



# GREATER BOSTON AND MASSACHUSETTS

## PHILANTHROPIC LANDSCAPE

JUNE 2020



# INTRODUCTION

Every June, Giving USA provides its report on philanthropy from the previous year to the nonprofit community. While reviewing the findings from 2019 will be informative, we know that the current pandemic, social unrest, and economic upheaval are presenting real-time and frequently changing demands on nonprofits across all sectors. In recent years, charitable giving in the United States has reached record-breaking numbers in contributions reported from individuals, foundations, and charitable bequests. The last significant dip in giving was during the financial crisis in 2009, when an estimated 14 million fewer US households reported making charitable gifts.

We know that the COVID-19 pandemic has significantly impacted nonprofit programming and finances. All insights point to continued unpredictability. The sector would be wise to make plans now to mitigate a potential dip in fundraising in 2020. While we can't forecast the future, we do know that it's critical that organizations stay connected to the communities that they serve, despite economic contraction and our inability to gather as usual. Our valid concerns about the impact of COVID-19 and the societal climate underscore the nonprofit sector's vital leadership role in the welfare of our communities.

More than one million nonprofit organizations are registered in the United States. How well institutions can pivot in response to the monumental events of 2020 will affect their philanthropy and income, and as a result, their programming and impact, well into the future. With this in mind, CCS has endeavored to consolidate many insightful reports on giving and current trends during these uncertain times into this regional philanthropic landscape. We hope that this publication provides valuable information to help nonprofit organizations develop informed strategies to sustain their vital missions.



Brian Nevins  
Principal & Managing Director  
CCS Fundraising

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## ABOUT CCS

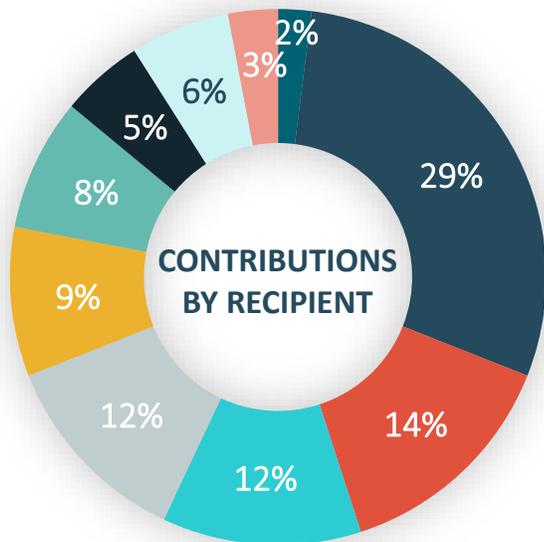
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# NATIONAL SNAPSHOT: THE PHILANTHROPIC LANDSCAPE

# HIGHLIGHTS FROM THE NATIONAL PHILANTHROPIC LANDSCAPE

In 2019, giving reached \$449.64 billion  
a \$21.93 billion increase since 2018.



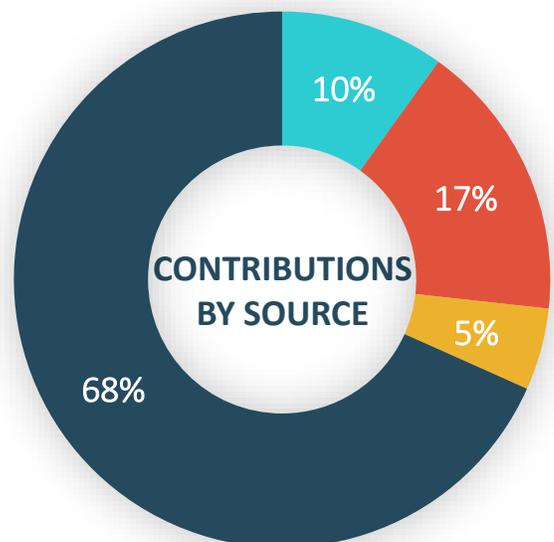
- Individuals
- Education
- Grantmaking Foundations
- Public-Society Benefit
- International Affairs
- Religion
- Human Services
- Health
- Arts, Culture & Humanities
- Environmental/Animal Welfare

The following notable changes in giving by recipient occurred from 2018-2019:

- Giving to public-society benefit organizations increased by **13.1%**
- Giving to arts, culture, and humanities increased by **12.6%**
- Giving to education increased by **12.1%**
- Giving to environmental and animal welfare organizations increased by **11.3%**

The following notable changes in giving source have occurred since 2018:

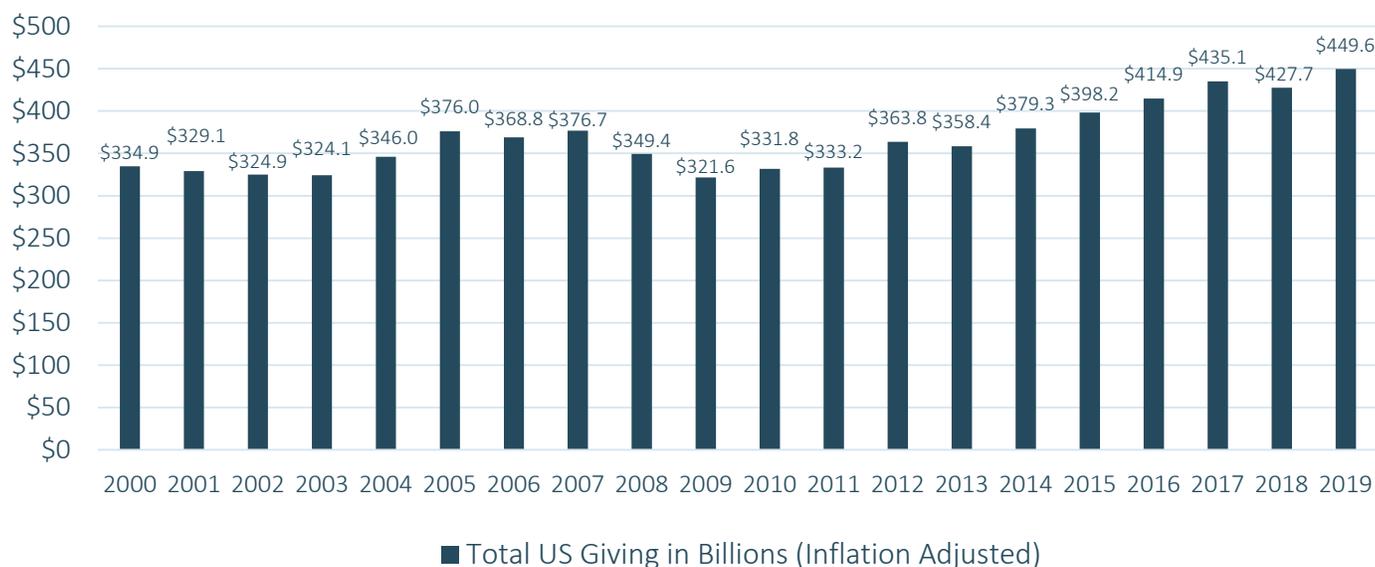
- Giving by corporations increased **13.4%**
- Giving by individuals increased by **4.7%**
- Foundation giving increased by **2.5%**



- Bequests
- Foundations
- Corporations
- Individuals

# HISTORIC PERSPECTIVE

## TOTAL CHARITABLE GIVING 2000-2019



Nonprofit organizations, which depend on philanthropic support from the community to carry out their critical missions, will continue to be effected by the short- and long-term impacts of COVID-19. While the implications of COVID-19 cannot be directly compared to any other recent major crisis, it is helpful to look back at how philanthropy has been impacted by other major crises.

In inflation adjusted dollars, total giving has declined just 13 times since 1978, including after 9/11 and the Great Recession.

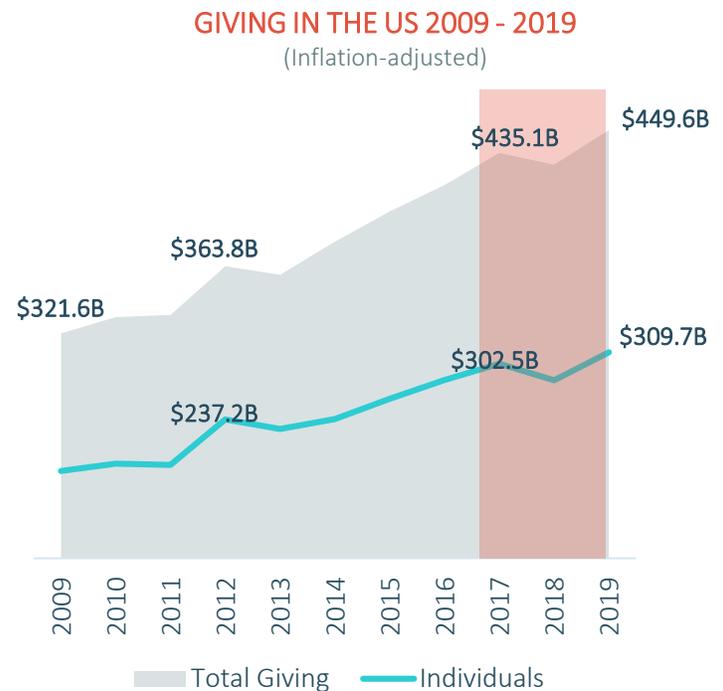
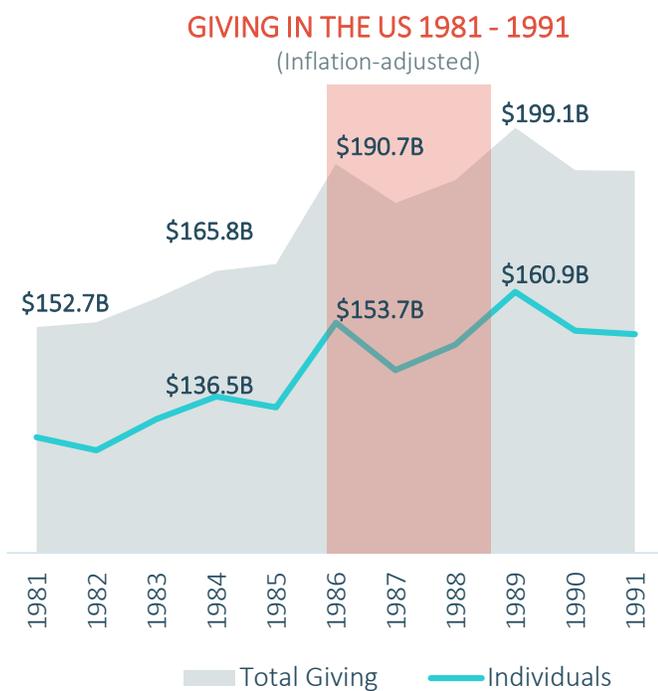
Declines are tied to policy changes, like the Tax Cuts and Jobs Act which impacted charitable deductions, and economic events/stock market performance.

