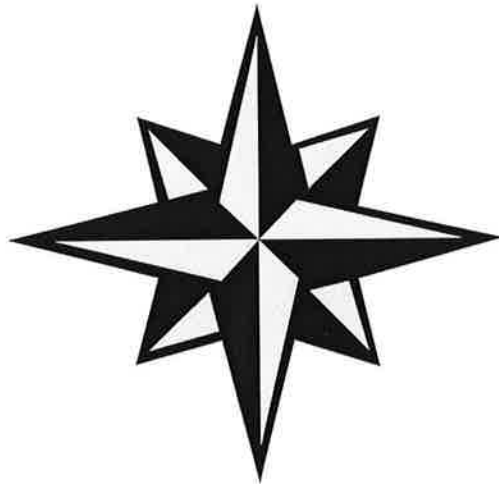


**CABOT FAMILY CHARITABLE TRUST**

**ANNUAL REPORT 2011**



**70 Federal Street  
Boston, Massachusetts 02110  
[www.cabwel.com](http://www.cabwel.com)**

**CABOT FAMILY CHARITABLE TRUST  
ANNUAL REPORT 2011**

In 2011, the Cabot Family Charitable Trust awarded grants totaling \$1,500,000 to 71 organizations. Grant awards were made to organizations working in arts and culture, civic and public benefit, education and youth development, environment and conservation, and health and human services, mostly in Boston. In addition the Trust made several grants within these fields to organizations serving infants and young children, a new interest of the Trustees identified during strategic planning discussions. These grant awards continue the philanthropic legacy of Godfrey L. Cabot, who established the Trust in 1942.

The Cabot Family Charitable Trust received over three hundred eligible applications in 2011, similar to the previous year. Trustees make grant award decisions twice a year after reviewing recommendations prepared by the staff. Most grant awards are for one year. Our concept paper process continues to be popular, making the application process easier for applicants and more manageable for staff. Both trustees and applicants liked the streamlined format. We have made a few minor changes to the application cover sheet for clarification. Grant application guidelines are available at the end of this report or at [www.cabwel.com](http://www.cabwel.com), Philanthropy Overview.

Since the Cabot Family Charitable Trust maintains an open application process, staff and trustees meet frequently with nonprofit organizations operating in the city of Boston. Staff also participates in professional meetings and discussions on philanthropy and the nonprofit sector sponsored by local and national philanthropic associations.

The Cabot Family Charitable Trust's investment portfolio is managed by Fiduciary Trust. Trustees and staff review a monthly investment report, and investment guidelines are reviewed annually with Fiduciary Trust staff. The annual audit is conducted by Wolf & Co., P.C. Audit summaries are provided at the end of this report.

**TRUSTEES:**

**John G.L. Cabot, Chair**  
**Francis M. Bradley**  
**Jane C. Bradley**

**Edmund B. Cabot**  
**Mary Schneider Enriquez**  
**Greenfield Sluder**

**70 Federal Street**

**Boston, MA 02110**

## 2011 Grant Awards

### GRANT AWARD SUMMARY

ARTS AND CULTURE	\$255,000
CIVIC AND PUBLIC BENEFIT	\$60,000
EDUCATION AND YOUTH DEVELOPMENT	\$837,500
ENVIRONMENT AND CONSERVATION	\$95,000
HEALTH AND HUMAN SERVICES	<u>\$252,500</u>
	\$1,500,000

