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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

**Note.** The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052  
**2009**

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity






☐ Final return

☐ Amended return

☐ Address change

☐ Name change










Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE HYAMS FOUNDATION INC		A Employer identification number 04-6013680	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 50 FEDERAL STREET 9TH FLOOR		B Telephone number (see page 10 of the instructions) (617) 426-5600	
	City or town, state, and ZIP code BOSTON, MA 02110		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 131,386,051		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	25,000			
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	74,584	74,584		
	4 Dividends and interest from securities. . . . .	1,414,901	1,414,901		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-3,126,136			
	b Gross sales price for all assets on line 6a 31,488,479				
	7 Capital gain net income (from Part IV , line 2) . . . .		0		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	-1,611,651	1,489,485		
	13 Compensation of officers, directors, trustees, etc	330,905	51,415		279,490
	14 Other employee salaries and wages . . . . .	548,701	29,973		518,728
	15 Pension plans, employee benefits . . . . .	203,375	10,602		192,773
	16a Legal fees (attach schedule) . . . . .	 5,275	0		5,275
	b Accounting fees (attach schedule) . . . . .	 53,434	25,995		27,439
	c Other professional fees (attach schedule) . . . . .	 241,959	239,341		2,618
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see page 14 of the instructions)	 113,882	0		0
	19 Depreciation (attach schedule) and depletion . . . .	8,494	0		
	20 Occupancy . . . . .	150,239	6,048		144,191
	21 Travel, conferences, and meetings . . . . .	17,704	0		17,704
	22 Printing and publications . . . . .	2,625	0		2,625
	23 Other expenses (attach schedule) . . . . .	 688,905	625,504		63,401
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	2,365,498	988,878		1,254,244
	25 Contributions, gifts, grants paid . . . . .	6,938,994			4,933,994
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	9,304,492	988,878		6,188,238
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-10,916,143			
	b <b>Net investment income</b> (if negative, enter -0-)		500,607		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II


Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1Cash—non-interest-bearing . . . . .	559,773	201,316	201,316
	2Savings and temporary cash investments . . . . .	5,410,639	1,735,903	1,735,903
	3Accounts receivable ▶ <u>180,102</u>			
	Less allowance for doubtful accounts ▶ _____	364,460	180,102	180,102
	4Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5Grants receivable . . . . .			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .			
	7Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use . . . . .			
	9Prepaid expenses and deferred charges . . . . .	23,037	23,037	23,037
	10aInvestments—U S and state government obligations (attach schedule)			
	bInvestments—corporate stock (attach schedule) . . . . .	38,853,581	 60,748,475	60,748,475
	cInvestments—corporate bonds (attach schedule). . . . .	30,188,420	 22,056,014	22,056,014
	11Investments—land, buildings, and equipment basis ▶ _____			
Liabilities	Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans . . . . .			
	13Investments—other (attach schedule) . . . . .	39,645,800	 46,341,325	46,341,325
	14Land, buildings, and equipment basis ▶ <u>208,357</u>			
	Less accumulated depreciation (attach schedule) ▶ <u>183,478</u>	33,373	 24,879	24,879
	15Other assets (describe ▶ _____)	 75,000	 75,000	 75,000
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	115,154,083	131,386,051	131,386,051
	17Accounts payable and accrued expenses . . . . .	73,050	28,467	
	18Grants payable . . . . .	935,000	2,940,000	
	19Deferred revenue . . . . .			
	20Loans from officers, directors, trustees, and other disqualified persons			
	21Mortgages and other notes payable (attach schedule) . . . . .			
	22Other liabilities (describe ▶ _____)	 0	 195,000	
	23Total liabilities (add lines 17 through 22) . . . . .	1,008,050	3,163,467	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24Unrestricted . . . . .	21,017,549	23,571,828	
	25Temporarily restricted . . . . .	14,691,295	26,213,567	
	26Permanently restricted . . . . .	78,437,189	78,437,189	
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds . . . . .			
	28Paid-in or capital surplus, or land, bldg , and equipment fund			
	29Retained earnings, accumulated income, endowment, or other funds			
	30Total net assets or fund balances (see page 17 of the instructions) . . . . .	114,146,033	128,222,584	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	115,154,083	131,386,051	