Even after major events, like the stock market crash of 2008, giving typically recovers within a few years.

# SPOTLIGHT ON TAX REFORM

## Key Takeaways: Tax Cuts and Jobs Act of 2017

- The 2017 tax reforms doubled the standard deduction. Before 2017, approximately 30% of taxpayers itemized. The Tax Foundation estimated that in 2019, that number had fallen to 13.7% of taxpayers. The decrease in the number of itemizers had an overall dampening effect on philanthropy in the first year following tax reform (2018), but philanthropists likely adjusted their giving behavior in response, contributing to the recovery in 2019.
- For those who continue to itemize, the limit of charitable donations they can deduct increased from 50% of adjusted gross income to 60% of adjusted gross income, which could lead to more tax savings for those individuals.
- Tax deductions have consistently ranked near the bottom of a donor’s stated reasons for giving. According to the 2018 US Trust Study of High Net Worth Philanthropy, just 17% of HNW donors said they were always motivated to give by tax benefits. In 2015, that number was 18%.



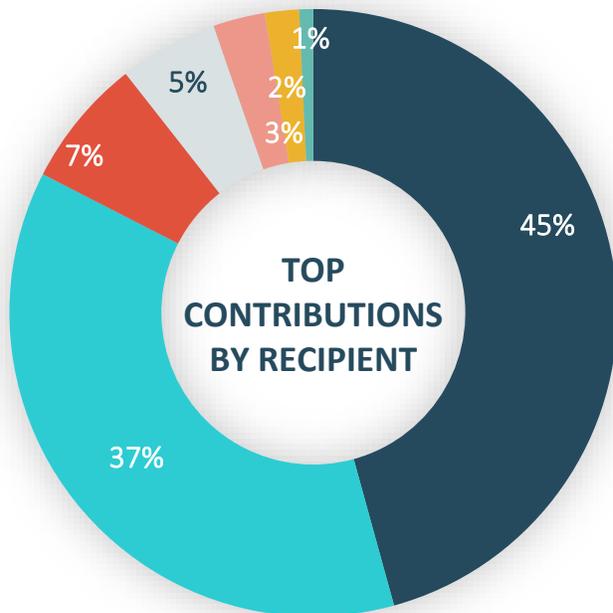
## What Has History Shown Us?

Prior to 2017, the last major change to the U.S. tax law was the 1986 Tax Reform Act, in which Congress cut tax rates and eliminated a deduction for charitable gifts that was previously available even to people who took the standard deduction. As anticipated, these changes led to reduced donations from 1986 to 1987; individual and family giving fell nearly 4%, or 7.2% after adjusting for inflation. However, researchers found that the decline was at least partly due to taxpayers who anticipated the new law by making donations in 1986 that they would otherwise have delayed until the following year, so that they could save more in taxes under the more favorable 1986 system. In 1988, total giving resumed its upward trajectory, which lasted until the 2008 recession.

# NATIONAL SNAPSHOT: CURRENT EVENTS

# PHILANTHROPIC RESPONSE TO COVID-19

## Global Philanthropic Response to COVID-19



- Public Safety
- Health
- Human Services
- Community & Economic Development
- Education
- Information & Communications
- Science

## National Giving

*As of June 29, 2020*



**6,431**

Grants



**500**

Funders



**5,045**

Recipients

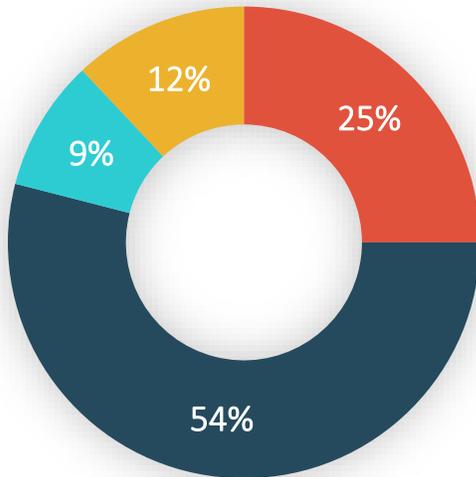
# NATIONAL FUNDRAISING DURING COVID-19: DONORS ARE GIVING GENEROUSLY

DONOR	AMOUNT	PURPOSE
<b>JACK DORSEY</b>	\$1B	To fund COVID-19 relief around the world
<b>WELLS FARGO FOUNDATION</b>	\$181M	To help address food, shelter, small business, housing stability, and to the CDC's Emergency Relief Fund
<b>CHINA EVERGRANDE GROUP</b>	\$115M	To a consortium of Boston area clinicians and research institutions to develop diagnostic tools, treatments, and vaccines
<b>BLUE MERIDIAN PARTNERS</b>	\$100M	To provide an initial round of investments for the Family Independence Initiative, GiveDirectly, the National Domestic Workers Alliance, One Fair Wage, and The Workers Lab, all of which provide cash payments to people who need immediate financial assistance
<b>NETFLIX</b>	\$100M	To create an economic relief fund to help the filmmaking community who are out of work during COVID-19
<b>JEFF BEZOS</b>	\$100M	To support Feeding America's efforts to provide food for those facing hardship during COVID-19
<b>NEW YORK COMMUNITY TRUST</b>	\$75M+	To create the NYC COVID-19 Response & Impact Fund to support nonprofits addressing essential healthcare and food insecurity, and arts and culture groups facing financial losses from COVID-19
<b>GOOGLE</b>	\$50M	To support health and science, educational resources for children who are out of school, and small businesses
<b>OTTO BREMER TRUST</b>	\$50M	Through its Community Benefit Financial Company, to provide emergency funds, loans, lines of credit, and other financial resources to nonprofits and organizations impacted by and responding to COVID-19 in Minnesota, Wisconsin, North Dakota, and Montana

*Select Notable Gifts*

# CURRENT DONOR SENTIMENT

Fidelity Charitable conducted a recent [survey of philanthropic individuals](#) to see how they are thinking about philanthropy in response to the pandemic and how the situation could affect their giving and volunteering behaviors.



## COVID-19 Impact on Financial Support

**54%** of donors plan to maintain their giving

**25%** of donors plan to increase their donations

**12%** do not know

**9%** of donors plan to give less

## Survey participants who indicated they would donate more in 2020 as a result of COVID-19 indicated that they would do so because:

The need is so great.

63%

I want to help out.

61%

My community is suffering.

46%

I'll give to nonprofits that are helping with COVID-19.

42%

The nonprofits I give to will need more funding.

40%

## Survey participants who indicated that they would donate less indicated that their rationale was:

I'm not sure what my income will be this year.

58%

I'm worried about a recession and the economy overall.

58%

The stock market is too volatile.

34%

I'm ramping down participation in usual charitable activities.

14%

I'm directly supporting individuals in my community.

11%

I'm not confident my donation will be helpful.

4%

# SPOTLIGHT ON DONOR ADVISED FUNDS

Donor Advised Funds (DAFs) have experienced a continuous increase in annual grants, contributions, and popularity among a growing number of philanthropists.

Total charitable assets in DAFs:

**\$121.42B**

Total annual contributions to DAFs:

**\$37.12B**

Total annual grants from DAFs:

**\$23.42B**

Fidelity Charitable reported the following DAF trends from January 1, 2020 to May 5, 2020.

**\$236M**

Donated from DAF account holders to COVID-19 response efforts.

**\$2.5B**

Total donated from DAF accounts during this time period.

**20%**

Increased DAF giving as compared to the same quarter last year, representing 2.1% of the total estimated amount of money sitting in DAFs and community foundations.

## #HalfMyDAF Challenge

The #HalfMyDAF Challenge was established by philanthropists David and Jennifer Risher to encourage DAF holders to transfer some of the \$120 billion in DAFs and community foundations into the community.

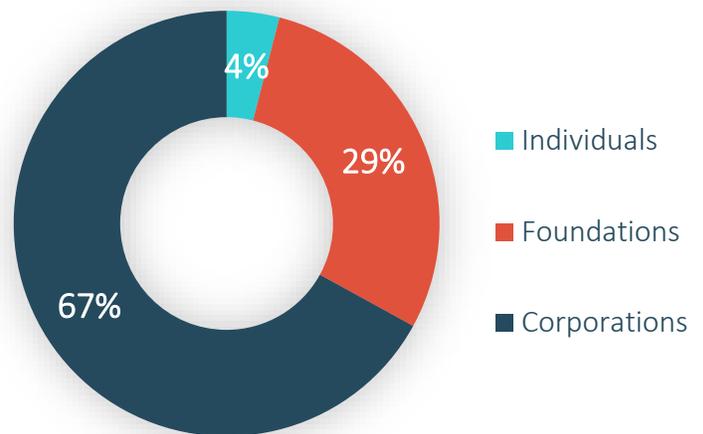
To enter the challenge, DAF holders must donate half of their DAF to a nonprofit of their choosing before September 30, 2020. At least 100 nonprofits receiving a “Half my DAF” donation will be awarded \$10,000 or \$25,000.

# 2020 PHILANTHROPIC RESPONSE TO BLACK LIVES MATTER, RACIAL JUSTICE, AND EQUITY MOVEMENT

Immediately following the killing of George Floyd by a Minnesota police officer on May 25, 2020, tens of millions of Americans took to the streets and to their wallets to demand racial equity. In just under three weeks, individuals, foundations, and corporations donated more than \$3.67 billion to established organizations like the NAACP, as well as grassroots organizations and funds run by a small staff or volunteers.

**\$3.67 Billion**

in publicly reported donations and pledges were made between May 25 and June 25, 2020 to support Black Lives Matter and the racial equity movement.



