dorothy Gullickson Fund for Social Change (1998)

H. Family Fund (2003)

\*Mary Haas and Ronald Leavitt Donor Advised Fund (2001)

\*Jay Habegger and Christine Nagle Fund (2004)

Charles Hammond Fund - Hanover (1972)

Charles Hammond Fund - Springfield (1972)

W.J. Hannigan Family Fund (2004)

\*Ken and Becky Hansberry Fund (2001)

Charlotte C. Hart Family Fund (2001)

Steven W. Harvey and Susan A. Walsh Fund (1990)

Alfrederic S. Hatch Fund (1981)

\*J. Allan Hauter Memorial Fund (2004)

\*James E. Hayden Charitable Fund (2001)

Hebb Charitable Fund (2003)

HEIRS Fund (1996)

Heitman Family Fund (1994)

Hel lyn Fund of Boston (1998)

Helies Family Fund (2000)

Elizabeth D. Heller Fund (1987)

Henderson Fund (1996)

Henry Fund (1986)

E. Byron Hensley Jr. Charitable Fund (1993)

\*Herzog Family Charitable Fund (2004)

\*Hewitt Family Charitable Trust Fund (1993)

\*Ann S. Higgins Fund (2001)

\*Lucius T. Hill III Fund (2000)

\*Petie Hilsinger Fund (1999)

Hingham Education Foundation Fund (1995)

Marc Hirschmann Foundation Fund (2002)

\*Hobart / Toole Charitable Fund (2004)

Hoffman Fund (1986)

Holberger Family Fund (1993)

Holland Family Fund (1993)

Gilbert H. Hood Family Fund (1980)

\*Robert Hooper Family Fund (2004)

\*Helen R. Homans Fund (1984)

\*Hourless Fund (1997)

Hamblin L. Hovey Institute Fund (1983) for the needy and charitable organizations of Waltham

M. Benjamin Howe Fund (1997)

\*Hoyt Family Fund (2000)

Hunt Fund for Children (2001)

Investing in the Future Fund (2000)

\*Ipswitch Fund (2000)

\*Iron Mountain Education Fund (2004)

\*J. Jill Compassion Fund (2002)

\*Mitchell & Diane Jacobs Fund (1998)

\*JAHHELBE Fund (2002)

James Family Fund (2001)

Rogina L. & Stephen B. Jeffries Charitable Fund (1991)

Jochkan Charitable Fund (2001)

Stephen G. & Rosemarie Torres Johnson Family Fund (2000)

\*Jonas Family Fund (2000)

\*Hubie Jones Fund (2004)

\*Samuel Lamar Jordan Trust Fund (2000)

Jumping Rock Fund (2000)

Kalman Family Fund (1996)

\*Beton M. Kaneb Fund (1983)

\*Albert J. & Diane E. Kaneb Family Fund II (1997)

\*Patricia A. Kaneb Fund (2003)

Steven E. Karol Charitable Foundation (1999)

\*Kassler Family Fund (2000)

Leslie Victor Kates and Richard S. Kates Fund (2001)

\*Stephen and Caroline Kaufer Charitable Giving Fund (2004)

Kaye Charitable Fund (2003)

John & Anne-Marie Keane Foundation Fund (1997)