Part III

Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return) . . . . .	1	114,146,033
2	Enter amount from Part I, line 27a . . . . .	2	-10,916,143
3	Other increases not included in line 2 (itemize) ▶  _____	3	24,992,694
4	Add lines 1, 2, and 3 . . . . .	4	128,222,584
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	128,222,584

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
1 a	various	P	2008-12-31	2009-12-31
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 31,488,479		34,614,615	-3,126,136
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-3,126,136
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-3,126,136
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income )

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No  
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	8,089,994	147,061,344	0 055011
2007	7,239,734	159,353,266	0 045432
2006	6,935,768	145,765,115	0 047582
2005	5,968,605	137,008,095	0 043564
2004	6,843,186	115,919,974	0 059034

2 Total of line 1, column (d). . . . .	2	0 250623
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . .	3	0 050125
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5. . . . .	4	114,658,905
5 Multiply line 4 by line 3. . . . .	5	5,747,278
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	5,006
7 Add lines 5 and 6. . . . .	7	5,752,284
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	6,294,991

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1				
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)				
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	5,006	
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0	
3		Add lines 1 and 2. . . . .		3	5,006	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	5,006	
6		Credits/Payments				
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	100,000		
b		Exempt foreign organizations—tax withheld at source . . . . .	6b			
c		Tax paid with application for extension of time to file (Form 8868)	6c			
d		Backup withholding erroneously withheld . . . . .	6d			
7		Total credits and payments Add lines 6a through 6d. . . . .		7	100,000	
8		Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached		8		
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9		
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10	94,994	
11		Enter the amount of line 10 to be Credited to 2010 estimated tax	94,994	Refunded	11	0

Part VII-AStatements Regarding Activities

1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .			Yes	No
				1a		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .		1b		No
		If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c		Did the foundation file Form 1120-POL for this year?. . . . .		1c		No
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation  \$ 0 (2) On foundation managers  \$ 0				
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  \$ 0				
2		Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . If "Yes," attach a detailed description of the activities.		2		No
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .		4a	Yes	
b		If "Yes," has it filed a tax return on Form 990-T for this year?. . . . .		4b	Yes	
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T.		5		No
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .		6	Yes	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions)  MA				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV . . . . .		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ WWW.HYAMSFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶ ELIZABETH SMITH Telephone no ▶ (617) 426-5600 Located at ▶ 50 federal street 9TH FLOOR BOSTON MA ZIP+4 ▶ 02110			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ 15			

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?. . . . .	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see page 20 of the instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i> ). . . . .	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

5b

6b

No

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SYLVIA JOHNSON 50 FEDERAL STREET 9TH FLOOR BOSTON,MA 02110	ASSOC DIR 40 00	116,552	12,774	0
MARK PALEY 50 FEDERAL STREET 9TH FLOOR BOSTON,MA 02110	DIR OF FIN 40 00	100,053	20,270	0
angela jones 50 FEDERAL STREET 9TH FLOOR BOSTON,MA 02110	Senior Program Offic 40 00	88,246	19,085	0
David Moy 50 Federal Street 9th Floor boston,MA 02110	Program Officer 40 00	76,843	17,969	0
Susan Perry 50 FEDERAL STREET 9TH FLOOR BOSTON,MA 02110	Administrative Manag 40 00	75,362	17,772	0
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Cambridge Associates 100 Summer Street Boston, MA 02110	Investment Consulting	249,217
NIXON PEABODY 100 Summer Street Boston, MA 02110	LEGAL / CUSTODIAN	88,058
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 CIVIC ENGAGEMENT - SEE SCHEDULE O FOR DESCRIPTION	51,697
2 Teen Development - SEE SCHEDULE O FOR DESCRIPTION	91,692
3 Affordable Housing - SEE SCHEDULE O FOR DESCRIPTION	175,634
4 Special Opportunities Fund - SEE SCHEDULE O FOR DESCRIPTION	30,011