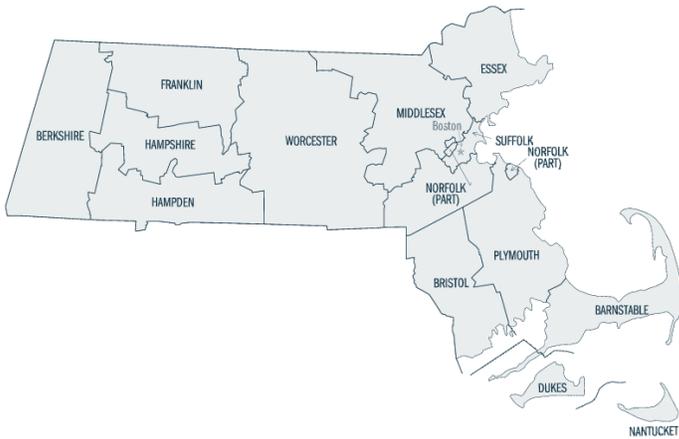
## TOP CONTRIBUTIONS BY AMOUNT

Donor	Amount	Details
Bank of America	\$1B	To support economic opportunity initiatives over 4 years
PayPal	\$500M	To establish a long-term economic opportunity fund for black and underrepresented minority businesses and communities
Crowdsourced grassroots funds	\$157M	To support grassroots bailout funds and Black Lives Matter organizations, from tens of millions of individuals via online fundraising campaigns for cash donations
Reed Hastings, Netflix	\$120M	To fund student scholarships, distributed evenly between the United Negro College Fund, Spelman college, and Morehouse college
Michael Jordan, Jordan brand, and Nike	\$100M	To support organizations dedicated to racial equality, social justice, and access to education
Apple	\$100M	To fund criminal justice reform and expand economic and educational opportunities for people of color

The Ford Foundation is included in our calculation but not in the table as grantees have not been announced. Other \$100M funders include: SoftBank Group Corporation, Sony Corporation, Walmart, and Warner Music Group Corporation.

# REGIONAL SNAPSHOT: THE MASSACHUSETTS PHILANTHROPIC LANDSCAPE

# THE MASSACHUSETTS PHILANTHROPIC MARKET



## Massachusetts Overview

**6.9 M** total population

**39.5** median age

**44%** Bachelor's degree or higher

**\$79,800** median household income

**\$400,700** median owner-occupied property value

## Philanthropic Giving Breakdown

**\$5.2B** in total philanthropy

**\$5,080** average giving per itemizer

**2.4%** average giving ratio

## GIVING BY TOP 5 COUNTIES

Rank	County	Total Giving	Amount Per Itemizer
1	Middlesex	\$1,788,931,000	\$6,376
2	Suffolk	\$1,000,791,000	\$12,466
3	Norfolk	\$908,247,000	\$6,657
4	Essex	\$408,211,000	\$3,344
5	Worcester	\$314,335,000	\$2,633

# NONPROFITS IN MASSACHUSETTS

There are over 50,318 nonprofit organizations in Massachusetts.



Over **456,000** employees, almost 17% of the workforce



Nearly **\$335B** in total assets of registered nonprofit organizations



**\$5B** in gifts from Massachusetts residents, representing 2.4% of household income



**\$118.8B+** total revenue generated per year

Source: [The Independent Sector](#)



# SIGNIFICANT PHILANTHROPY IN 2019

## A SELECTION OF \$1M+ GIFTS FROM MASSACHUSETTS DONORS

Donor	Recipient	Gift Amount
Phillip T. (Terry) and Susan Ragon	Massachusetts General Hospital (Ragon Institute)	\$200,000,000
David and Stacey Goel	Harvard University	\$100,000,000
Anonymous	Gordon College	\$75,500,000
James S. and Carol J. Herscot	Massachusetts General Hospital	\$50,000,000
Frank and Barbara Resnek	Brigham and Women's Hospital	\$20,200,000
C. Jean & Myles McDonough Charitable Foundation	Worcester Art Museum	\$10,000,000
John and Eilene Grayken	South Shore Health	\$10,000,000
Mrs. Maureen Wilkens	Cape Cod Community College	\$5,000,000
John Legere and Friends	Dana Farber Cancer Institute	\$4,500,000
Brian and Pamela Barefoot	Babson College	\$2,000,000
Douglas and Cynthia Crocker	New Bedford Whaling Museum	\$1,500,000
The Priebatsch Family	Community Boating Inc.	\$1,000,000
Diane and Robert Hildreth	University of Massachusetts Boston	\$1,000,000
Ellen Poss	The Theatre Offensive	\$1,000,000

Source: [MGH](#), [Cape Cod Community College](#), [Chronicle of Philanthropy](#), [Dana Farber](#), [Community Boating](#), [UMass Boston](#), [The Theatre Offensive](#), [Big Charitable Gifts](#)

# MASSACHUSETTS FUNDER INSIGHTS

Funder	Details
<b>The Boston Foundation</b>	<ul style="list-style-type: none"> <li>• \$152,767,000 in Annual Giving</li> <li>• Offer grants for arts and culture, education, neighborhoods and housing, jobs and economic development, and nonprofit effectiveness.</li> <li>• The COVID-19 Response Fund has made \$25,000 grants to more than 210 organizations. The fund has now distributed over \$6 million in ten rounds of grants since the end of March. To date, the COVID-19 Response Fund at the Boston Foundation has raised more than \$9.5 million from more than 900 companies, private and family foundations, donor-advised funds, and individual or group gifts.</li> </ul>
<b>Barr Foundation</b>	<ul style="list-style-type: none"> <li>• \$81,862,000 in Annual Giving</li> <li>• They have grant applications available throughout the calendar year.</li> <li>• They have responded to COVID-19 by releasing \$2.6 million to community foundations and pooled funds, and another \$2 million with a focus on immigrant-serving organizations.</li> <li>• They are a private, Boston-based foundation with core programs in arts and creativity, climate, and education.</li> </ul>
<b>GE Foundation</b>	<ul style="list-style-type: none"> <li>• \$71,032,000 in Annual Giving</li> <li>• Foundation branch of General Electric, a multi-sector energy, digital, and manufacturing company.</li> <li>• Focus on education and skills, developing health, and have other philanthropic initiatives in disaster and humanitarian relief, ongoing corporate contributions, and volunteer initiatives.</li> </ul>
<b>The Klarman Family Foundation</b>	<ul style="list-style-type: none"> <li>• \$60,160,000 in Total Annual Giving</li> <li>• Top priority is to “identify areas of unmet need and to advance solutions to addressing them”. Areas of focus are health and illness, democracy, Greater Boston enrichment, and the global Jewish community.</li> </ul>
<b>Nellie Mae Education Foundation</b>	<ul style="list-style-type: none"> <li>• \$30,435,000 in Total Annual Giving</li> <li>• Their focus is excellence and equitability in public education for youth.</li> <li>• In the COVID-19 era, their grantee partners have added flexibility, including the ability to convert restricted funds to general operating support or COVID-19 response, the option to request earlier-than-scheduled payments, and the opportunity to submit a brief final report in lieu of an extensive one.</li> </ul>
<b>The Liberty Mutual Foundation</b>	<ul style="list-style-type: none"> <li>• \$25,000,000 in Total Annual Giving</li> <li>• The focus of their charitable giving is to "invest in community initiatives dedicated to empowering individuals who are experiencing homelessness, advancing access for people with disabilities, and expanding educational opportunities for underserved students."</li> </ul>

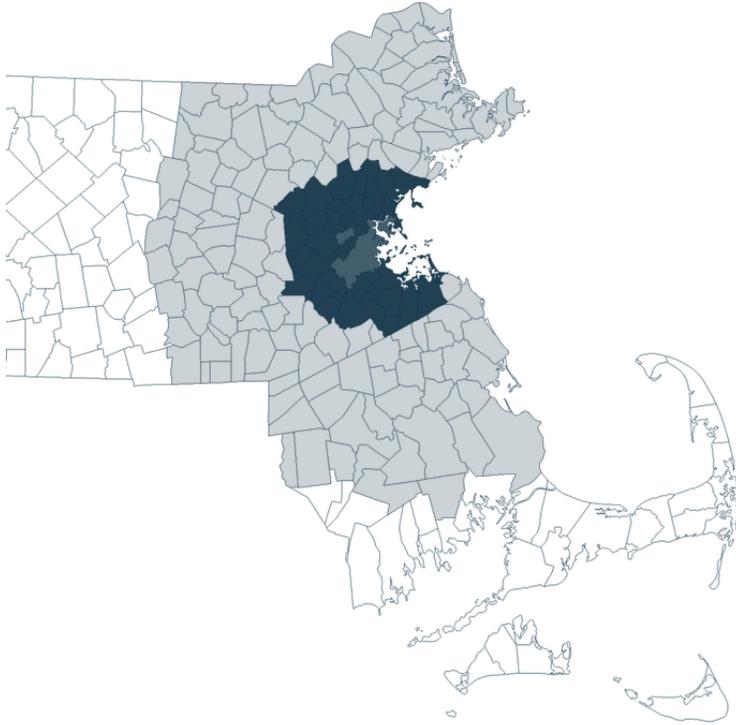
# TOP MASSACHUSETTS FOUNDATIONS

## MASSACHUSETTS FOUNDATIONS OUTSIDE THE BOSTON METRO AREA

Foundation	City/Town	Total Giving	Total Assets
Proteus Fund, Inc.	Amherst	\$15,919,000	\$29,981,200
Harold Grinspoon Foundation	Agawam	\$12,990,500	\$640,851,200
The George I. Alden Trust	Worcester	\$8,862,000	\$188,703,000
Community Foundation of Western Massachusetts	Springfield	\$8,653,400	\$146,127,800
Stoddard Charitable Trust	Worcester	\$4,577,000	\$85,354,300
C. Jean & Myles McDonough Charitable Foundation	Worcester	\$3,573,200	\$625,500
Marine Biological Laboratory	Woods Hole	\$3,323,900	\$211,088,800
The Casey and Family Foundation	Harvard	\$3,208,500	\$40,911,700
Community Foundation for Nantucket	Nantucket	\$3,085,700	\$9,106,700
The Frances Fund, Inc.	Northampton	\$2,805,000	\$6,873,000
Hermann Foundation, Inc.	Worcester	\$2,706,700	\$64,002,400
Cape Cod Foundation, Inc.	South Yarmouth	\$2,680,800	\$38,241,300
Community Foundation of Southeastern Massachusetts	New Bedford	\$2,317,500	\$36,391,900
Peace Development Fund	Amherst	\$2,101,500	\$2,277,400
Rx Foundation	Hadley	\$1,996,200	\$38,398,825

# REGIONAL SNAPSHOT: THE BOSTON PHILANTHROPIC LANDSCAPE

# THE GREATER BOSTON PHILANTHROPIC MARKET



## Boston Metro Area Overview

- 4,700,000** total population
- 38.8** median age
- \$88,700** median household income
- \$464,600** median property value
- 49%** bachelor's degree or higher

## Philanthropic Giving Breakdown

- \$4.58B** in total itemized contributions
- \$5,900** average giving per itemizer
- 2.5%** average giving ratio
- 9** billionaires on the Forbes 400 list

## GIVING BY ZIP CODE

Rank	City	Zip	Total Annual Giving
1	Boston (Back Bay/South End)	02116	\$198.8M
2	Weston	02493	\$145.4M
3	Cambridge	02138	\$123.2M
4	Wellesley Hills	02481	\$118.6M
5	Chestnut Hill	02467	\$117.5M
6	Concord	01742	\$91.7M
7	Wayland	01778	\$77.2M
8	Brookline	02445	\$64.4M
9	Boston (Downtown/Beacon Hill)	02108	\$62.3M
10	Milton	02186	\$55.9M