Kearney Family Fund (1995)  
 \*Mr. and Mrs. Raymond B. Keefe Memorial Fund (2005)  
 \*Keewaydin Fund (2001)  
 Sabina F. Kelly Catholic Charitable Fund (1991)  
 Edmund H. & Mayotta S. Kendrick Fund (1986)  
 \*Keogh Family Fund (2000)  
 \*Khudari Fund (2005)  
 \*New Beginnings/Kidder Hildner Fund (2004)  
 \*Kidder SBSM (Strong Body, Strong Mind) Fund (2005)  
 \*Kidder Smith Fund (2003)  
 \*M. R. Kidder Charitable Fund (2004)  
 KJN Family Fund (1997)  
 Kluchman Family Fund (1997)  
 Allen and Elizabeth Kluchman Fund (1997)  
 Klureza Family Fund (1997)  
 \*Knopf Family Charitable Fund (2004)  
 Pamela Kohlberg Fund (1995)  
 Kopacz Charitable Gift Fund (2003)  
 Stephen P. Koster Fund (1985)  
 \*Kravitz Family Fund (1993)  
 Anna Krezwick Fund (2002)  
 \*Raju and Melanie Kucherlapati Fund (2004)  
 Clara K. Kupferschmid Childrens' Fund (1998)  
 \*G. Barrie Landry Fund (2005)  
 Barbara Lee Family Foundation Fund (2004)  
 \*Thomas E. & Barbara B. Leggat Fund (1986)  
 C. Martin Leinwand Fund (1986)  
 Colman & Carol Levin Fund (2000)  
 \*Levine Family Charitable Fund (2003)  
 Joan & Theodore Levitt Family Fund (2000)  
 Charlotte Ruth Lewis Fund (1998)  
 Edward Bernard Roland Lewis Fund (1998)  
 Southard Lippincott Fund (1996)  
 Ann C. Livingston Fund (2001)  
 Ann C. Livingston Current Use Fund (2001)  
 John S. Llewellyn, Jr. Community Assistance Fund (1996)  
 LMG Fund (1997)  
 Joan Locatelli Foley Memorial Fund A (1997)  
 Joan Locatelli Foley Memorial Fund D (1997)  
 \*GC & JW Lodge Fund (2000)  
 \*Lord-Buck Fund (1996)  
 \*Lovett-Woodsum Family Fund (1998)  
 \*Bruce Lunder Fund (1982)  
 Donald J. & S. Kelley MacDonald Charitable Fund (1998)  
 Magic Penny Fund (1997)  
 Mahoney Family Fund (1983)  
 William G. Markos Fund (1982)  
 Evelyn A. Marran Fund (1983)  
 Martin Fund (1998)  
 \*Sydell and Edward I. Masterman Fund (1997)  
 \*Mayel Fund (1982)  
 Richard & Judith McGinnis Fund (1999)  
 Eleanor P. McIntyre Fund (2001)  
 McNeill Family Fund (1997)  
 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)  
 \*Menna/Remien Fund (1999)  
 Barbara Putnam Metcalf & Robert Treat Paine Metcalf Fund (1998)  
 \*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)  
 Joseph Morton Miller Family Fund (1998)  
 \*Gabrielle J. Miller Donor Advised Fund (2004)  
 \*Anita L. Mishler Education Fund (1983)  
 Moccasin Brook (2000)  
 Molino Family Fund (2003)  
 Monadnock Fund (2002)  
 Tallulah Morgan Fund (1980) for educational purposes for the black community in Boston, in part for scholarships  
 Morris Advised Fund (2000)  
 \*Sykes Moyer Fund (2005)  
 \*Muddy Pond Trust Fund (1994)  
 \*David G. Mugar Fund (1998)  
 \*Mullen Family Fund (2001)  
 \*Munger Family Fund (2001)  
 \*Murray Hill Charitable Fund (1995)  
 Musinsky/Krieger Fund (1996)  
 \*Myrtle Field Fund (2004)  
 Mystic Harmony Fund (2000)  
 Leslie & Sandra Nanberg Charitable Foundation Fund (2001)  
 Narnia Fund (1986)  
 \*Tami E. Nason & Kent A. Lage Fund (2005)  
 Jean F. and David G. Nathan Fund (1986)  
 Scott A. Nathan Fund (2001)  
 \*Neumann Family Charitable Account Fund (2003)  
 \*North Conway Institute Fund (2001)  
 Chad & Lia Novotny Fund (2002)  
 Novotny/Ramirez Donor Advised Fund (2002)  
 Novotny/Swahnberg Fund (1997)  
 Ohrn Family Fund (2000)  
 Ones Fund (2004)  
 Richard T. O'Rourke Fund (1988)  
 \*Orpheus Fund (2002)  
 Palisades Fund (1986)  
 \*Morgan Palmer Charitable Fund (1982)  
 John J. Pappenheimer Fund (1995)  
 Parker Family Fund (2000)  
 \*Field Parker Fund (1996)  
 Richard J. Parker and Donna K. Sherman Charitable Fund (2003)  
 \*Partnership Fund in honor of Anna Faith Jones (2001)  
 Alfred Nash Patterson Foundation for the Choral Arts Fund (1979) for the encouragement of composition and performance of new works of choral music and for the support of choral group activities  
 Payne's Creek Fund (2001)  
 \*Payson Family Fund (2000)  
 Peeler/Kellogg Fund (1999)  
 Samuel Perkins and Nancy Reed Fund (1996)  
 Sheila and Sara Perkins Fund (1996)  
 Perkins Improvements Fund - William (1996)  
 John A. Perkins, Jr. Fund (2000)  
 John & Lydia Perkins Fund (1999)  
 Robert C. Perkins Fund (2000)  
 \*Thomas Perls Fund (2004)  
 \*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)  
 Pitts Family Fund (1997)  
 Renata Poggioli Fund (1991)  
 Pokross/Gill Family Fund (1996)  
 Pool Family Fund (1997)  
 \*William Townsend Porter Fund (1998)