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 In June, 2002, the Board of Trustees voted to lend \$3,000,000 TO HOME FUNDERS COLLABORATIVE, LLC (THE COLLABORATIVE) AS A PROGRAM-RELATED INVESTMENT FOR A PERIOD OF TWENTY YEARS as OF december 31, 2009, the foundation has advanced \$3,000,000 to the collaborative	106,753
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	106,753



Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	115,952,779
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	174,062
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions). . . . .	<b>1c</b>	278,139
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	116,404,980
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	116,404,980
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions). . . . .	<b>4</b>	1,746,075
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	<b>5</b>	114,658,905
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	5,732,945

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	5,732,945
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5. . . . .	<b>2a</b>	5,006
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI ). . . . .	<b>2b</b>	7,200
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	12,206
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	5,720,739
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	5,720,739
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	<b>7</b>	5,720,739

Part XII

Qualifying Distributions (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
<b>a</b>	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	<b>1a</b>	6,188,238
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	106,753
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	6,294,991
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions). . . . .	<b>5</b>	5,006
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	6,289,985
<b>Note:</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7				5,720,739
2	Undistributed income, if any, as of the end of 2008				
a	Enter amount for 2008 only. . . . .			0	
b	Total for prior years 20____, 20____, 20____		0		
3	Excess distributions carryover, if any, to 2009				
a	From 2004. . . . .				1,145,211
b	From 2005. . . . .				
c	From 2006. . . . .				
d	From 2007. . . . .				1,377,955
e	From 2008. . . . .				1,386,169
f	Total of lines 3a through e. . . . .	3,909,335			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 6,294,991				
a	Applied to 2008, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d	Applied to 2009 distributable amount. . . . .				5,720,739
e	Remaining amount distributed out of corpus	574,252			
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,483,587			
b	Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .		0		
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions . . . . .			0	
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 . . . . .				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .	0			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	1,145,211			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	3,338,376			
10	Analysis of line 9				
a	Excess from 2005. . . .				
b	Excess from 2006. . . .				
c	Excess from 2007. . . .				1,377,955
d	Excess from 2008. . . .				1,386,169
e	Excess from 2009. . . .				574,252

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling. . . . .

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b	85% of line 2a . . . . .					
c	Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
d	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets . . . . .					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

elizabeth b smith executive directo  
50 FEDERAL STREET  
BOSTON, MA 02110  
(617) 426-5600

b

The form in which applications should be submitted and information and materials they should include

see attached procedures for applicants

c

Any submission deadlines

NOVEMBER 1, MARCH 1 AND JULY 2

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

see attached procedures for applicants

Form 990-PF (2009)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<div>a Paid during the year</div> See Additional Data Table				
<div>Total . . . . .</div>			<div>3a</div>	4,933,994
<div>b Approved for future payment</div> See Additional Data Table				
<div>Total . . . . .</div>			<div>3b</div>	2,940,000

Enter gross amounts unless otherwise indicated

## **Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

Form **990-PF** (2009)

<b>1</b>	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		<b>Yes</b>	<b>No</b>
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of			
	<b>(1)</b> Cash. . . . .	<b>1a(1)</b>		<b>No</b>
	<b>(2)</b> Other assets. . . . .	<b>1a(2)</b>		<b>No</b>
<b>b</b>	Other transactions			
	<b>(1)</b> Sales of assets to a noncharitable exempt organization. . . . .	<b>1b(1)</b>		<b>No</b>
	<b>(2)</b> Purchases of assets from a noncharitable exempt organization. . . . .	<b>1b(2)</b>		<b>No</b>
	<b>(3)</b> Rental of facilities, equipment, or other assets. . . . .	<b>1b(3)</b>		<b>No</b>
	<b>(4)</b> Reimbursement arrangements. . . . .	<b>1b(4)</b>		<b>No</b>
	<b>(5)</b> Loans or loan guarantees. . . . .	<b>1b(5)</b>		<b>No</b>
	<b>(6)</b> Performance of services or membership or fundraising solicitations. . . . .	<b>1b(6)</b>		<b>No</b>
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .	<b>1c</b>		<b>No</b>
<b>d</b>	If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</b> should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column <b>(d)</b> the value of the goods, other assets, or services received.			