# METRO AREA MARKET COMPARISONS

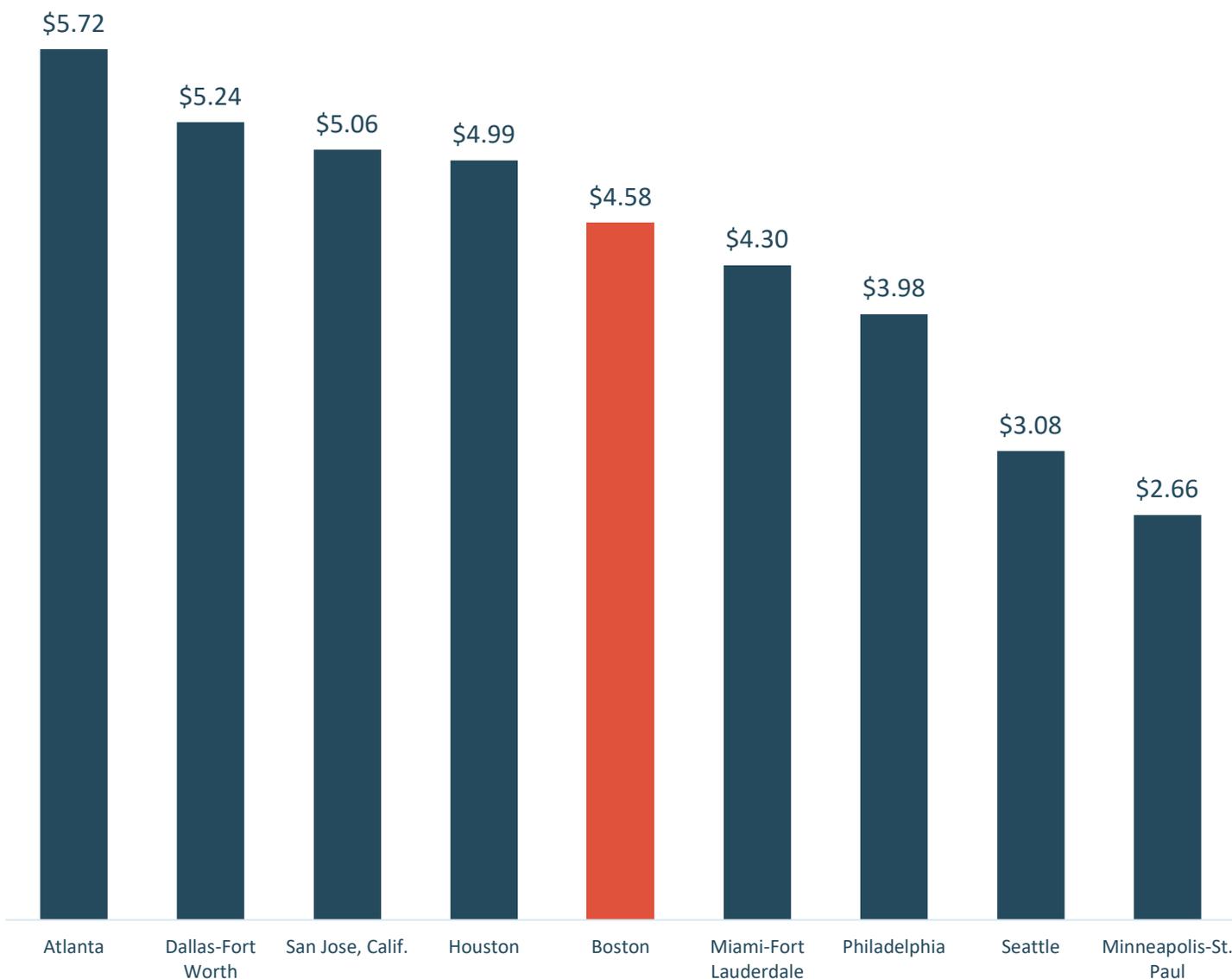
Total Philanthropy Boston Metro Area: **\$4.58 Billion.**

Boston is the **10<sup>th</sup>** most philanthropic city in the country

The top nine philanthropic cities (in order) are New York, Los Angeles, Chicago, Washington DC, San Francisco, Atlanta, Dallas-Fort With, San Jose, and Houston.

## Comparable Philanthropic Markets to Boston by Metropolitan Area

*In Billions*



# BOSTON NATIONAL COMPARISON

**\$1B**

## Giving Opportunity in Boston

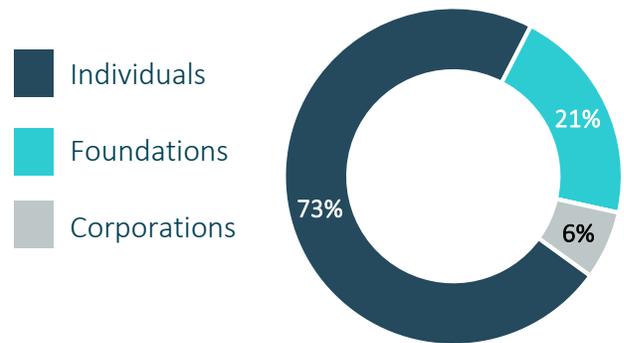
Additional gift potential if all income groups gave at the national average of percent of income at each income level

### Average Percentage Of Income Given



### National Contributions by Source

### Boston Contributions by Source



### National vs. Local Comparison

National Average Gift: \$2,514

Boston Metro Area Average Gift: \$5,885



# BOSTON'S NONPROFIT SECTOR

Charity Navigator's annual market study examined a sample of 265 Boston area nonprofits on their financial, accountability, and transparency practices.

- 79.3%** Average annual program expenses, as percentage of budget
- 8.4%** Average fundraising expenses, as percentage of budget
- \$0.10** Average cost to raise \$1.00
- 38.2%** Have a donor privacy policy
- \$144,436** Average CEO compensation

## A Selection of Organizations Included in Analysis

**HUMAN SERVICES:** The Asperger-Autism Network, Big Brother Big Sisters of Mass. Bay, Boston Rescue Mission, Jobs for the Future, Wellspring House

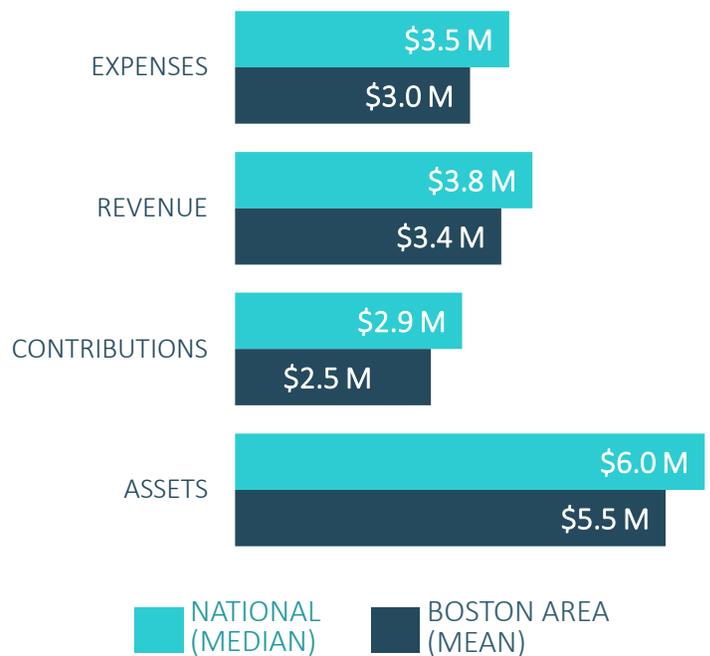
**INTERNATIONAL:** The Abraham Fund Initiatives, Jumpstart

**RESEARCH AND PUBLIC POLICY:** Clean Air Task Force, MassINC

**ENVIRONMENT:** Ceres, Mass Horticultural Society, Second Nature

**COMMUNITY DEVELOPMENT:** Center for Women & Enterprise, Combined Jewish Philanthropies, South Shore Habitat for Humanity

## Financial Information



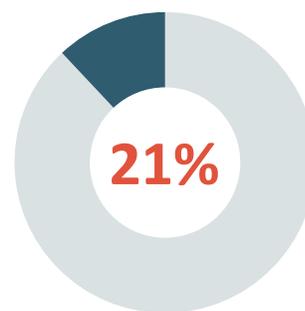
# FOUNDATION GIVING IN BOSTON

The Boston Metro Area is the **6th largest** foundation philanthropy market in the United States.

Foundation giving accounts for **\$1.45 billion** of the Boston Metro Area's philanthropic market. Similar philanthropic foundation markets include Philadelphia (\$1.28B), and Washington DC (\$1.16B).

## Types of Foundations

Some foundations could be classified as more than one type; a single foundation could be both a public and a community foundation, for example.



of philanthropy comes from foundations

- **Private Grantmaking:** Includes most of the nation's largest foundations; generally established by individual donors or donor families; non-governmental and nonprofit (e.g. The Klarman Family Foundation)
- **Private Operating:** They use a majority of their resources to provide charitable services or run charitable programs of their own (e.g. Steppingstone Foundation)
- **Private Independent:** Private foundations that make grants based on charitable endowments (e.g. Dejesus Family Charitable Foundation)
- **Public:** Organizations that derive their funding or support primarily from the general public in carrying out their social, educational, religious or other charitable activities serving the common welfare (e.g. The Boston Foundation)
- **Corporate:** Grant funds are derived primarily from the contributions of a profit-making business organization (e.g. TJX Foundation)
- **Community:** Raise funds from the public and engage in grantmaking, primarily within a defined area (e.g. Brookline Community Foundation)

# TOP BOSTON AREA FOUNDATIONS

## TOP BOSTON METRO AREA FOUNDATIONS BY TOTAL GIVING

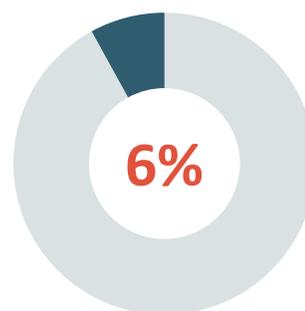
Foundation	City/Town	Total Giving	Total Assets
President and Fellows of Harvard College	Cambridge	\$765,837,205	\$55,084,581,000
Combined Jewish Philanthropies of Greater Boston	Boston	\$148,008,936	\$1,621,577,900
The Boston Foundation, Inc.	Boston	\$130,105,000	\$1,257,657,000
The Barr Foundation	Boston	\$81,909,300	\$1,806,028,500
Beth Israel Deaconess Medical Center, Inc.	Boston	\$78,518,400	\$2,201,487,900
Klarman Family Foundation	Boston	\$60,160,200	\$759,881,300
GE Foundation	Boston	\$59,443,000	\$12,561,800
The Morningside Foundation	Newton Centre	\$51,679,300	\$10,927,800
United Way of Massachusetts Bay, Inc.	Boston	\$33,841,500	\$57,598,700
Phillip and Susan Ragon Foundation	Cambridge	\$31,121,000	\$232,791,000
State Street Foundation, Inc.	Boston	\$20,869,600	\$8,595,200
Essex County Community Foundation	Danvers	\$20,374,400	\$91,073,500
Richard & Susan Smith Family Foundation	Newton	\$13,877,200	\$306,079,800
OneWorld Boston	Woburn	\$11,623,300	\$421,799,900
Mooney-Reed Charitable Foundation	Wellesley	\$11,365,200	\$117,506,400
John Merck Fund	Boston	\$10,295,000	\$29,343,200
Edward P. Evans Foundation	Newton	\$10,106,900	\$315,791,300
The McGovern Foundation, Inc.	Boston	\$10,080,500	\$1,213,426,900

# CORPORATE GIVING IN BOSTON

Corporate giving accounts for **\$454 million** of Boston Metro Area's philanthropic market.