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)  
 Thomas & Mary Prince Family Fund (2000)  
 \*Sue and Bernie Pucker Fund (2002)  
 Peg Pyne Fund for Handicapped Access  
 (1985) to make congregations accessible  
 to handicapped worshippers  
 Quid Nunc Fund (2001)  
 \*Quinn-Jacobs Family Fund (1992)  
 Sidney R. & Esther V. Rabb Family Fund  
 (1983)  
 Barbara & Yale Rabin Fund (2002)  
 \*Radtke Family Fund (1996)  
 \*Emma W. Ramstad Fund (1998)  
 \*Otto W. Ramstad Fund (1998)  
 Bessye Bedrick Ravelson Fund (2003)  
 \*Raytheon Company Matching Gifts for  
 Education Fund (2001)  
 Gene Record Fund (2002)  
 Sara Delano Redmond Fund (1996)  
 Robert B. Reich Fund (2000)  
 \*Remmer-Fox Family Fund (1995)  
 Renaissance Fund (1998)  
 Reno Family Charitable Foundation (1998)  
 \*RETQ Fund (2001)  
 Edward S. Reynolds Memorial Fund (1984)  
 \*Russell & Carla Ricci Fund (1985)  
 \*Rich Florin Family Fund (2005)  
 \*Riptide Fund (2002)  
 Jonathan Rizzo Memorial Foundation Fund  
 (2001)  
 Thomas Roberts Fund (1995)  
 \*Roberts-Belove Fund (2004)

Robynhood Thanksgiving Fund (2002)  
 \*Rodgers Community Fund (2004)  
 \*Rogers Family Fund (2000)  
 Rosedune Fund (1970) especially for  
 educational and cultural programs,  
 primarily for children  
 \*Andrew L. & Leslie (George) Ross Fund  
 (2003)  
 Rotten Dock Fund (1988)  
 \*Roy/Thompson Family Fund (2000)  
 \*Dr. Jordan S. Ruboy Charitable Fund  
 (1998)  
 Russell-Oliver Family Fund (1997)  
 \*Rust Bowl Fund (1987) for the benefit of  
 cultural arts, including theatre  
 Robert Sachs & Caroline Taggart Gift Fund  
 (1998)  
 \*Risha C. and Paul A. Samuelson Fund  
 (1982)  
 Kazanjian Sargeant Fund (1996)  
 Schawbel Family Fund (1995)  
 \*Margaret M. Schmidt and Kenneth J.  
 Danila Fund (2004)  
 Schott Fund (1999)  
 \*Schumann Family Fund (2005)  
 Joel Schwartz Family Fund (2000)  
 \*Charles S. and Zena A. Scimeca Charitable  
 Fund (2004)  
 \*Sea Street Fund (2004)  
 Francis P. Sears Scholarship Fund (1973)  
 \*Gerald Segel Fund (1981)  
 \*Seim Fund (2003)  
 September Fund (2000)  
 \*Norman J. & Maryellen S. Shachoy Fund  
 (1997)  
 \*Shadow Lake Children's Fund (2002)  
 Shames/Egasti Fund (1991)  
 Shapiro/Fleishman Fund (1999)

