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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NATIONAL SNAPSHOT: THE PHILANTHROPIC LANDSCAPE
In 2019, giving reached $449.64 billion, a $21.93 billion increase since 2018.

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%

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%

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.

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: 45%
- Health: 37%
- Human Services: 7%
- Community & Economic Development: 5%
- Education: 2%
- Information & Communications: 1%
- Science: 3%

TOP CONTRIBUTIONS BY RECIPIENT

National Giving
As of June 29, 2020

- 6,431 Grants
- 500 Funders
- 5,045 Recipients

$2.7B

Source: Foundation Center
# National Fundraising During COVID-19: Donors Are Giving Generously

<table>
<thead>
<tr>
<th>Donor</th>
<th>Amount</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jack Dorsey</td>
<td>$1B</td>
<td>To fund COVID-19 relief around the world</td>
</tr>
<tr>
<td>Wells Fargo Foundation</td>
<td>$181M</td>
<td>To help address food, shelter, small business, housing stability, and to the CDC's Emergency Relief Fund</td>
</tr>
<tr>
<td>China Evergrande Group</td>
<td>$115M</td>
<td>To a consortium of Boston area clinicians and research institutions to develop diagnostic tools, treatments, and vaccines</td>
</tr>
<tr>
<td>Blue Meridian Partners</td>
<td>$100M</td>
<td>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</td>
</tr>
<tr>
<td>Netflix</td>
<td>$100M</td>
<td>To create an economic relief fund to help the filmmaking community who are out of work during COVID-19</td>
</tr>
<tr>
<td>Jeff Bezos</td>
<td>$100M</td>
<td>To support Feeding America’s efforts to provide food for those facing hardship during COVID-19</td>
</tr>
<tr>
<td>New York Community Trust</td>
<td>$75M+</td>
<td>To create the NYC COVID-19 Response &amp; Impact Fund to support nonprofits addressing essential healthcare and food insecurity, and arts and culture groups facing financial losses from COVID-19</td>
</tr>
<tr>
<td>Google</td>
<td>$50M</td>
<td>To support health and science, educational resources for children who are out of school, and small businesses</td>
</tr>
<tr>
<td>Otto Bremer Trust</td>
<td>$50M</td>
<td>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</td>
</tr>
</tbody>
</table>

Select Notable Gifts
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%

Source: Fidelity Charitable: COVID-19 and Philanthropy
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.

<table>
<thead>
<tr>
<th>Total charitable assets in DAFs:</th>
<th>Total annual contributions to DAFs:</th>
<th>Total annual grants from DAFs:</th>
</tr>
</thead>
<tbody>
<tr>
<td>$121.42B</td>
<td>$37.12B</td>
<td>$23.42B</td>
</tr>
</tbody>
</table>

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.

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

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

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
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

<table>
<thead>
<tr>
<th>Rank</th>
<th>County</th>
<th>Total Giving</th>
<th>Amount Per Itemizer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Middlesex</td>
<td>$1,788,931,000</td>
<td>$6,376</td>
</tr>
<tr>
<td>2</td>
<td>Suffolk</td>
<td>$1,000,791,000</td>
<td>$12,466</td>
</tr>
<tr>
<td>3</td>
<td>Norfolk</td>
<td>$908,247,000</td>
<td>$6,657</td>
</tr>
<tr>
<td>4</td>
<td>Essex</td>
<td>$408,211,000</td>
<td>$3,344</td>
</tr>
<tr>
<td>5</td>
<td>Worcester</td>
<td>$314,335,000</td>
<td>$2,633</td>
</tr>
</tbody>
</table>

Sources: The Chronicle of Philanthropy, Census Reporter
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

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

Source: MGH, Cape Cod Community College, Chronicle of Philanthropy, Dana Farber, Community Boating, UMass Boston, The Theatre Offensive, Big Charitable Gifts
<table>
<thead>
<tr>
<th>Funder</th>
<th>Details</th>
</tr>
</thead>
</table>
| **The Boston Foundation** | • $152,767,000 in Annual Giving  
  • Offer grants for arts and culture, education, neighborhoods and housing, jobs and economic development, and nonprofit effectiveness.  
  • 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. |
| **Barr Foundation**       | • $81,862,000 in Annual Giving  
  • They have grant applications available throughout the calendar year.  
  • 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.  
  • They are a private, Boston-based foundation with core programs in arts and creativity, climate, and education. |
| **GE Foundation**         | • $71,032,000 in Annual Giving  
  • Foundation branch of General Electric, a multi-sector energy, digital, and manufacturing company.  
  • Focus on education and skills, developing health, and have other philanthropic initiatives in disaster and humanitarian relief, ongoing corporate contributions, and volunteer initiatives. |
| **The Klarman Family Foundation** | • $60,160,000 in Total Annual Giving  
  • 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. |
| **Nellie Mae Education Foundation** | • $30,435,000 in Total Annual Giving  
  • Their focus is excellence and equitability in public education for youth.  
  • 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. |
| **The Liberty Mutual Foundation** | • $25,000,000 in Total Annual Giving  
  • 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." |