## Regional Highlights

- Gross domestic product of the Boston Metro Area is **\$428.2 billion**
- **6th largest** corporate philanthropy market
- **63 Fortune 1000** companies in the metropolitan area including: General Electric (#13), Liberty Mutual Insurance (#75), Raytheon (#116), Biogen (#248), State Street Corp. (#271) and Wayfair (#666)
- Similar corporate philanthropy markets include Philadelphia (\$447.3M), Atlanta (\$396.2M), San Francisco (\$380.0M), and Minneapolis (\$320.2M)



of philanthropy comes from corporate giving

## SELECT TOP CORPORATE FUNDERS IN BOSTON



# TOP BOSTON CORPORATE FOUNDATIONS

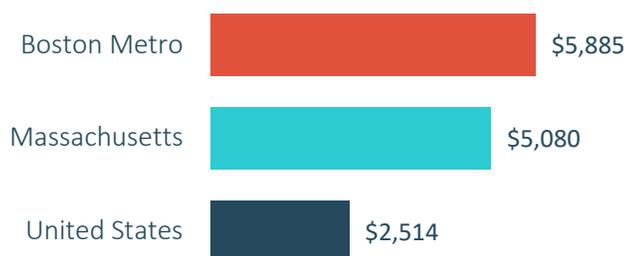
## Top 20 Corporate Charitable Contributors in 2018 MA Cash Contributions

Foundation	Total Giving
Granite Telecommunications LLC	\$24,248,800
Cummings Properties/Cummings Foundation	\$20,492,500
Liberty Mutual Insurance Group	\$16,136,300
State Street	\$15,055,100
GE	\$12,300,000
Blue Cross Blue Shield of Massachusetts	\$12,058,900
Bank of America	\$11,700,000
Eastern Bank	\$10,940,300
Wells Fargo	\$10,371,700
John Hancock	\$8,100,000
Suffolk	\$7,759,200
Massachusetts Mutual Life Insurance Co.	\$7,122,100
JP Morgan Chase	\$6,700,000
New Balance Athletics	\$6,242,800
Boston Red Sox/Red Sox Foundation	\$5,864,300
Vertex Pharmaceuticals	\$4,602,300
Biogen	\$4,542,900
Santander US	\$4,497,500
Tufts Health Plan	\$4,002,000

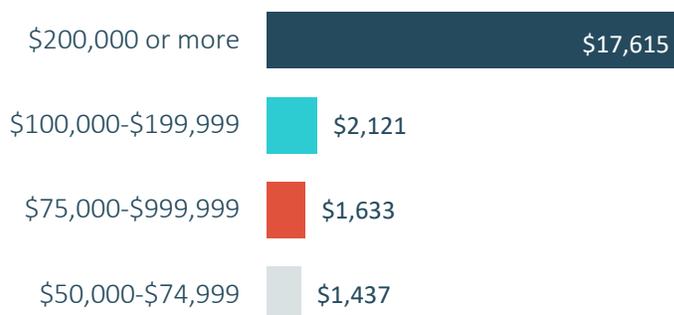
# INDIVIDUAL GIVING IN BOSTON

Individual Giving accounts for **\$5.04 billion** of the Boston Metro Area's philanthropic market.

## AVERAGE HOUSEHOLD CONTRIBUTION



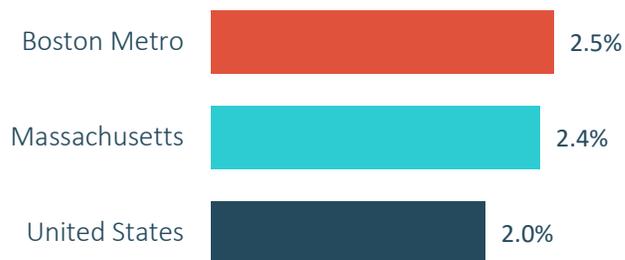
## AVERAGE CONTRIBUTIONS BY INCOME LEVEL



## MEDIAN HOUSEHOLD INCOME



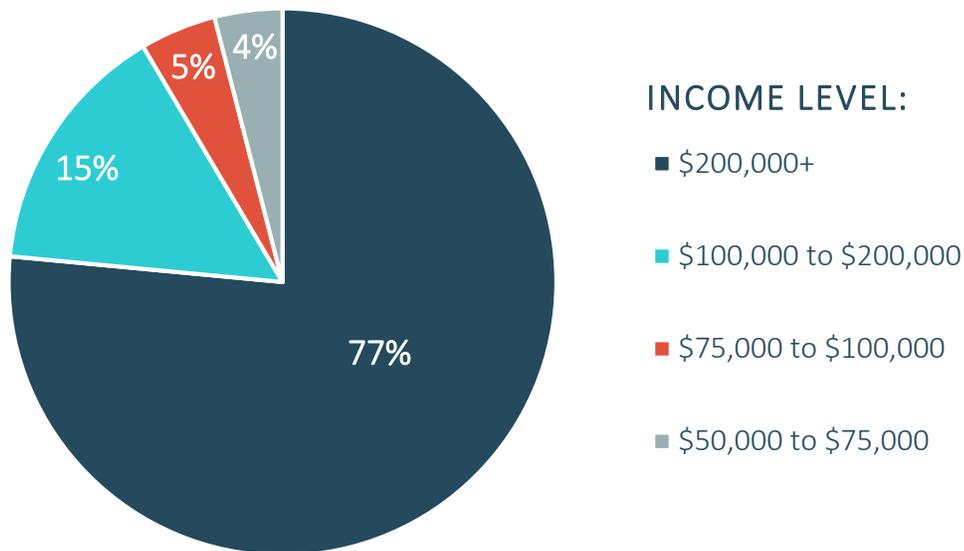
## PERCENTAGE OF INCOME GIVEN



Similar individual philanthropic markets include San Francisco (\$6.12B), Atlanta (\$5.82B), Philadelphia (\$4.97B), Seattle (\$3.61B), and Minneapolis (\$3.1B).

# WEALTH IN BOSTON

## Total Giving in the Boston Metro Area by Income Level\*



Residents of the Boston Metro Area who make over \$100,000 contribute 91% of all local charitable dollars.

### BOSTON AREA'S WEALTHIEST ZIP CODES

Zip Code	City	Average Adjusted Gross Income	US Rank
02110	Downtown Waterfront	\$622,600	18
02108	Beacon Hill	\$519,700	37
02116	Back Bay	\$480,600	50
02199	Back Bay	\$477,900	52

\*Data based on giving by taxpayers who make more than \$50,000 a year in adjusted gross income and itemize deductions on their income-tax returns.

# PHILANTHROPIC TRENDS: BIOTECH

## Overview of the Biotech Industry in Boston

**\$11.9B** total wages of area employees

Over **113,000** biopharma and biotech jobs

Over **430** biotech companies

### Spotlight: Vertex

In 2017, Vertex Pharmaceuticals announced the creation of its Vertex Foundation and committed \$500M over 10 years to cystic fibrosis, STEM education for underserved students and young women, and development initiatives for young physicians and scientists. They extended an additional 10 years of collaboration with Boston Public Schools to ensure access to the Vertex 3,000 square foot learning lab, mentoring and internship opportunities, and full four-year scholarships to the University of Massachusetts.

### Spotlight: Life Science Cares

Life Science Cares is “a collective effort of the Life Science industry to eliminate the impact of poverty on our neighbors in the greater Boston area”. Recent initiatives have included:

- Partnering with the Madison Park Development Corporation to launch support for minority and women-owned contractors.
- Establishing a COVID-19 Response fund, which has raised \$1.75M, dispersed to 27 nonprofits so far, with support from top Boston biotech companies.

### Watch This Space: Chinese Investment in Boston-area Biotechnology

In February, Chinese real estate giant China Evergrande Group gave \$115 million to a consortium of Boston-area university and pharmaceutical researchers to collaborate with the Guangzhou Institute for Respiratory Disease. The consortium consists of Harvard Medical School, MIT, and Boston University's National Emerging Infectious Disease Laboratory (NEIDL), in addition to several other area biotechnology firms.

This is the largest COVID-19 related gift in Massachusetts and is one of the largest COVID-19 gifts to-date nationwide.

This cooperative effort follows in the footsteps of the Evergrande Center for Immunologic Diseases at Brigham and Women's Hospital and Harvard Medical School.

# REGIONAL SNAPSHOT: COVID-19 RESPONSE

Massachusetts nonprofits report that they have lost **\$8.6 billion** in revenue during COVID-19 and **52%** report that they have shed jobs.

Across the state, philanthropists have responded through supporting special COVID-19 response funds and the nonprofits and missions that they care about.

# THE COMMONWEALTH OF MASSACHUSETTS COVID-19 RELIEF FUND

*As of June 29, 2020*

## ABOUT THE FUND

The Massachusetts COVID-19 Relief Fund supports those most affected by the pandemic. The Fund focuses on essential frontline workers and at-risk populations including the homeless, immigrant populations, people with disabilities, and food insecurity. Working with regional community foundations and nonprofit leaders, the Fund's focus is on understanding the local response and relief to fill in gaps where needed most.

## IMMEDIATE IMPACT

The Massachusetts COVID-19 Relief Fund has raised **\$30.8 million** to date and awarded **\$22.9 million** in support. Funds awarded have been distributed to 13 community foundations, supporting 476 nonprofit organizations throughout the state, as well as 5 organizations addressing food insecurity statewide.