#### Arts and Culture

<b>Agassiz Baldwin Community Center f/b/o Maud Morgan Visual Arts Center</b>	<b>\$25,000</b>
To help with construction of a new free-standing arts center to serve residents of Cambridge	
<b>Boston Center for the Arts</b>	<b>\$25,000</b>
For repairs to protect Cyclorama as a historic site	
<b>Boston Lyric Opera</b>	<b>\$20,000</b>
For continued support of education and community programs for youth in collaboration with Wheelock Family Theater	
<b>Community Music Center of Boston</b>	<b>\$25,000</b>
To support the Centennial Campaign to strengthen programming and operations	
<b>Harvard University Art Museums</b>	<b>\$25,000</b>
For the study center portion of the renovation and expansion of the Harvard arts complex	
<b>Institute of Contemporary Art</b>	<b>\$20,000</b>
For teen programs, providing arts instruction and engagement for Boston teens	
<b>Isabella Stewart Gardner Museum</b>	<b>\$25,000</b>
To support the capital campaign	
<b>Museum of Science, Boston</b>	<b>\$60,000</b>
For the capital campaign to create a science and technology center	
<b>Music at Eden's Edge</b>	<b>\$5,000</b>
To introduce classical music to North Shore children	
<b>Peabody Essex Museum</b>	<b>\$15,000</b>
For the Community Partnership Program, providing subsidized museum visits to at-risk youth	

## 2011 Grant Awards

**Urban Arts Institute and the Massachusetts College of Art & Design** **\$10,000**  
For the Urbano Project, encouraging social change through collaborative and participatory community art and performance

**Total Arts and Culture** **\$255,000**

### **Civic and Public Benefit**

**Aero Club of New England** **\$10,000**  
For support of the Godfrey L. Cabot Award and luncheon

**Boston Ten Point Coalition** **\$25,000**  
To restore the Gang Mediation Initiative and Season of Peace Programs to promote community-based solutions for peace and public safety

**Friends of Mount Auburn Cemetery** **\$25,000**  
For construction of new greenhouse facilities

**Total Civic and Public Benefit** **\$60,000**

### **Education and Youth Development**

**America SCORES New England** **\$25,000**  
To work with the Boston Public Schools to provide afterschool soccer and literacy programming

**Associated Grantmakers** **\$20,000**  
For the Summer Fund to make outdoor and camping experience accessible to low-income and at-risk youth from Boston and neighboring communities

**Bessie Tartt Wilson Initiative for Children** **\$20,000**  
For operating support to strengthen early education and care for children through research, policy development, communication and advocacy

**Bikes Not Bombs, Inc.** **\$10,000**  
For the Leadership Development Pathway, where at-risk Boston youth learn employment skills and develop confidence working with trained mentors

**Boston Area Rape Crisis Center** **\$30,000**

## 2011 Grant Awards

To support the work of six local organizations committed to improving the lives of Greater Boston youth

**Boston Arts Academy Foundation** **\$12,000**  
For reading and writing instruction for students reading below high school level, and ongoing professional development for teachers in adolescent literacy

**Boston Children's Chorus** **\$25,000**  
To support choral programs for Greater Boston youth

**Boston Debate League** **\$30,000**  
For the "Go Deep" Initiative to build large debate teams and train teachers to use debate in the classroom in Boston's underserved public schools

**Boston Foundation, Inc.** **\$25,000**  
To support the StreetSafe Boston initiative

**Boston Landmarks Orchestra** **\$10,000**  
Funding for 2011 summer season of free concerts

**CAST, Inc. (Center for Applied Special Technology)** **\$30,000**  
To use innovative technology approaches to teaching algebra to struggling students in Boston area schools

**Cathedral High School** **\$25,000**  
To support the installation of a fire repression system

**Catholic Charitable Bureau of the Archdiocese of Boston f/b/o Teen Center at St. Peter's** **\$20,000**  
To provide education, enrichment, leadership development and recreational activities in the Bowdoin Geneva neighborhood

**CEDAC f/b/o Children's Investment Fund** **\$25,000**  
For a capital grants program for emergency and efficiency repairs to early childhood care and out-of-school time programs

**Center for Excellence in Education** **\$25,000**  
To support the Research Science Institute for high school students on the MIT campus

**Community Development Assistance Corporation f/b/o** **\$25,000**

## 2011 Grant Awards

### **Boston Schoolyard Initiative**

For operating a capital program to support transformation of Boston schoolyards into vibrant places for play and learning

### **Community Education Center**

**\$10,000**

For the Education for New Americans program

### **Community Rowing, Inc.**

**\$14,000**

For staff to support a new academic and sports afterschool program for Boston high school boys