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . ☐ Yes ☒ No





**b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

*****	2010-11-15	*****
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only	Preparer's Signature  THOMAS WASHBURN CPA	Date	Check if self-employed 	Preparer's identifying number (see <b>Signature</b> on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code 	ALEXANDER ARONSON FINNING & CO PC		EIN 
		21 EAST MAIN STREET  WESTBORO, MA 01581		Phone no (508) 366-9100

TY 2009 Accounting Fees Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
accounting	53,434	25,995		27,439

**TY 2009 Investments Corporate  
Bonds Schedule**

**Name:** THE HYAMS FOUNDATION INC  
**EIN:** 04-6013680

Name of Bond	End of Year Book Value	End of Year Fair Market Value
fixed income investments	22,056,014	22,056,014



**TY 2009 Investments Corporate  
Stock Schedule**

**Name:** THE HYAMS FOUNDATION INC  
**EIN:** 04-6013680

Name of Stock	End of Year Book Value	End of Year Fair Market Value
equity investments	60,748,475	60,748,475

## TY 2009 Investments - Other Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
program related investments	FMV	3,891,500	3,891,500
Alternative investments	FMV	42,184,884	42,184,884
OTHER INVESTMENTS	FMV	264,941	264,941

# TY 2009 Land, Etc. Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE EQUIPMENT	182,566	174,453	8,113	8,113
LEASEHOLD IMPROVEMENTS	25,791	9,025	16,766	16,766

TY 2009 Legal Fees Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
legal	5,275	0		5,275

TY 2009 Other Assets Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
LOANS RECEIVABLE	75,000	75,000	75,000

# TY 2009 Other Expenses Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursement s for Charitable Purposes
equipment maintenance & rental	15,130	0		15,130
miscellaneous	12,443	0		12,443
insurance	22,136	0		22,136
postage	3,388	0		3,388
telephone	8,213	0		8,213
office supplies	3,682	1,591		2,091
investment fees	623,913	623,913		0

TY 2009 Other Increases Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Description	Amount
Net unrealized gains	24,992,694

TY 2009 Other Liabilities Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED EXCISE TAX	0	195,000



## TY 2009 Other Professional Fees Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
consulting	2,618	0		2,618
investment consulting fees	239,341	239,341		0

TY 2009 Taxes Schedule

**Name:** THE HYAMS FOUNDATION INC

**EIN:** 04-6013680

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	113,882	0		0

Additional Data

Software ID: 09000028

Software Version: 2009.05000

EIN: 04-6013680

Name: THE HYAMS FOUNDATION INC


Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
barbara casey	trustee	0	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	5 00			
edward m swan jr	trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
roslyn m watson	trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
john h clymer	trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
IRIS GOMEZ	TRUSTEE	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
JOHN H SARVEY	Trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
LONG h NGUYEN	Trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
ELIZABETH SMITH	EXECUTIVE DIRECTOR	182,030	18,475	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	40 00			
ADAM d SEITCHIK	Trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR BOSTON, MA 02110	2 00			
Karen L Mapp	Trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR boSTON, MA 02110	2 00			
Marti Wilson-Taylor	trustee	14,500	0	0
50 FEDERAL STREET 9TH FLOOR boSTON, MA 02110	2 00			
meizhu lui	trustee	3,625	0	0
50 FEDERAL STREET 9TH FLOOR boSTON, MA 02110	2 00			