## MASSACHUSETTS COVID-19 RELIEF FUND

### FOUNDING CONTRIBUTORS

Ernie Boch, Jr. | Charlesbank Capital Partners | Chris and Lisa Collins | Eastern Bank | The Edgerley Family Foundation | Paul and Phyllis Fireman Charitable Foundation | The Frieze Family Foundation | Liz and Phill Gross Rob and Karen Hale | William Helman | Klarman Family Foundation | Lynch Family Foundation | Mannion Family Foundation | David and Marion Mussafer | MFN Partners | The Mittelman Family | One8 Foundation Maurice and Luly Samuels | Stephanie and Brian Spector | Michael and Jill Stansky Family Foundation | TJX

### LEADING CONTRIBUTORS

Abrams Capital | Amazon | Ameresco, Inc. | Ansin Foundation | Blue Cross Blue Shield of Massachusetts | Boston Bruins Charitable Foundation and the Boston Bruins | Boston Celtics Shamrock Foundation and the Boston Celtics | Cisco | Cummings Foundation | Randi and Joel Cutler | Will and Amy Danoff | Nina and David Fialkow | Mike and Christina Gordon | Bill and Kelly Kaiser | Mark and Donna Leventhal | Carl Martignetti | Joe and Lauren Mazella | The Milford Street Fund | Pfizer | Red Sox Foundation | Reynolds Family Foundation | Paul and Ann Sagan | Jeremy & Kerry Sclar Family Fund | Barbara and Ed Shapiro | Sperling Family Charitable Foundation | State Street | Jennifer and Seth Stier | Candice and Howard Wolk/Wolk Family Endowment for Individuals and Families in Distress at CJP | The Winn Family and the Curtis Family

# COVID-19 LOCAL RESPONSE HIGHLIGHT: FOUNDATION FOR METROWEST

The Foundation for MetroWest, the community foundation serving the cities and towns of the MetroWest region of Massachusetts, created two emergency funds to provide rapid response to their communities affected by COVID-19.

## TWO FUNDS

### MetroWest Emergency Relief Fund

This fund provides financial resources to MetroWest-based nonprofit organizations impacted by COVID-19. Operating grants are awarded on a weekly rolling basis with priority given to organizations who are providing emergency basic needs to the most vulnerable residents, families, and youth across the region.

### Feed Framingham COVID-19 Fund

In partnership with the City of Framingham and Framingham Public Schools, this fund will provide critical financial support to nonprofit organizations who are helping to ensure access to food and basic hygiene necessities to vulnerable populations across the city of Framingham.

## LEADING CONTRIBUTORS

Ajana Foundation  
Amelia Peabody Charitable Fund  
Barr Foundation  
Bowditch and Dewey  
Digital Federal Credit Union  
Eastern Bank Charitable Foundation  
MetroWest Health Foundation  
Middlesex Savings Charitable Foundation  
The Sudbury Foundation  
Tripadvisor Foundation

## FUNDER INSIGHT

“For 25 years, the Foundation for MetroWest has served as a central resource for this community and the local nonprofits that provide essential resources for our neighbors,” said Judy Salerno, Executive Director of the Foundation for MetroWest. “These first grants reflect the strong partnerships we have built across our region and the amazing work being done in our communities to care for all our neighbors. These efforts will provide critical resources for community organizations on the front lines of the COVID-19 pandemic, helping to support our most vulnerable populations during this challenging time.”

- Foundation for MetroWest Press Release, April 2020

# INDIVIDUAL GIVING: COVID-19

Nationally, individual giving accounts for 68% of total giving. While the majority of individual gifts are not publicized, there have been some remarkable individual gifts in the Boston Metro area in response to the COVID-19 pandemic. A few examples of these extraordinary gifts include:



## **BOYS AND GIRLS CLUB OF BOSTON:**

Phill and Liz Gross donated \$1 million to the Boys and Girls Club of Boston.



## **MASS GENERAL'S COVID-19 FUND:**

The Irving family, Donald Sussman, and James Taylor each donated \$1 million to Mass General's COVID-19 fund.



## **MASS GENERAL & MASS EYE AND EAR:**

Celtics co-owner Wyc Grousbeck donated \$1 million toward efforts to develop a COVID-19 vaccine at Mass General and Mass Eye and Ear.

# ADDITIONAL LOCAL COVID-19 RESPONSE FUNDS

As of June 29, 2020

Below are additional COVID-19 Funds throughout Massachusetts supporting those most impacted by the COVID-19 Crisis.

	<p>The Boston Foundation is hosting the COVID-19 Response Fund which provides one-time operating grants to nonprofits that support seniors, communities of color, immigrants, and other vulnerable populations affected by the pandemic. The COVID-19 Response Fund has made \$25,000 grants to more than 200 organizations. The fund has now distributed over \$6 million in ten rounds of grants since late March. To date, the COVID-19 Response Fund at the Boston Foundation has raised more than \$9.5 million from more than 900 companies, private and family foundations, donor-advised funds, and individual or group gifts.</p>
	<p>The Boston Resiliency Fund represents the City of Boston's philanthropic response to provide essential services to those most affected by the pandemic, as well as assisting first responders and critical care providers. The Fund focuses on providing food for children and seniors, technology for remote student learning, services for the homeless, and support to first responders and healthcare workers. The Fund has raised \$32.3 million to date and awarded \$20.6 million in 12 rounds of grants to over 260 nonprofit organizations.</p>
	<p>United Way founded the COVID-19 Family Support Fund to support and be a resource for working families affected by the pandemic. With its wide network of nonprofit agencies throughout the region, the Fund will provide financial assistance to help families through this crisis for basic needs including food, childcare, and housing. By mid-May, \$7 million was committed by more than 6,700 donors. So far, \$4 million has been distributed to 158 community-based organizations.</p>
	<p>Combined Jewish Philanthropies (CJP) recognized the considerable, and often immediate, needs faced by its community during this crisis, particularly for vulnerable populations such as the socially isolated, those in poor health, or in financial need. In response, CJP created the CJP Coronavirus Emergency Fund whereby 100% of funds raised will support community members facing hardship as a result of this pandemic. As of late May, over \$2.16 million has been raised from more than 1,400 gifts.</p>

# CORPORATE GIVING: COVID-19

## Select Boston-based Gifts of \$1M+

### Liberty Mutual: \$15M

Including \$1M for the Boston Resiliency Fund and \$4M for 450 current nonprofit partners, the corporation pledged \$10M to six human service and health care organizations that serve those experiencing poverty, homelessness, and hunger.

### The Vertex Foundation: \$5M

These funds will help organizations that are providing emergency relief and assistance in the global communities where Vertex employees live and work, with a focus on providing health care and supplies and support for vulnerable populations.

### Harvard Pilgrim Health Care: \$3M

As part of its initial \$3 million distribution of funds, the Foundation has committed dedicated resources to community-focused initiatives including the engagement of select restaurants in the region to provide and deliver take-out meals to families in need and helping to put people back to work. Resources will assist communities in facilitating access to COVID-19 testing.

### Eastern Bank: \$10M

Eastern Bank Charitable Foundation will target \$3 million in financial support to area nonprofit partners focused on COVID-19 relief, while Eastern Bank has created two loan funds that will provide a total of \$7 million to its individual and small business customers experiencing financial hardship as a result of COVID-19.

### New Balance Foundation: \$2M

The \$2M pledge includes \$200k in international relief, and \$100k to No Kid Hungry. Another \$200k has gone to the Boston Resiliency Fund, Groundwork Lawrence (MA), and food banks in Maine and St. Louis. Another \$1.5M will be given to existing grantees.

**CCS INSIGHTS:  
NAVIGATING THE CHALLENGES  
PRESENTED BY COVID-19**

# ORGANIZATION INSIGHT: TUFTS MEDICAL CENTER

Maura Lynch, Vice President for Development at Tufts Medical Center and Executive Director of the Tufts Medical Center Trust, shares how Tufts Medical Center responded to COVID-19 and how she envisions the role of philanthropy in the future.

## How is Tufts Medical Center responding to COVID-19?

Our single goal in this pandemic: to save as many lives as possible while protecting the health and safety of our workforce. Tufts Medical Center opened its COVID-19 Command Center on January 21 and began preparing for the inevitable community spread of the virus and anticipated surge of infections and hospitalization. Teams were mobilized to increase the hospital's ICU capacity and secure PPE through procurement and donations. We entered the critical surge phase of the pandemic, a period when many of our region's sickest patients with COVID-19 were transferred to our intensive care units from hospitals closer to their homes. It was a period when, in the wake of the crisis in New York City, our concerns about resources ran high, particularly around ICU and critical care staff capacities, and the inventory of respirators and PPE. With great thanks to our philanthropic community, Tufts University, Tufts Medical and Dental Schools, MIT, and others, no patient has gone without the resources needed to give them the best possible chance for survival and recovery from COVID-19, and no staff member has gone without the PPE needed to keep them protected in their heroic efforts.



Maura Lynch, Vice President for Development at Tufts Medical Center and Executive Director of the Tufts Medical Center Trust

## What do you think the future of philanthropy looks like?

I believe that the philanthropic community is a major partner to healthcare systems. Moving forward, philanthropists will look for strong collaborations among major health institutions, community hospitals, and research institutions. They will act swiftly in their decision-making.

No individual, community, city, state or nation has been left untouched by this pandemic. There will need to be investments made to accelerate the therapeutic protocols and ultimately discover the vaccine. There is also need for parallel investments in public health and racial disparities in health care. As we all have seen, the pandemic has brought to the forefront the significant health disparities of black and Latino communities, especially in our dense urban areas. The disproportionate burden of the disease in our vulnerable communities and populations cannot be seen as separate. Philanthropy must work to address the structural racism in our healthcare system.

# ORGANIZATION INSIGHT: THE DIMOCK CENTER

CCS corresponded with Raquel Rosenblatt, Chief Development Officer at The Dimock Center, to discuss Dimock's response to the COVID-19 pandemic, the national environment, and re-emergence from modified operations during quarantine.

## How did Dimock respond to the COVID-19 pandemic?

Dimock responded by maintaining our core services and expanding to meet growing needs. We kept our regular programs to provide support for Substance Use Disorder and homelessness, and switched to telehealth for other mental and physical health services. We started an emergency fund, which supported a new Meal Distribution Program on Tuesday and Friday mornings, the building of a physical shed-sized test building at our center to offer free COVID-19 tests, a combined COVID-19/Substance Use Disorder treatment unit, and a Contact Tracing Program to connect exposed individuals to testing and primary care at Dimock.



