

# PERMANENT CHARITY FUND (THE BOSTON FOUNDATION)

Records, 1915-1990 (with gaps)

Charities Collection -- CC 15

2 boxes	Processed November 1996 by Mary Anne Herring
7.5 linear inches	Supervising Archivist: Claire Goodwin
Accession number: 1996.057	

ACQUISITION: In 1911, the Boston Children's Aid Society gave its entire library to the Simmons College School of Social Work Library. This library included the annual reports of many local and international welfare and charitable organizations. With the passage of time this collection took on historical significance; in 1991 it was transferred to the Simmons College Archives.

As part of donations in 1988 and 1989, Donald Moreland, a local social work administrator and collector of social work history, gave the Simmons College Archives a large number of annual reports, pamphlets, and other materials related to various welfare and charitable organizations. Because neither of these donations formed a discrete collection, the materials donated by Donald Moreland were combined to form the Charities Collection. The Simmons College Archives Charities Collection consists of numerous small collections. Accession numbers for the individual collections are assigned during processing.

ACCESS: Unrestricted.

COPYRIGHT: Requests for permission to publish materials from this collection should be discussed with the College Archivist.

## HISTORY:

Many persons desire to make gifts to charity or to leave money in trust for charitable purposes, but are in doubt as to the proper means of doing so effectively.<sup>1</sup> To meet this need, the Permanent Charity Fund (PCF) was established in 1915 by Charles E. Rogerson and Charles Rogerson, father and son, both of whom were officers of the Boston Safety Deposit and Trust Company (BSDT). The objective of the PCF - the third community foundation in the country - was to build up an endowment which would indeed be a permanent fund (spending income only) to improve the life of the community. A

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<sup>1</sup> *Permanent Charity Fund: Boston Safe Deposit and Trust Company, Trustee* [Boston: September 7, 1915] page 5.

growing number of donors contributed, with the knowledge that their funds would be carefully preserved in perpetuity.

In 1916, an unrestricted bequest of \$4,000,000 gave the new Fund a start. Early grants went to education, medicine, and social welfare, particularly to agencies strained financially by World War I. In its early years, the PCF was also deeply involved helping new immigrants mired in poverty.

Again, in the Depression, the Fund's main effort was to aid families needing direction and care. During the 1930's, its largest single grant went to the two principal relief agencies, the Boston Provident Society and the Family Welfare Society (formally the Associated Charities of Boston). Following World War II, the PCF's efforts were centered on problem youth: the "generation gap" between adolescents and their parents, the alienation of youth, and juvenile delinquency<sup>2</sup> .

In 1959, Alfred Stone Jr. left an extraordinary bequest of \$20,000,000. It was by far the largest ever made to a community fund in this country, doubling the PCF's total assets.

In the 1960's, the PCF's principal grants were made to agencies associated with social changes, including neighborhood health care centers and day care centers. Meanwhile, the Fund stopped making grants to hospitals for operating expenses or relief to individuals, and it announced that it would fund only "major capital needs, particularly projects affecting the community role of the hospital which may lead to improved ways of financing or providing health care".

By 1975, the PCF was distributing grants totaling \$3,000,000 annually. Through the 1970's and the 1980's, the PCF increasingly funded pilot, demonstration, and special projects to encourage "institutional change and greater responsiveness to changing needs"<sup>3</sup> . In the mid-1980's, the PCF changed its name to the Boston Foundation (BF).

In 1985, the BF, supporting innovation, launched a five-year Poverty Impact Program, with an emphasis on women and children, supporting innovative community-based projects on Maternal and Health Care, Teenage Pregnancy, Employment and Training, and Urban Parks and Public Spaces.

Compiled by Dick Carroll, July 1995

### **SCOPE AND CONTENT NOTE:**

The records of the Permanent Charity Fund constitute 7.5 inches. The collection has three series. The first series contains Year books/Annual Reports arranged

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<sup>2</sup> *The Forty-Sixth Year Book of the Committee of the Permanent Charity Fund, Inc.* 1963 [n.p., n.d.] page 12.

<sup>3</sup> *The History of the Boston Foundation 1915-1990* [n.p., n.d.] page 18.

chronologically. The second series contains the first and second editions of the *Boston Safe Deposit and Trust Company, Trustee* 1915 and 1921, which contains the "Agreement and Declaration of Trust". The third series contains a report on the 75th Anniversary of the Boston Foundation, formerly the Permanent Charity Fund.

## **SERIES LISTING:**

SERIES I. Year Books/Annual Reports, 1918-1972 (with gaps).

SERIES II. Agreement and Declaration of Trust, 1915, 1921.

SERIES III. The History of the Boston Foundation 1915-1990, 75th Anniversary Report

## **SERIES DESCRIPTION**

SERIES I. Year Books/Annual Reports, 1918-1972 (with gaps).

This series contains the Permanent Charity Fund's Year Books/Annual Reports. The contents of the Year Books/Annual Reports may include the scope and purposes of the PCF, list of members, listings of the donations given to the PCF throughout the year, the Treasurer's report, reports on the activities of the PCF throughout the year, graphs, tables, listings of the charitable organizations which were given money by the PCF, and pictures.

SERIES II. Agreement and Declaration of Trust 1915, 1921.

This series contains the first and second editions of the booklet entitled, *Permanent Charity Fund: Boston Safe Deposit and Trust Company, Trustee*. Both editions are the same except the listings of the members and directors are different and the second edition contains a copy of the "Form Of General Bequest And Devise To The Permanent Charity Fund". The booklets contain an introduction, general scope and purposes of the PCF, and the Agreement and Declaration of Trust.

SERIES III. The History of the Boston Foundation 1915-1990, 75th Anniversary Report.

This series contains *The History of the Boston Foundation 1915-1990* honoring the 75th Anniversary of the Boston Foundation formerly the Permanent Charity Fund. This report contains the history of the Foundation and photos relating to the Foundation.

**CONTAINER LIST:**

<b>BOX</b>	<b>FOLDER</b>	<b>CONTENTS</b>
		<b>SERIES I. Year Books/Annual Reports, 1918-1972.</b>
1	1	Year Books 1918, 1919
	2	Year Books 1920, 1921
	3	Year Books 1922, 1923
	4	Year Books 1924, 1926
	5	Year Books 1929, 1931
	6	Year Books 1932, 1933
	7	Year Books 1934, 1935
	8	Year Books 1936, 1937
	9	Year Books 1938, 1939
	10	Year Books 1940, 1941
	11	Year Books 1942, 1943
	12	Year Books 1944, 1945
	13	Year Books 1946, 1947
	14	Year Books 1948, 1949
	15	Year Books 1950, 1951
	16	Year Books 1952 (2 copies)
	17	Year Books 1953
	18	Year Books 1954, 1956, 1957
	19	Year Books 1958, 1959, 1960
	20	Year Books 1961, 1962, 1963
	21	Year Books 1964, 1965
	22	Annual Reports 1966, 1967, 1968
2	1	Annual Reports 1969, 1971, 1972
	2	<b>SERIES II. Agreement and Declaration of Trust 1915, 1921</b>
	3	<b>SERIES III. The History of the Boston Foundation 1915-1990, 75th Anniversary Report</b>