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
african community economic development16 John Elliot Square Roxbury, MA 02119	grantee	501(C)(3)	promote civic participation, youth and economic deve	70,000
Allston Brighton Community Development Corporation20 Linden Street allston, MA 02134	grantee	501(C)(3)	promote civic participation, youth and economic deve	25,000
Alternatives for Community Environment Inc2181 Washington Street Suite 301 Roxbury, MA 02119	grantee	501(C)(3)	promote civic participation, youth and economic deve	30,000
Asian American PacificIslanders in Philanthropy200 Pine Street Suite 700 san francisco, CA 94104	grantee	501(C)(3)	promote civic participation, youth and economic deve	1,000
Associated Grant Makers Inc55 Court Street boston, MA 02108	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	19,800
Association of Black Foundation Executives55 Exchange Place new york, NY 10005	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	500
Bay Cove Human Services Inc66 Canal Street boston, MA 02114	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Bikes Not Bombs Inc284 Amory Street jamaica plain, MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Black Ministerial Alliance of Greater Boston2326R Washington Street Roxbury, MA 02119	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	67,500
Boston Affordable Housing Coalition42 Seaverns Avenue Jamaica Plain, MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Boston Center for Independent Living Inc60 Temple Place 5th Floor Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Boston Foundation Inc75 Arlington Street Boston, MA 02116	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	75,000
Boston Parents Organizing Network89 South Street Suite 700 Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	15,640
Boston Private Industry Council Inc2 Oliver Street boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
Boston Tenants Coalition14 Beacon Street Suite 606 boston, MA 02108	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	55,000
Total . . . . . 3a				4,933,994

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
boston urban youth foundation incPost Office Box 1545 Boston,MA 02130	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	17,000
Boston Women's Fund14 Beacon Street Suite 805 Boston,MA 02210	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	15,000
Boston Workers Alliance26 West Street 3rd Floor Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
Center for Social Policy225 Franklin Street 12th Floor Boston,MA 02110	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	17,500
Center for the Development of Teen Empowerment Programs Inc48 Rutland Street Boston,MA 02118	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Center to Support Immigrant Organizing89 South Street Suite 700 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	100,000
Chelsea Collaborative Inc300 Broadway Chelsea,MA 02150	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	100,000
Chelsea Community Fund75 Arlington Street 10th Floor Boston,MA 02116	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Chelsea Neighborhood Developers4 Gerrish Avenue Chelsea,MA 02150	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	100,000
Chelsea REACH Program500 Broadway Chelsea,MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	150,000
Children's Services of Roxbury Inc520 Dudley Street Roxbury,MA 02119	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	1,000
Chinatown People Progressive Association Inc28 Ash Street Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Citizens for Safety Inc31 Health Street Suite 12 Jamaica Plain,MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
City School Inc614 Columbia Road Dorchester,MA 02125	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
CIVIC ENGAGEMENT INITIATIVE75 Arlington Street 10th Floor Boston,MA 02116	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	30,000
<b>Total . . . . .</b>  <b>3a</b>				4,933,994

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
Codman Square Neighborhood Development Corporation587 Washington Street Dorchester, MA 02124	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	75,000
Commonwealth Compact225 Franklin Street 12th Floor Boston, MA 02110	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Community Labor United Inc (formerly Alliance for New Priorities)8 Beacon Street 2nd Floor boston, MA 02118	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
Council on Foundations2121 Crystal Drive Suite 700 Arlington, VA 22202	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	18,290
Disability Policy Consortium IncPost Office Box 77 Boston, MA 02133	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	20,000
Dorchester Bay Economic Development Corporation594 Columbia Road Suite 302 Dorchester, MA 02125	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	75,000
Dudley Street Neighborhood Initiative Inc504 Dudley Street Roxbury, MA 02119	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	67,000
English for New BostoniansBoston City Hall Room 803 Boston, MA 02201	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	150,000
Fair Housing Center of Greater Boston59 Temple Place Rm 1105 Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
fairmountIndigo Line CDC Collaborative594 Columbia Road Suite 302 dorchester, MA 02125	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	50,000
Federated Dorchester Neighborhood Houses Inc18 Samoset Street Dorchester, MA 02122	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	150,000
Fourth Presbyterian Church340 Dorchester Street South Boston, MA 02127	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	20,000
Freedom House Inc14 Crawford Street Boston, MA 02121	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	45,700
Friends of St Stephen's Youth Programs Inc419 Shawmut Avenue Boston, MA 02118	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	20,000
Grantmakers Concerned with Immigrants and RefugeesPost Office Box 1100 Sebastopol, CA 95473	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	500
<b>Total . . . . .</b>  <b>3a</b>				4,933,994