Emergency meal distribution at Dimock during COVID-19

## Do you have any insights on the current national environment from the perspective of your organization and community?

The COVID-19 pandemic has hit people of color especially hard. The percentage of known COVID-19 positive cases and COVID-19 deaths among individuals who identify as African American is 42% and 31% respectively, while the proportion of Boston's general population that identifies as African American is 25%. Roxbury, Dorchester, Mattapan, and Hyde Park, all COVID-19 'hot spots' with disproportionately higher infection rates, are within Dimock's core service area. The pandemic has revealed already-present health disparities that have existed in our communities. We are committed to focusing on health access, mental health, and other programming that supports our community members that need it most.

## What does re-emergence look like for Dimock?

We will ensure access to our programs and plan on hiring mental health professionals to account for an increase in need. In terms of fundraising, we will concentrate on communicating transparently and regularly. We plan to constantly let donors know what is challenging in our community and how we are working to change it. While we will be hosting our annual fall gala virtually this year, we will emphasize what donor dollars are doing to address the long-term implications of the crisis.

# BOARD MEMBER INSIGHT

Dr. Myechia Minter-Jordan, board member of The Boston Foundation and President and CEO of DentaQuest Partnership for Oral Health Advancement and Catalyst Institute, shares thoughts on the future of philanthropy with attention to current events and social justice.

## How do you think current events are influencing the future of philanthropy?

In Boston specifically, we have been fortunate enough to see strong collaborations across institutions, non-profit organizations, and funders to act quickly and deploy services. Current events have also highlighted the significant disparities within our region. I am hopeful there will be continued progression to develop thoughtful and systemic approaches based on data and research. It is crucial that we respond to the organizations doing the work directly in our communities so that we can address inequities at their root.

## What are some ways we can strengthen the philanthropic community moving forward?

It is important that we continue and increase communication with donors. More than ever, we should be positioning our non-profit organizations as a resource. Convene your stakeholders to share recommendations with them and motivate them to act. Organizations have the ability to make an impact by communicating to supporters the importance of informed decision making. As experts in the field, we need to share the data and information from our experiences on the frontline of our work. From the foundation perspective, there is considerable importance in listening to our grantees and establishing long-term relationships. If we can spend time fully hearing from organizations and working collaboratively to develop a systems approach, there will be a greater and faster response in times of crisis and challenge. We must prioritize these relationships and actively seek their perspective. When you listen, you learn.



Dr. Myechia Minter-Jordan, Board Member, The Boston Foundation; President and CEO, DentaQuest Partnership for Oral Health Advancement and Catalyst Institute

## You recommend a "systems approach" to better serve our communities. Could you share a bit more about this method?

A systems approach is an alternative way for organizations to employ their programmatic work. It focuses less on serving the immediate issue at hand, but rather why the issue might exist in the first place and what systems created them. We need to understand the processes that inform the systems through educating ourselves. In terms of the bigger picture, we can further our understanding by looking at the local level and paying attention to grassroots organizations. It is important we engage people along the way, too, with realistic expectations. If we can make change at the core, we will see the most progress.

# PHILANTHROPIST INSIGHT

Sue Curtin, Chair at the National Coast Guard Museum Association and President of a private family foundation, shares how she approaches times of crisis and uncertainty as a philanthropist.

**As a philanthropist and the president of a private family foundation, how do times of crisis or great uncertainty influence your decision-making?**

The needs in our community are always great, complex, and never-ending. And all the work being done to address those needs is important. One thing I've personally struggled with over the years is how to prioritize and focus when the needs are so great. I've learned to give myself permission to be comfortable with the notion that I can't do everything or solve every problem. During times of great challenge, like now, it's tempting to switch gears. But to have the most impact, you have to be disciplined in your approach and stay true to your values all while being open-minded to learning.

**What advice do you share with other philanthropists who are challenged with the same issue?**

We encourage every member of our family foundation's board to do a deep dive with their discretionary funds and really build what I call a "practice of philanthropy." That means taking responsibility for educating yourself on the issues that you care about and then finding organizations that are doing great work in those spaces. Once you've done that, building long-standing relationships, both with the organization and its leadership, is key. I truly believe that serving in a leadership role on a Board makes you a better philanthropist. You see the day-to-day challenges of an organization and have a better understanding of what drives decision making.



A digital rendition of the National Coast Guard Museum, where Sue serves as board chair

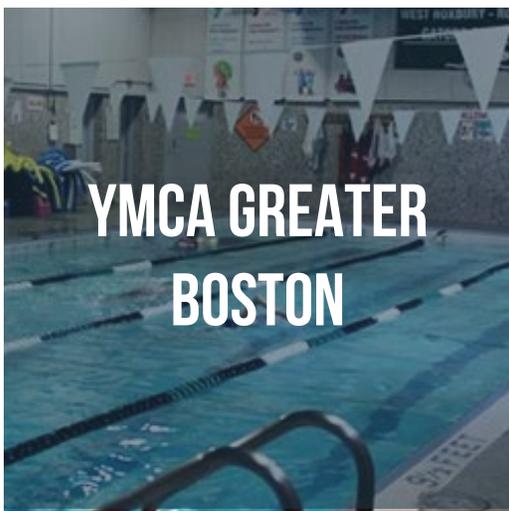
**In your own personal practice of philanthropy, how are you working with organizations as they navigate the pandemic?**

If you've done the consistent work of developing long-standing relationships and staying informed, there's a great deal of trust. In our foundation work, we are trying to be as flexible as we can to help organizations we care about get through this. For us, this crisis has demonstrated that the work of the nonprofits that we support is more important than ever. We've been focusing on staying true to our values and carrying those forward to the extent we can control. If you have done this work in advance of a crisis, you can better serve your constituencies. Now is not the time to become defeated.

# INNOVATIVE REGIONAL RESPONSES



The largest day shelter in Massachusetts, St. Francis House, on a daily basis, welcomes 500 individuals experiencing homelessness and poverty. In the COVID-19 era, we remain open and available 7 days a week. Beginning in mid-March, our services were modified in order to maintain social distancing and keep our staff and guests healthy. Our Workforce Development programs which typically meet in person, in a classroom settings, went virtual. Our basic services which have specific hours of operation and includes breakfast, lunch, showers, clothing distribution and mental health counselling, offered all-day options in order to spread out the times our guests could access these services in order to decongest areas within our shelter. In addition to sanitizing the building several times a day, we are handing out 400 masks per day to our guests and staff, and have a constant supply of hand sanitizer available.



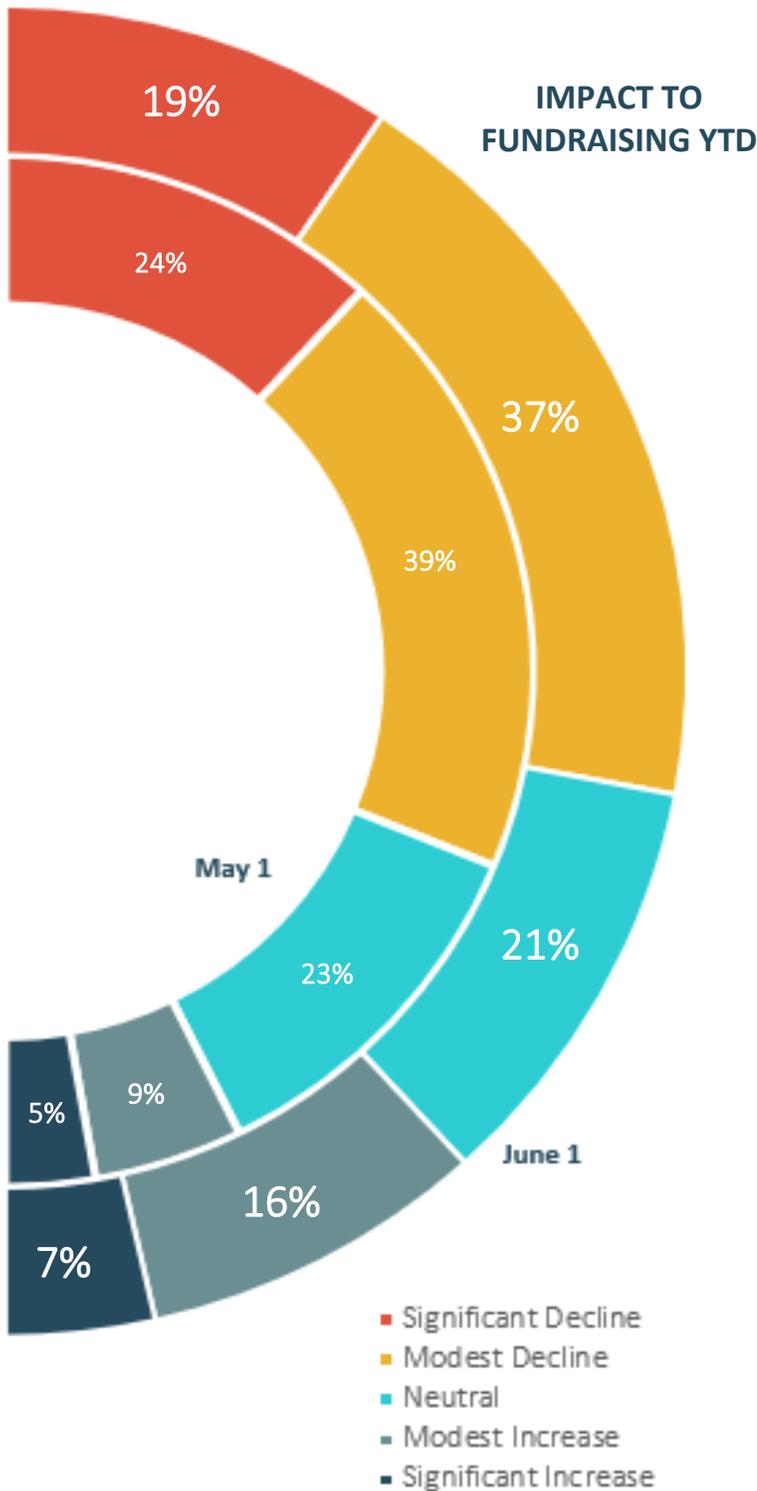
In response to COVID-19, the YMCA of Greater Boston closed all branches for fitness and aquatics and reopened them as “Emergency Child Care Centers” for the children of parents who are essential workers. The YMCA also worked with the City of Boston to prevent hunger by providing two meals a day to youth and families in need throughout Boston. All key supporters received regular updates on the organization’s efforts and outcomes. The YMCA of Greater Boston also recently held its first Together We Care Virtual Gala to showcase its COVID-19 response efforts paired with silent and live auction, raffle, and appeals for donations to raise additional support from members and the community.



As a nonprofit that relied on in-person experience, Zoo New England has had to quickly and creatively produce alternatives to fundraising and programming strategies. During the onset of COVID-19, the Zoo began a #ZooToYou social media campaign to keep the community engaged via informational and entertaining videos. They are hosting their event, A Wild Affair, virtually with a live auction, an address from the president, and virtual meet-and-greets with new animals.