Shawkemo Fund (2000)  
 Sherborn Fund (1997) for the benefit of  
 charitable organizations, activities, and  
 residents of Sherborn, Mass  
 \*Sherman Family Foundation Fund (2005)  
 William U. & J.W. Shipley Fund (2001)  
 Shoe Box Foundation Fund (2004)  
 \*Jean Karpas Siegel Fund (1994)  
 \*Ellen L. Simons Fund (1997)  
 63 Marlborough Street Fund (1984)  
 Skylight Fund (2000)  
 Ellin Smalley Fund (1987)  
 Austin & Susan Smith Fund (1999)  
 Walter A. & Hope Noyes Smith Fund (1985)  
 J. Alper Smith Fund (1996)  
 Clark R. Smith Fund (1990)  
 \*Snowden - Trimmier Family Fund (2002)  
 \*Social Venture Partners - Boston Fund  
 (2001)  
 Society of Women Engineers-Boston Fund  
 (1996)  
 \*Somerville Fund (1996)  
 Nancy and George Soule Family Fund  
 (1997)  
 \*Spector Fund (2001)  
 \*David F. Squire Family Fund (1997)  
 \*Stamps Family Fund (1998)  
 Aaron Stein Fund for Group Psychotherapy  
 (1983)  
 Harvey & Shirley Stein Fund (1999)  
 Stewart-Holtzman Fund (2001)  
 Stone Charitable Fund (1999)  
 Stone Family Fund (1999)  
 \*Elihu and Lillian Stone Family Charitable  
 Fund (2003)  
 James M. and Cathleen D. Stone  
 Foundation (1995)  
 Albert and Elizabeth Stone Fund (1993)

Stonehill Enrichment Fund of the Ames Free Library (1994)  
 \*Robert Strange Family Fund (2003)  
 Sugarman Fund (1982)  
 \*Charles Sugnet Fund (1998)  
 \*Joshua Sugnet Fund (1998)  
 Nancy L. Sullivan Fund (1989)  
 Diane Sullivan-Villano Fund (1998)  
 \*Sunrise Fund (1993)  
 Sustainable Future Fund (2003)  
 Sylvan Fund (1985)  
 TechFoundation Fund (2002)  
 \*Tempero Family Fund (2002)  
 Thomsen Family Fund (2000)  
 \*Susan and Michael Thonis Fund (2005)  
 \*Tiare Fund (1996)  
 \*Scott and Jennifer Tobin Charitable Fund (2004)  
 \*Topol Family Fund (1991)  
 Gerard B. Townsend Charitable Fund (1995)

\*Trefler Fund (1997)  
 Thomas & Lois Valeo Fund (1982)  
 Valette Family Charitable Fund (2001)  
 Joseph Bishop Van Sciver Fund (1861-1943) (1997)  
 Vendome Firefighters Scholarship Fund (1992) merit scholarship for a Suffolk University student who is a child or a descendant of a Boston Firefighter  
 Vizzini Fund (1997)  
 M. Volpe Kluchman Fund (2005)  
 \*Ann & Robert von der Lippe Fund (1997)  
 \*JH & EV Wade Fund (1990)  
 James and Margaret Wade Fund (1997)  
 Wainwright Bank Community Fund (1998)  
 \*Walker Fund (1998)  
 Ruth & Henry Walter Fund (1982)  
 J. H. & C. K. Walton Fund (1986)  
 Warner Charitable Gift Fund (2000)  
 Waterfield Fund (2002)