Sources: The Grantsmanship Center; The Boston Foundation; Barr Foundation; GE Foundation; The Klarman Family Foundation; Nellie Mae Education Foundation; The Liberty Mutual Foundation
# Top Massachusetts Foundations

## Massachusetts Foundations Outside the Boston Metro Area

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

Source: Foundation Center 2018-2020
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

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

Sources: The Chronicle of Philanthropy 2017; Census Reporter, Room 40 Group 2018
Metro Area Market Comparisons

Total Philanthropy Boston Metro Area: $4.58 Billion.

Boston is the 10th 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 Worth, San Jose, and Houston.

Comparable Philanthropic Markets to Boston by Metropolitan Area

<table>
<thead>
<tr>
<th>Metropolitan Area</th>
<th>Philanthropic Amount (in billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlanta</td>
<td>$5.72</td>
</tr>
<tr>
<td>Dallas-Fort Worth</td>
<td>$5.24</td>
</tr>
<tr>
<td>San Jose, Calif.</td>
<td>$5.06</td>
</tr>
<tr>
<td>Houston</td>
<td>$4.99</td>
</tr>
<tr>
<td>Boston</td>
<td>$4.58</td>
</tr>
<tr>
<td>Miami-Fort Lauderdale</td>
<td>$4.30</td>
</tr>
<tr>
<td>Philadelphia</td>
<td>$3.98</td>
</tr>
<tr>
<td>Seattle</td>
<td>$3.08</td>
</tr>
<tr>
<td>Minneapolis-St. Paul</td>
<td>$2.66</td>
</tr>
</tbody>
</table>

Sources: The Chronicle of Philanthropy 2017
**BOSTON NATIONAL COMPARISON**

**Giving Opportunity in Boston**
Additional gift potential if all income groups gave at the national average of percent of income at each income level

$1B

**Average Percentage Of Income Given**

<table>
<thead>
<tr>
<th>Top 50 Largest Metropolitan Areas</th>
<th>Boston</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3.2%</td>
</tr>
<tr>
<td></td>
<td>2.5%</td>
</tr>
</tbody>
</table>

**National Contributions by Source**

- **Individuals**: 70%
- **Foundations**: 16%
- **Bequests**: 9%
- **Corporations**: 5%

**Boston Contributions by Source**

- **Individuals**: 73%
- **Foundations**: 21%
- **Bequests**: 6%
- **Corporations**: 6%

**National vs. Local Comparison**

- **National Average Gift**: $2,514
- **Boston Metro Area Average Gift**: $5,885

Sources: The Chronicle of Philanthropy
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

<table>
<thead>
<tr>
<th></th>
<th>EXPENSES</th>
<th>REVENUE</th>
<th>CONTRIBUTIONS</th>
<th>ASSETS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$3.5 M</td>
<td>$3.0 M</td>
<td>$2.9 M</td>
<td>$6.0 M</td>
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<td></td>
<td>$3.8 M</td>
<td>$3.4 M</td>
<td></td>
<td>$5.5 M</td>
</tr>
<tr>
<td></td>
<td>$2.5 M</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Charity Navigator
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.

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

Source: Foundation Center 2018-2020
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)

**SELECT TOP CORPORATE FUNDERs IN BOSTON**

Sources: Room 40 Group
# Top Boston Corporate Foundations

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

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

Sources: The Boston Business Journal, 2019 Corporate Citizen Awards
Individual Giving accounts for $5.04 billion of the Boston Metro Area’s philanthropic market.

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

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

<table>
<thead>
<tr>
<th>Zip Code</th>
<th>City</th>
<th>Average Adjusted Gross Income</th>
<th>US Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>02110</td>
<td>Downtown Waterfront</td>
<td>$622,600</td>
<td>18</td>
</tr>
<tr>
<td>02108</td>
<td>Beacon Hill</td>
<td>$519,700</td>
<td>37</td>
</tr>
<tr>
<td>02116</td>
<td>Back Bay</td>
<td>$480,600</td>
<td>50</td>
</tr>
<tr>
<td>02199</td>
<td>Back Bay</td>
<td>$477,900</td>
<td>52</td>
</tr>
</tbody>
</table>

*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.

Sources: Bloomberg, The Chronicle of Philanthropy
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.

Sources: Wework FiveThirtyEight; Vertex; Life Science Cares; Science
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.

Source: Boston Business Journal
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 Musafer | 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
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.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Boston Foundation</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>BOSTON RESILIENCY FUND</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>United Way</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>CJP</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>

Source: [The Boston Foundation; Jewish Boston](#)
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
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.

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.
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.

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.
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.

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 grassroot 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.
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 “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.

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.