# IMPACT OF COVID-19 ON FUNDRAISING

Fundraising results improved during the month of May.



While the picture is still challenging for nonprofits, when comparing the reported results from the first edition of this survey (which closed May 1) against this edition (which closed June 1), fundraising has improved markedly.

Fundraising increases have been reported by 23% of respondents, while only 14% cited increases on May 1.

Decreases to fundraising results were reported by 63% of respondents on May 1, while this number reduced to 56% for the June 1 report.

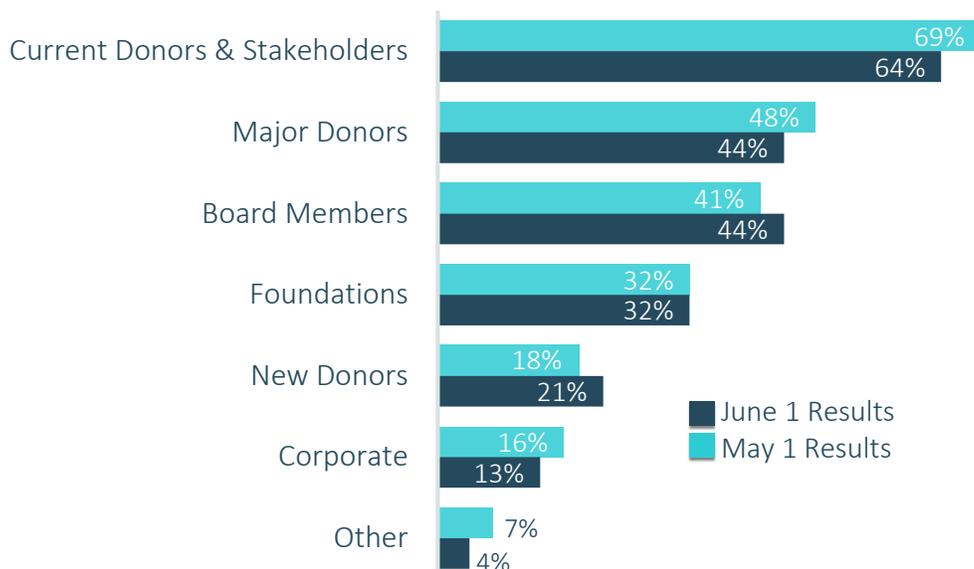
# IMPACT OF COVID-19 ON DONOR ENGAGEMENT AND SUPPORT

Donor engagement methods leveraging technology rose during the month of May, with an increased percentage of respondents citing their use of social media, virtual events, and webinars/podcasts.

## DONOR ENGAGEMENT METHODS



## PRIMARY SOURCES OF CURRENT SUPPORT



Comparing June results to May results, there were slight increases for new donors and board members coupled with decreases for current donors, major donors, and corporate donors.

# STAGES OF FUNDRAISING DURING A CRISIS

This grid details how nonprofits can approach the five core elements of fundraising during the common phases of a major crisis.

	<b>I. IMMEDIATE CRISIS</b>  <b>Areas of Focus:</b> Urgent actions and decisions; continued/modified operations; special and general appeals	<b>II. STABILIZATION</b>  <b>Areas of Focus:</b> Program modifications; reassessed short- and long-term priorities; targeted stakeholder engagement	<b>III. RE-EMERGENCE</b>  <b>Areas of Focus:</b> Campaigns and fundraising plans; metrics and evaluation
<b>CASE FOR SUPPORT</b> <i>Rationale behind your initiative (the “why”)</i>	<ul style="list-style-type: none"> <li>Establish urgent funding requirements: operating and staff support, programs, and reserves</li> <li>Draft Case narrative with supporting data</li> <li>Circulate immediate Case narrative for internal review</li> <li>Measure new elements with close advocates</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate spendable operating funds, capital, technology, endowment, and reserves</li> <li>Draft interim funding plan</li> <li>Assess short-term funding impact</li> <li>Provide updated briefings on modified operations</li> </ul>	<ul style="list-style-type: none"> <li>Reaffirm mission and vision</li> <li>Establish modified or new strategic priorities</li> <li>Set longer term funding requirements, in phases</li> <li>Draft Case for Support for the foreseeable future</li> </ul>
<b>LEADERSHIP</b> <i>Board, volunteers, executives</i>	<ul style="list-style-type: none"> <li>Create special emergency working group (administration, board, development staff, core advisors)</li> <li>Form stakeholder outreach team(s)</li> <li>Conduct CEO briefings</li> <li>Consider board challenge gifts</li> </ul>	<ul style="list-style-type: none"> <li>Assess crisis impact</li> <li>Evaluate working group roles</li> <li>Set consistent meeting schedule</li> <li>Continue briefings with key stakeholders</li> <li>Assign concrete actions to board members</li> </ul>	<ul style="list-style-type: none"> <li>Reconstitute Development Committee</li> <li>Reorganize fundraising leadership structure to support plan</li> <li>Engage leaders and board in longer-term discussions</li> <li>Review current staffing structure</li> </ul>
<b>PROSPECTS</b> <i>Your natural constituency</i>	<ul style="list-style-type: none"> <li>Segment by giving level</li> <li>Research funders whose interests align with funding requirements</li> <li>Determine the prospects most viable for immediate requests</li> <li>Migrate donors to online giving</li> </ul>	<ul style="list-style-type: none"> <li>Re-assess/prioritize prospect pool based on aligned interests and capacity</li> <li>Re-assign top prospects and establish individual plans for interim funding requests</li> </ul>	<ul style="list-style-type: none"> <li>Undertake full review of donor base and prospect pool</li> <li>Perform wealth screen, modeling</li> <li>Repopulate portfolios</li> </ul>
<b>PLAN</b> <i>Strategy and tactics for campaigning</i>	<ul style="list-style-type: none"> <li>Implement special appeals to select donors/all audiences</li> <li>Design specific fundraising strategy and outreach for each donor segment</li> <li>Engage in high-level peer requests</li> <li>Set immediate fundraising targets</li> <li>Request accelerated and increased annual support</li> </ul>	<ul style="list-style-type: none"> <li>Redesign fundraising strategy for each donor segment</li> <li>Survey donors</li> <li>Establish short-term fundraising targets</li> <li>Offer short-term gift payment options</li> <li>Determine modified program viability</li> </ul>	<ul style="list-style-type: none"> <li>Conduct surveys/focus groups</li> <li>Consider planning study or campaign</li> <li>Reassess donor base/priorities</li> <li>Establish longer-term fundraising targets</li> <li>Set multi-year funding priorities</li> <li>Assess impact evaluation tools</li> </ul>
<b>COMMUNICATION</b> <i>Outreach to all constituents</i>	<ul style="list-style-type: none"> <li>Begin outreach to close stakeholders and top donors</li> <li>Intensify communication to all constituents across channels</li> <li>Maintain consistent email updates to groups of stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Accelerate annual gift requests</li> <li>Publish regular and consistent impact reports</li> <li>Articulate successes and plan for continued growth</li> </ul>	<ul style="list-style-type: none"> <li>Revise organizational communication plan</li> <li>Circulate and enforce talking points and branding</li> <li>Redeploy marketing budget to ramp up outreach</li> </ul>

# THE FUNDAMENTALS OF CRISIS RESPONSE

## CASE

Share your immediate needs while staying true to your mission especially as you adjust your case for support.

### Reinforce your core values.

Your values should be communicated to staff, leadership, donors, and beneficiaries.

## PLAN

Identify the best case, worst case, and likely scenario for each of your critical streams of philanthropic revenue over the next 6-9 months. Engage organizational leadership, development, and key board members in that process.

## OUTREACH

Personally connect and engage with those closest to your organization.

Share updates, successes, news, plans, and ways to get involved.

Provide insight on how your organization is accommodating beneficiaries and employees.

## DEVELOPMENT PROFESSIONALS

- Become a student of how to use digital technology to encourage collaboration and authentic communication; lead the way for your stakeholders and donors.
- Ideate and share your case to demonstrate what your impact will be during and after the crisis.

## ORGANIZATIONAL LEADERSHIP

- Create and follow a strategic plan that accounts for uncertainty.
- Communicate transparently, thoroughly, and frequently with internal and external stakeholders.

## BOARD MEMBERS

- Advocate for your organization. Let your nonprofit's mission shine through now more than ever.
- Schedule regular check-ins with organizational leadership to support their fundraising needs and plans.

## PHILANTHROPISTS

- Increase flexibility while maintaining your core values and standards.
- Communicate to your grantees with empathy and transparency.
- Think creatively about how your resources can be used in new ways; leave a legacy of transformational generosity through crisis response measures.

# LOCAL AND REGIONAL RESOURCES FOR NONPROFITS

*Click logos below to explore resources*



FUNDRAISING

Offers regional and sector specific webinars and guidance papers, as well as a national perspective.



On-demand Massachusetts-focused COVID-19 webinar resources.



A variety of resources and information for development professionals and the nonprofit community.



Massachusetts specific resources for nonprofits.

# Candid.

A Guidestar resource that compiles and analyzes COVID-19 relief funds in the US, including Massachusetts.



Highlights state by state resources for nonprofits during this time.



Website provides information on other COVID-19 relief funds in Massachusetts.

# ABOUT CCS

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CCS designs and implements successful, transformative development initiatives for leading nonprofits across all sectors and throughout the world.



Founded in 1947



Provides Comprehensive Fundraising Services



300+ Permanent, Professional Staff



Offices in Boston, Chicago, Dallas, New York, Baltimore, Washington, DC, San Francisco, St. Louis, Southern California, Seattle, London, and Dublin



\$15 Billion in Campaign Goals Under Direct Management



Has Advised 40% of America's Top 100 Performing Charities

# RECENT REGIONAL CCS PARTNERSHIPS

CCS is proud to work with organizations and institutions in Massachusetts across sectors.



**WPI**



**Epiphany**

**BOSTON  
LATIN  
SCHOOL**



**BLSA**  
BOSTON LATIN SCHOOL ASSOCIATION



**OXFAM**



**BRIGHAM AND  
WOMEN'S HOSPITAL**



**COMMUNITY  
SERVINGS**  
FOOD HEALS



**Salem**  
STATE UNIVERSITY



**SPAULDING™**  
REHABILITATION NETWORK



**St.  
Francis  
House**  
Rebuilding Lives.



**TRINITY CHURCH**  
IN THE CITY OF BOSTON



**CHARLES RIVER  
SCHOOL**



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**THE  
DIMOCK  
CENTER**

**BOSTON  
BALLET**  
MIKKO NISSINEN ARTISTIC DIRECTOR

**Bridge**  
OVER TROUBLED WATERS