Sally Sutfenfield Webb Fund (1998)  
 \*Weiss Charitable Fund (2004)  
 \*Jack and Kathleen Welch Fund (2001)  
 \*Lois & David Weltman Fund (1991)  
 Annie Evans White Memorial Fund (1970) for the benefit of needy persons of Winchendon, Massachusetts  
 Frank & Jean White Fund (2001)  
 \*Janet White Memorial Scholarship Fund (2004)  
 Guy and Maggie Wickwire Fund (1989)  
 \*Benjamin J. Williams, Jr. Fund (1986)  
 \*David B. Williams Fund (1986)  
 \*Hope A. Williams Fund (1986)  
 \*Natica R. Williams Fund (1986)  
 \*Ralph B. & Margaret C. Williams Fund (1985)  
 \*Ralph B. Williams, II Fund (1986)  
 Winkler Family Foundation Fund (2001)  
 \*Owen Thomas Winship Fund (1998)

\*Samuel Lee Winship Fund (1998)  
 \*Wesley L. Winship Fund (1998)  
 \*Jesse Winship-Freyer Fund (1998)  
 Winsor Foundation Fund (1989)  
 \*Jack & Judith Wittenberg Fund (1997)  
 Howard L. Wolf Memorial Fund (1981)  
 \*Hertha & John Wolkowicz Charitable Fund (2000)  
 Karin E. Wood Fund (1993)  
 Michael N. Wood Fund (1996)  
 Paul & Eleanor Young Fund (1988)  
 \*Zabin Charitable Fund (2001)  
 Zarkin Family Fund (2001)  
 Sylvia and Robert Zell Fund (1988)  
 \*Emily Zofnass Fund (1998) for the benefit of animal related causes, including organizations which have their primary purpose insuring quality care for domesticated animals  
 T. Zouikin Charitable Fund (2003)

### *Support Organizations and Other Special Funds*

Bruce J. Anderson Foundation, Inc. (1980) for preventative programs, direct services and new initiatives in the field of environmental protection, historic and archival preservation, the arts and mental health located in either Cape Ann or the Nashoba Valley  
 James R. Bancroft Trust (1953) income to be paid to the Boston Foundation for general purposes

Boston's Fourth of July Foundation, Inc. Fund for the Environment (formally known as 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 & Natural Areas (1994)  
 Bessie P. Goldsmith Fund (1994) for the benefit of the Andover Village Improvement Society  
 Hollis D. Leverett Memorial Fund (1994) for the planting and upkeep of trees that protect and encourage wild bird life

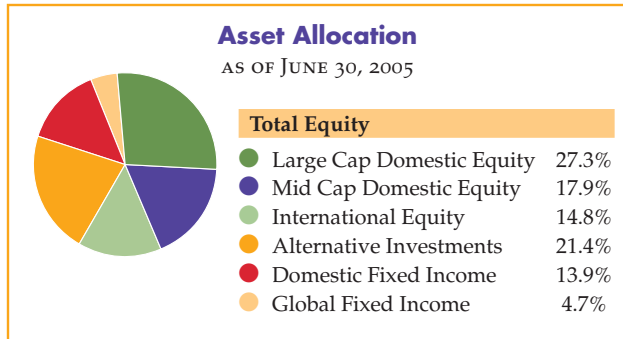
Sheep Pasture Fund (1994) for the benefit of Natural Resources Trust of Easton, Massachusetts  
 Horace Moses Foundation (1995) to support Junior Achievement  
 James M. and Cathleen D. Stone Foundation (1994)

# 2005 Financials

The Boston Foundation has a mandate both to fulfill its role as Greater Boston's community foundation today—by maximizing grant 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 both these objectives.

## Fund for the 21st Century

The Foundation's assets are professionally managed in a pool known as the Fund for the 21st Century. The Fund has a long-term time horizon, and is structured with the



objective of achieving returns in excess of the targeted spending policy, costs and inflation. Total assets as of June 30, 2005 were \$686 million, up from \$647 million in the prior year.