### **Congregacion Leon de Juda f/b/o Boston Higher Education Resource Center**

**\$25,000**

For the Passport Program to help at-risk Latino and disadvantaged youth gain access to higher education

### **Educational Development Group, Inc.**

**\$12,500**

To support the Accelerated English Plus Program, providing intensive English language instruction for new immigrants

### **EdVestors**

**\$10,000**

For operating support for this program driving positive outcomes for students in the Boston Public Schools through targeted investment

### **Family Nurturing Center of Massachusetts f/b/o Smart from the Start**

**\$25,000**

To support ongoing family and child development programming in six communities, with special emphasis on Roxbury

### **Farnsworth Art Museum**

**\$20,000**

For teacher training and materials for the Enhanced Arts Education Classroom

### **Food Project, Inc.**

**\$11,000**

To support local youth programs teaching young people critical skills as they work together on farms and in neighborhoods

### **Friends of the Children - Boston**

**\$9,000**

For operating support for mentoring programs for at-risk youth in Boston

### **Friends of Young Achievers Pilot School**

**\$30,000**

For a special orientation program for students of the closed Agassiz School who will be

## 2011 Grant Awards

transitioning to Young Achievers in the fall

<b>Hull Lifesaving Museum</b>	<b>\$25,000</b>
To support the Maritime Apprentice Program for DYS-committed African-American and Latino young men	
<b>Huntington Theatre Company</b>	<b>\$20,000</b>
For education and outreach programming for teens and adults in the Boston area	
<b>Island Institute</b>	<b>\$30,000</b>
For a fund to honor Louis Cabot's service to the Island Institute that supports the Energy for Maine Project	
<b>Joseph M. Smith Community Health Center</b>	<b>\$20,000</b>
For the Mom and Baby Program, improving maternal and child health among vulnerable families in Allston/Brighton and Waltham	
<b>North Bennet Street School</b>	<b>\$25,000</b>
To help meet a challenge grant for the school's move to a new site in the North End	
<b>North Cambridge Catholic High School, Inc. aka Cristo Rey Boston High School</b>	<b>\$25,000</b>
To construct a science lab at the new Dorchester site	
<b>Opera Boston</b>	<b>\$10,000</b>
To support the Vocal Explosion Program for inner-city youth	
<b>Project STEP, Inc.</b>	<b>\$11,000</b>
To provide musically talented children from underrepresented Boston communities with comprehensive music instruction	
<b>Roxbury Preparatory Charter School</b>	<b>\$25,000</b>
For a capital campaign to accommodate school expansion	
<b>Sociedad Latina</b>	<b>\$25,000</b>
To support Mission Possible, a college and career pathway program for Latino high school students	
<b>Strategies for Children, Inc.</b>	<b>\$30,000</b>
For research, outreach and advocacy for high-quality accessible early education for all	

## 2011 Grant Awards

children

**Theatre Espresso** **\$8,000**

For the "Road to Tolerance" project in the Boston Public Schools

**WGBH** **\$35,000**

In support of the \$10 million capital campaign

**Young Audiences of Massachusetts** **\$25,000**

For Expanding Horizons Through Music, a program to address the literacy skill building needs of homeless preschool children in Dorchester

**Total Education and Youth Development** **\$837,500**

### **Environment and Conservation**

**Boston Harbor Island Alliance** **\$25,000**

Over two years to help build the Harbor Park Pavilion on the Rose Kennedy Greenway, a landside gateway to the Boston Harbor Islands

**Conservation Law Foundation** **\$20,000**

To upgrade and modernize Boston's sewer and storm water infrastructure and address critical public health and water quality issues

**Gulf of Maine Research Institute** **\$25,000**

To support Massachusetts fishing communities in shifting to community-based fishing cooperatives to better manage groundfish stocks while preserving their livelihood

**Nature Conservancy in Maine** **\$25,000**

For continued support of the Gulf of Maine fishing permit acquisition program

**Total Environment and Conservation** **\$95,000**

### **Health and Human Services**

**Boston's Higher Ground** **\$25,000**

To support a parenting program that helps to insure that newborns in the Warren Gardens community have a healthy and supportive environment