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Grantmakers for Children Youth & Families8757 Georgia Avenue Suite 540 Silver Spring, MD 20910	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	1,000
Grantmakers for Education720 SW Washington Street Portland, OR 97205	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	1,000
Greater Boston Interfaith Organization Sponsoring Committee Inc594 Columbia RoadSuite 402 Dorchester, MA 02125	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Hispanics in Philanthropy200 Pine Street Suite 700 San Francisco, CA 94104	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	500
Hyde Square Task Force Inc375 Centre StreetPost Office Box 1871 Jamaica Plain, MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	70,000
Inquilinos Boricuas en Accion405 Shawmut Avenue Boston, MA 02118	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	150,000
Institute on Assets and Social Policy 415 South Street Waltham, MA 02453	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	10,000
Local Initiatives Support Corporation 95 Berkeley Street Suite 202 Boston, MA 02116	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	105,000
Madison Park Development Corporation184 Dudley Street Suite 400 Roxbury, MA 02119	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Mass Mentoring Partnership Inc105 Chauncy Street Suite 300 Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Massachusetts Advocates for Children Inc (formerly Task Force for Childre25 Kingston Street 2nd Floor Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Massachusetts Alliance for Adult Literacy160 Boylston Street Boston, MA 02116	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Massachusetts Association of Community Development Corporations89 South Street 4th Floor Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Massachusetts Coalition for Occupational Safety and Health Inc 42 Charles Street Suite F Dorchester, MA 02122	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Massachusetts Immigrant and Refugee Advocacy Coalition Inc105 Chauncy Street Suite 402 Boston, MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	68,000
Total . . . . . 3a				4,933,994

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Name and address (home or business)				
<b>a</b> Paid during the year				
Massachusetts Jobs with Justice 3353 Washington Street boston,MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Massachusetts Nonprofit Network89 South Street Suite 700 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	250
Massachusetts Senior Action Council Inc565 Warren Street Boston,MA 02121	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Massachusetts Voter Education Network Inc18 Tremont Street Suite 608 Boston,MA 02108	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
Matahari Eye of the Day89 South Street Suite 700 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	50,000
Neighbor to Neighbor Massachusetts Education Fund Inc8 Beacon Street 4th Floor Boston,MA 02108	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Neighborhood Development Corporation of Jamaica Plain31 Germania Street Jamaica Plain,MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	100,000
Neighborhood Funders Group Inc 1301 Connecticut Avenue NW Suite 500 Washington,DC 20036	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	800
Neighborhood of Affordable Housing Inc143 Border Street East Boston,MA 02128	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
New England Blacks in Philanthropy 55 Court Street Boston,MA 02108	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	500
Oiste Civic Education Initiative59 Temple Place Suite 500 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Organizing and Leadership Training Center1773 Dorchester Avenue Boston,MA 02124	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Phoenix Charter Academy101 Park Street Chelsea,MA 02150	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Project RIGHT Inc320 Blue Hill Avenue Dorchester,MA 02121	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
RO CA Inc101 Park Street Chelsea,MA 02150	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	125,000
<b>Total . . . . .</b>  <b>3a</b>				4,933,994