## Financial Oversight

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

The Boston Foundation takes a total return approach to investment management under the Uniform Management of Institutional Funds Act (UMIFA). Total return is a term used to describe the total change in fund value over a given time period

resulting from both interest and dividends, and capital appreciation (realized and unrealized gains). Investing for total return, as opposed to just investing for interest and dividends, allows the Foundation to capture a portion of the historically higher appreciation in the equity and equity-like markets for grantmaking purposes.

<b>Performance</b>			
AS OF JUNE 30, 2005			
	1 Year	3 Year	5 Year
Total Fund	9.0%	10.3%	2.1%
Policy Benchmark*	8.8%	9.3%	1.0%
S&P 500 Index	6.3%	8.3%	-2.4%

\*Policy benchmark is a composite of the individual benchmarks used to measure each manager's performance. Past performance is not a guarantee of future results.

## The Spending Rate

By using a spending rate, the Foundation helps to ensure that the charitable funds will be protected for the future, while continuing to have the most impact today. The 2005 spending rate was 5% for all endowed Boston Foundation Funds. In order to smooth out the fluctuations in the financial markets, the 5% is applied to a sixteen-quarter average. Beginning in Fiscal Year 2006, the Boston Foundation will increase its spending rule to 6%, which will add \$2 million for grants.

## Socially Responsible Investing and Proxy Voting

The Boston Foundation was the first major community foundation in the country to actively promote its values and expectations around the areas of corporate governance by exercising its right to proxy voting for its investments. Proxy voting is the basic mechanism through which shareholders can influence the governance and behavior of corporation in which they hold stock. The Foundation focuses its proxy voting on key issues including the environment, community well-being, diversity and equity and good corporate governance.

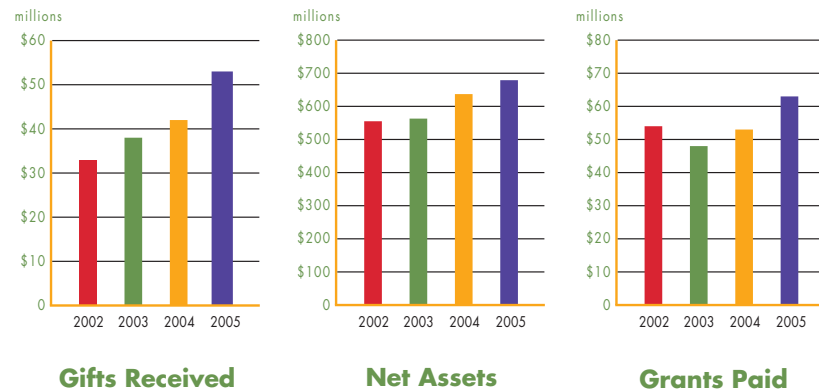
## Audited Financial Statements

The Foundation's financial statements were prepared under strict policies and procedures overseen by the Foundation's independent Audit Committee and, ultimately, the Board of Directors. The statements were audited by KPMG, LLP. KPMG has issued an unqualified opinion on the financial statements for the year ended June 30, 2005. A summary of the financial statements is shown here, but copies of the full financial statements are available on our web site at [www.tbf.org](http://www.tbf.org) or by calling the Foundation's offices at 617-338-1700.

## Expense Control

The Foundation's management and Board of Directors take careful steps to ensure that the operating expenses are kept as low as possible. Over the past four years, operating expenses have remained at an average of 1.0 % of total assets.

### Increased Growth from 2002 through 2005



**Gifts Received**

**Net Assets**

**Grants Paid**

Gifts to the Boston Foundation have steadily and significantly grown over the last four years, increasing the Foundation's total assets to \$686 million. As a result, in 2005, the Foundation set an all-time record for grants paid, at more than \$63 million.