**Cambridge Affordable Housing Corporation** **\$30,000**



## 2011 Grant Awards

For an alumni program to extend the support provided to young parents and their babies beyond the intensive program of Baby University

**Community Day Center of Waltham** **\$8,000**

For general operating support to address the needs of homeless and very poor adults in the Waltham area

**Family to Family Project, Inc.** **\$10,000**

For operating support to provide financial assistance to families who are homeless or at risk of becoming homeless

**Food For Free Committee, Inc.** **\$7,500**

For continued support of the Produce Rescue and Distribution Program serving seventy-nine local food programs

**Full Frame Initiative , Inc.** **\$20,000**

To create a tool kit that will help community-based social service organizations to improve outcomes for their clients

**Gaining Ground** **\$12,000**

To educate farmers' assistants by sending them to national conferences, including Farm Based Education Association

**Haley House, Inc.** **\$10,000**

For general support of the Bakery Café in Roxbury's Dudley Square

**Harvard School of Public Health** **\$30,000**

For continued support of the Healthy Beverage Initiative, tackling childhood obesity through promotion of healthy beverage choices at home

**Health Resources in Action** **\$30,000**

To support the Family Childcare Provider Environmental Health Training Project

**LIFT Boston** **\$25,000**

To support the Family Economic Stability Program working with one hundred homeless families to promote economic stability and children's academic achievement

**Massachusetts Citizens for Children, Inc.** **\$25,000**

For "Real Men Don't Shake Babies", a statewide public education campaign to educate young men about the dangers of Shaken Baby Syndrome

**2011 Grant Awards**

**Robert F. Kennedy Children's Action Corps** **\$20,000**  
To support expansion of detention diversion services and juvenile reform at Suffolk County  
Juvenile Court

**Total Health and Human Services** **\$252,500**

# The Cabot Family Charitable Trust

## Statements of Assets and Net Assets

December 31, 2011 and 2010

	<u>2011</u>	<u>2010</u>
Assets		
Cash and cash equivalents	\$ 442,243	\$ 1,562,772
Investments, at fair value	<u>36,047,737</u>	<u>36,902,446</u>
	<u>\$36,489,980</u>	<u>\$38,465,218</u>
Net Assets		
Unrestricted net assets	<u>\$36,489,980</u>	<u>\$38,465,218</u>

See independent auditors' report and notes to financial statements.

# The Cabot Family Charitable Trust

## Statements of Revenue, Expenses and Changes in Net Assets

Years Ended December 31, 2011 and 2010

	2011	2010
<b>Revenue:</b>		
Net realized and unrealized gain (loss)		
on investments	\$ (940,701)	\$ 3,354,931
Dividends and interest	913,963	802,529
Other income	730	3,189
Net investment income (loss)	(26,008)	4,160,649
<b>Expenses:</b>		
Administrative costs - Cabot-Wellington, LLC	241,783	236,400
Professional fees	23,445	22,250
Investment fees	142,543	132,443
Membership dues	6,050	12,695
Miscellaneous	2,397	3,170
Rent	25,753	24,718
Travel, conferences and meetings	1,259	1,562
	443,230	433,238
Contributions	1,500,000	1,400,000
Federal excise tax	6,000	23,000
Total expenses	1,949,230	1,856,238
Increase (decrease) in net assets	(1,975,238)	2,304,411
Unrestricted net assets at beginning of year	38,465,218	36,160,807
Unrestricted net assets at end of year	\$ 36,489,980	\$ 38,465,218

See independent auditors' report and notes to financial statements.

**Trustees: Frank Bradley, Jane C. Bradley, Edmund B. Cabot,  
John G.L. Cabot, Mary Schneider Enriquez, Greenfield Sluder**

### **Grant Program Summary and Eligibility Requirements**

Established in 1942 by Godfrey L. Cabot, the Cabot Family Charitable Trust makes grant awards in arts and culture, education and youth development, environment and conservation, health and human services, and civic and public benefit. Grant awards are made in the city of Boston and contiguous communities, as well as to organizations in which the Cabot family has philanthropic interest. Applications to the Trust are accepted twice per year for review by the trustees.