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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Sociedad Latina Inc1530 Tremont Street Boston,MA 02120	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
South Boston en Accion70 Gen Wm H Devine Way South Boston,MA 02127	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	50,000
South EndLower Roxbury Youth Workers' Alliance89 South Street Suite 700 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,250
Spontaneous Celebrations Inc45 Danforth Street Jamaica Plain,MA 02130	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Third Sector New England89 South Street Suite 700 Boston,MA 02111	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	51,000
Union of Minority Neighborhoods418 Commonwealth Avenue Boston,MA 02215	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	35,000
Uphams Corner Community Recreational Center Inc500 Columbia Road Dorchester,MA 02125	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Urban Edge Housing Corporation1542 Columbus Avenue Suite 2 Roxbury,MA 02119	GRANTEE	501(C)(3)	promote civic participation, youth and economic deve	100,000
Urban Revival IncPost Office Box 300107284 Jamaica Plain,MA 02130	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
WAITT House Inc117 Mount Pleasant Avenue Roxbury,MA 02119	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	5,000
Youth Policy Initiative75 Arlington Street 10th Floor Boston,MA 02116	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	60,000
AMERICAN TRAINING CENTER INC102 Glenn Street LAWRENCE,MA 01843	GraNTEE	501(C)(3)	promote civic participation, youth and economic deve	110,000
AMPLAmplifyme Inc (formerly Project Think Different)14 Beacon Street Suite 503 BOSTON,MA 02108	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	37,500
BEA Institute for Educational Success Inc20 Kearsarge Avenue ROXBURY,MA 02119	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	110,000
Boston Asian Youth Essential Service Inc199 Harrison Avenue BOSTON,MA 02111	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	30,000
Total . . . . . 3a				4,933,994


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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Brazilian Immigrant Center Inc14 HARVARD AVENUE ALLston, MA 02134	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	1,000
Brazilian Women's Group569 Cambridge Street ALLston, MA 02134	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	1,000
bridge inc47 west street boston, MA 02111	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	135,000
center for youth and communities415 South Street Room 117 waltham, MA 02453	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	50,000
cooperative economics for women95 Berkeley Street Suite 306 boston, MA 02116	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Crittenton Women's UnionOne Washington Mall 2nd Floor boston, MA 02108	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Executive Service Corps of New England Inc176 Federal Street Suite 5-C boston, MA 02110	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	7,500
Foundation Financial Officers Group Inc216 W Jackson Blvd Suite 625 chicago, IL 60606	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	1,200
Four Corners Action Coalition Inc367 Washington Street dorchester, MA 02124	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	45,000
Grantmakers for Effective Organizations1725 DeSales Street NW Suite 404 washington, DC 20036	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	2,250
Grants Managers Network1101 14th Street NW washington, DC 20005	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	500
homes for families inc14 Beacon Street Suite 615 boston, MA 02108	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
Institute for Nonprofit Management and Leadership881 Commonwealth Avenue 471 boston, MA 02215	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	15,000
Interaction Institute for Social Change625 Mount Aurburn Street cambridge, MA 02138	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	3,234
Irish Immigration Center Inc59 Temple Street Suite 1010 boston, MA 02111	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	80
Total . . . . . 3a				4,933,994