## 2005 Summary Financial Statements

### Assets:

Receivables	\$ 19,999,694
Investments	656,154,771
Other	9,969,866
Total Assets	\$ 686,124,331

### Liabilities & Net Assets:

Accounts Payable	\$ 2,419,478
Grants Payable	1,561,652
Other	3,154,806
Net Assets	678,988,395
Total Liabilities & Net Assets	\$ 686,124,331

### Revenues:

Contributions	\$ 53,397,223
Net Investment Return	60,791,416
Total Revenues	\$ 114,188,639

### Grants & Expenses:

Grants	\$ 63,005,644
Program Support	2,743,288
Operating Expenses	6,671,361
Total Grants & Expenses	\$ 72,420,293

Change in Net Assets	\$ 41,768,346
Net Assets Beginning of Year	\$ 637,220,049
Net Assets End of Year	\$ 678,988,395

### Editor's Note

This Annual Report is the 20th created by the editorial team of Barbara Hindley, Kate Canfield, and Richard Howard. It has been our honor, over the years, to reflect the changing character of the Boston Foundation and the community it serves. We want to thank all of the people who have been photographed and quoted and profiled in these pages over the years—and Mary Jo Meisner for her guidance and support over the last four years.

For this 90th Anniversary Annual Report, thanks also go to the writer Patricia Brady for her research and writing about the early days of the Boston Foundation over the years. Thanks also to historian Susan Wilson for her research into the year 1915 in Boston.

We are deeply grateful to everyone who helped to identify photos from the early 20th century in Boston in their respective collections:

Lorna Condon and Sally Hinkle at Historic New England; Aaron Schmidt at the Boston Public Library's Print Department; Jacalyn Blume at the Schlesinger Library, Radcliffe Institute, Harvard University; Christopher Carden at the Bostonian Society's Library and Special Collections; and Sally Pierce at the Boston Athenaeum. All of these institutions play a crucial role in documenting and protecting Boston's rich history.

### Photo Acknowledgments

*Cover photos:* Men in Shoe Factory, Historic New England; African Americans on Steps of Townhouse, Historic New England; Female Student Reading, Boston Public Library; Men and Women in Drawing Class, Schlesinger Library. *Photos pages 4 and 5:* Park Street from the Common, 1915, Boston Athenaeum; Infantile Paralysis, Boston Public Library; Immigrants, Boston Foundation Archives; William Monroe Trotter, Boston Foundation Archives; Suffragists Marching and Girl Making Paper Flowers, Schlesinger Library; Custom Tower Under Construction, Boston Public Library; Babe Ruth in 1915, courtesy of Baseball Antiquities, Ltd. *Page 9*, North End Savings Bank, Bostonian Society; *page 16*, Boy Carving Duck, *page 18*, Teacher and Students, and *page 20*, Men and Women in Drawing Class, all Schlesinger Library; *page 21*, Female Student Reading, Boston Public Library; *page 23*, Men Learning Morse Code, Schlesinger Library; *page 25*, Women Sewing, Schlesinger Library; *page 26*, African-Americans on Steps, Historic New England; *page 28*, Laundry Drying, Historic New England; *page 31*, Girl in Front of Bakery, Schlesinger Library; *page 32*, Men Posed in Shoe Factory, Historic New England; *page 35*, Children with Kitten, Boston Foundation Archives; *page 36*, Nurse with Children's Ambulance, Boston Foundation archives; *page 37*, Boys Making Planes, Schlesinger Library; *page 38*, Children Playing Instruments, Boston Public Library; *page 39*, Boys Gardening, Schlesinger Library; *page 40*, Trolley Car, *page 41*, Women Marching, *page 42*, Boys Exercising, *page 49*, Women in Office, all Schlesinger Library; *page 53*, Waterfront, Boston Public Library; *page 60*, Girl at Easel, Boston Foundation Archives; *page 64*, Young Women in Class and *page 67*, Audience of Immigrants, both Schlesinger Library; *page 70*, Children on Trunk, Boston Foundation Archives; *page 71*, Woman with Camera, Schlesinger Library. Note: In some cases, photos were available through the Boston Foundation's photo archives. We apologize to the original sources of those photos if they are not listed.



### Acknowledgments

*Editor* Barbara Hindley  
*Designer* Katherine Canfield  
*Photographer* Richard Howard  
*Printed by* Kirkwood Printing

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