Grant applications are reviewed at trustee meetings in May and November. Deadlines for grant applications are February 1 and September 1. If those dates fall on a weekend or holiday, applications are due the next business day.

Nonprofit organizations with 501(c)(3) status are eligible for support. The Cabot Family Charitable Trust does not support sectarian programs of religious institutions, fraternal organizations, event sponsorships or matching gift programs. The Trust does not make awards to individuals. Support for summer camp programs is channeled through the Summer Fund sponsored by Associated Grant Makers. The Cabot Family Charitable Trust Annual Report lists recent grant awards at [www.cabwel.com](http://www.cabwel.com).

### **Grant Program Policy and Review Criteria**

The Cabot Family Charitable Trust will consider grant applications for general support, support for specific programs and activities and for capital campaigns. While most grant awards are for one year, the trustees may award multi-year funding for capital campaigns and long-term organizational development. Organizations considering a capital campaign request must apply for support by February 1 in any year. Capital requests will not be considered in the fall.

Grant awards range from \$5,000-\$50,000 for a one-year period. After Cabot Family Charitable Trust staff researches and reviews grant applications, the trustees make the final decision on all grant awards.

Applications recommended for funding meet the following criteria:

- Reflect Cabot family interests and provide benefits to communities and organizations that have been supported by the family's philanthropy.
- Extend important services to individuals and groups not served adequately through other programs and institutions.
- Manage change by assessing community needs and developing programs to meet emerging needs.
- Promote productive cooperation and full use of resources by nonprofit organizations and community groups.
- Test new approaches to problems or adapt solutions that have been successful elsewhere.

### **Grant Application Process**

Applicants must begin by submitting a concept paper, using the format found on this Web Site, by February 1 or September 1. The trustees will notify applicants by email if further information is needed to complete their consideration of a request. Applicants will be notified by email on a rolling basis if their requests will not be funded. Concept papers must be emailed or postmarked by the deadline date to:

Cabot Family Charitable Trust  
70 Federal Street, (7<sup>th</sup> floor)  
Boston, MA 02110

**Executive Director: Katherine S. McHugh**  
**617.226.7505 kmchugh@cabwel.com**

**Cabot Family Charitable Trust  
Concept Paper**

<b>Organization</b>	<b>Fiscal agent (if applicable)</b>
Name and Address:	Name and Address:
Phone:	Phone:
Web address:	Web address:
Executive Director Name:	Executive Director Name:
Title:	Title:
Phone:	Phone:
Email:	Email:
Budget: \$ _____ Yr: _____ (Attach a summary)	Budget: \$ _____ Yr: _____ (Attach a summary)
Info from audit/fin. review for _____(yr.)	Info from audit/fin. review for _____(yr.)
Revenues: \$	Revenues:
Expenses: \$	Expenses:
Net assets: \$	Net assets:
501(c)3 – Attach IRS letter	501(c)3 – Attach IRS letter

Primary contact for request:

Name  
Phone

Title  
Email

Organization description and Mission (up to two sentences, including age of the organization):

Amount requested (attach program/capital budget):  
Purpose of request (one sentence):

Prior support from Cabot Family Charitable Trust:  
Signature:

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Executive Director (fiscal agent)

In a maximum of three pages, please address the following topics briefly, either in a continuous narrative or topic by topic:

Describe the need that your program will address.

Summarize the population to be served by the program.

Describe how the program will address that need.

Describe the project or program, including a summary of plans and activities, personnel needed to carry it out, and collaborations or partnerships involved, if applicable.

Describe what you hope to achieve and how you will know that you are succeeding.

If necessary, please provide any needed explanation to the attached program/capital budget.

Please include a summary of who else is funding the program, committed and pending.

(This can be added to the program/capital budget page, if you prefer.)

Describe your plans for long term sustainability of the project or program.

Attachments required:

- IRS 501c(3) letter (for fiscal agent, where appropriate)
- Operating budget summary (for fiscal agent, where appropriate)
- Complete program/capital budget, if different