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
Massachusetts Union of Public Housing Tenants Inc784 Washington Street Suite 504 boston, MA 02124	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
Mel King Institute15 Court Square Suite 600 boston, MA 02108	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	2,500
Metropolitan Boston Housing Partnership125 Lincoln Street 5th Floor boston, MA 02111	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	25,000
National Consumer Law Center Inc7 Winthrop Square 4th Floor boston, MA 02110	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Press Pass TV565 Boylston Street 5th Floor boston, MA 02116	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	20,000
PRI Makers Network2101 Fourth Avenue Suite 650 seattle, WA 98121	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	1,000
Project HIP-HOP Inc2181 Washington Street Suite 315 boston, MA 02119	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
United Way of Massachusetts Bay and Merrimack Valley51 Sleeper Street boston, MA 02205	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	27,500
Urban College of Boston178 Tremont Street Boston, MA 02111	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	750
Women Express Inc80 Summer Street Suite 300 Boston, MA 02110	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	45,000
Working Group on Nonprofit Stabilization & Recovery14 Crawford Street Boston, MA 02121	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	30,250
Year Up Inc93 Summer Street Boston, MA 02110	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	25,000
Youth on Board58 Day Street SOMerville, MA 02144	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	30,000
Youthbuild Boston Inc504 Dudley Street ROxbury, MA 02119	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	135,000
Massachusetts Affordable Housing Alliance Inc1803 Dorchester Avenue Dorchester, MA 02124	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	40,000
<b>Total . . . . .</b>  <b>3a</b>				4,933,994

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Massachusetts Alliance Against Predatory Lending367 Washington Street Dorchester, MA 02124	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	25,000
Massachusetts Alliance on Teen Pregnancy105 CHAUNCY STREET 8TH FLOOR Boston, MA 02111	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	25,000
BOSTON TEN POINT COALITION INC215 FOREST HILLS STREET BOSton, MA 02130	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	63,000
<b>Total . . . . .</b>  <b>3a</b>				4,933,994

Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>b</b> <i>Approved for future payment</i>				
boston foundation Inc75 Arlington Street boston, MA 02114	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	75,000
codman Square Neighborhood Development Corporation587 Washington Street dorchester, MA 02124	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	300,000
dorchester Bay Economic Development Corporation594 Columbia Road Suite 302 dorchester, MA 02125	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	300,000
AMERICAN TRAINING CENTER INC 102 Glenn Street LAWRENCE, MA 01843	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	200,000
BEA Institute for Educational Success Inc20 Kearsarge Avenue ROXBURY, MA 02119	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	200,000
Boston Tenant Coalition14 BEACON STREET SUITE 606 BOSTON, MA 02108	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	45,000
BOSTON WORKERs Alliance3353 Washington Street Boston, MA 02130	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	35,000
bridge inc47 west street boston, MA 02111	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	250,000
chelsea neighborhood Developers4 Gerrish Avenue chelsea, MA 02150	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	200,000
federated Dorchester Neighborhood Houses Inc18 Samoset Street dorchester, MA 02122	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	250,000
inquilinos Boricuas en Accion405 Shawmut Avenue boston, MA 02118	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	250,000
massachusetts senior Action Council Inc565 Warren Street boston, MA 02121	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
matahari Eye of the Day89 south street suite 700 boston, MA 02111	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
New England For Justice (formerly Boston ACORN)196 Adams Street dorchester, MA 02122	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	10,000
organizing and Leadership Training Center1773 Dorchester Avenue boston, MA 02124	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
<b>Total . . . . .</b>  <b>3b</b>				2,940,000

Form 990PF Part XV Line 3b - Grants and Contributions Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>b</b> <i>Approved for future payment</i>				
project RIGHT Inc320 Blue Hill Avenue dorchester, MA 02121	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
roCA Inc101 Park Street chelsea, MA 02150	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	250,000
Sociedad Latina Inc1530 Tremont Street boston, MA 02120	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	40,000
South Boston en Accion70 Gen Wm H Devine Way south Boston, MA 02127	graNTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
United Way of Massachusetts Bay and Merrimack Valley51 Sleeper Street boston, MA 02205	GraNTEE	501(C)(3)	promote civic participation, youth and economic deve	30,000
Urban Revival Inc284 Amory Street JAmaica Plain, MA 02130	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	45,000
Youth on Board58 Day Street SO merville, MA 02144	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	30,000
Youthbuild Boston Inc504 Dudley Street Roxbury, MA 02119	GraNTEE	501(C)(3)	Promote civic participation, youth and economic deve	250,000
<b>Total . . . . . 3b</b>				2,940,000