Sources: St. Frances House, Zoo New England, YMCA Greater Boston
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.

Source: CCS Fundraising, 2020
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

<table>
<thead>
<tr>
<th>Method</th>
<th>June 1 Results (%)</th>
<th>May 1 Results (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Calls</td>
<td>79%</td>
<td>70%</td>
</tr>
<tr>
<td>Social Media</td>
<td>58%</td>
<td>63%</td>
</tr>
<tr>
<td>Virtual Briefings</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Virtual Events</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>Webinars &amp; Podcasts</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Special Publications</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Written Reports</td>
<td>20%</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>

### Primary Sources of Current Support

<table>
<thead>
<tr>
<th>Source</th>
<th>June 1 Results (%)</th>
<th>May 1 Results (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Donors &amp; Stakeholders</td>
<td>69%</td>
<td>64%</td>
</tr>
<tr>
<td>Major Donors</td>
<td>48%</td>
<td>44%</td>
</tr>
<tr>
<td>Board Members</td>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>Foundations</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>New Donors</td>
<td>18%</td>
<td>21%</td>
</tr>
<tr>
<td>Corporate</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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.

Source: CCS Fundraising, 2020
This grid details how nonprofits can approach the five core elements of fundraising during the common phases of a major crisis.

<table>
<thead>
<tr>
<th>I. IMMEDIATE CRISIS</th>
<th>II. STABILIZATION</th>
<th>III. RE-EMERGENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Areas of Focus:</strong> Urgent actions and decisions; continued/modified operations; special and general appeals</td>
<td><strong>Areas of Focus:</strong> Program modifications; reassessed short- and long-term priorities; targeted stakeholder engagement</td>
<td><strong>Areas of Focus:</strong> Campaigns and fundraising plans; metrics and evaluation</td>
</tr>
</tbody>
</table>

**CASE FOR SUPPORT**
- Rationale behind your initiative (the “why”)
- Establish urgent funding requirements: operating and staff support, programs, and reserves
- Draft Case narrative with supporting data
- Circulate immediate Case narrative for internal review
- Measure new elements with close advocates
- Evaluate spendable operating funds, capital, technology, endowment, and reserves
- Draft interim funding plan
- Assess short-term funding impact
- Provide updated briefings on modified operations
- Reaffirm mission and vision
- Establish modified or new strategic priorities
- Set longer term funding requirements, in phases
- Draft Case for Support for the foreseeable future

**LEADERSHIP**
- Board, volunteers, executives
  - Create special emergency working group (administration, board, development staff, core advisors)
  - Form stakeholder outreach team(s)
  - Conduct CEO briefings
  - Consider board challenge gifts
  - Assess crisis impact
  - Evaluate working group roles
  - Set consistent meeting schedule
  - Continue briefings with key stakeholders
  - Assign concrete actions to board members
  - Reconstitute Development Committee
  - Reorganize fundraising leadership structure to support plan
  - Engage leaders and board in longer-term discussions
  - Review current staffing structure

**PROSPECTS**
- Your natural constituency
  - Segment by giving level
  - Research funders whose interests align with funding requirements
  - Determine the prospects most viable for immediate requests
  - Migrate donors to online giving
  - Re-assess/prioritize prospect pool based on aligned interests and capacity
  - Re-assess top prospects and establish individual plans for interim funding requests
  - Undertake full review of donor base and prospect pool
  - Perform full review of donor base and prospect pool
  - Repopulate wealth screening, modeling

**PLAN**
- Strategy and tactics for campaigning
  - Implement special appeals to select donors/all audiences
  - Design specific fundraising strategy and outreach for each donor segment
  - Engage in high-level peer requests
  - Set immediate fundraising targets
  - Request accelerated and increased annual support
  - Redesign fundraising strategy for each donor segment
  - Survey donors
  - Establish short-term fundraising targets
  - Offer short-term gift payment options
  - Determine modified program viability
  - Conduct surveys/focus groups
  - Consider planning study or campaign
  - Reassess donor base/priorities
  - Establish longer-term fundraising targets
  - Set multi-year funding priorities
  - Assess impact evaluation tools

**COMMUNICATION**
- Outreach to all constituents
  - Begin outreach to close stakeholders and top donors
  - Intensify communication to all constituents across channels
  - Maintain consistent email updates to groups of stakeholders
  - Accelerate annual gift requests
  - Publish regular and consistent impact reports
  - Articulate successes and plan for continued growth
  - Revise organizational communication plan
  - Circulate and enforce talking points and branding
  - Redeploy marketing budget to ramp up outreach

Source: CCS Fundraising, 2020
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.

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.

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

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.

Source: CCS Fundraising, 2020
LOCAL AND REGIONAL RESOURCES FOR NONPROFITS

Click logos below to explore resources

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

Massachusetts specific resources for nonprofits.

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.

Highlights state by state resources for nonprofits during this time.

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

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

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