In 2020, the COVID-19 pandemic and the racial and social unrest in our communities and across our country drastically changed our approach. Focusing on our values and role in strengthening our community, Philanthropy Massachusetts made space for listening and bringing individuals together. Sharing experiences on a professional and personal level, providing leadership as we advance strategies for the pandemic and racial injustices in our country.

**Major historic events bring us together as a community** and give us collective experiences. We live these experiences, and they guide us to be responsive and innovative. Striving to do better each day to make an impact in the continued work of philanthropy.

In gratitude, Philanthropy MA Staff

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**Reflecting, Reimagining & Rebuilding**

- Our office closed on March 13, 2020 and Philanthropy MA staff pivoted to offer virtual programs for our Members and Nonprofit Partners.

- Our first Zoom call on March 19th had over 225 participants. It was evident our Members needed to be together, to share information and learn from one another about what was needed in real-time.

- In a typical year, Philanthropy MA hosts about 80 programs for funders and nonprofits; by end of 2020, we hosted over 120 programs.

In June 2020, as civil unrest around racial injustice dominated our communities, Philanthropy MA again assisted the sector in finding pathways forward. In addition to our programming already lifting up racial equity, diversity and inclusion, we were asked by colleagues throughout the sector to help center this important work in their own ongoing efforts.

By the end of 2020, every network based at Philanthropy MA had centered sessions on race, equity, diversity and inclusion. We will continue to make it central to 2021 and beyond.
The COVID-19 pandemic and the racial and social unrest in our country were at the forefront of Philanthropy MA's programming in 2020. Last June, we issued a Call to Action to philanthropy in Massachusetts, and we lifted up important voices in our sector such as Asian Americans/Pacific Islands in Philanthropy, Nellie Mae Education Foundation and others. In our role as convener, Philanthropy MA brought together Funders, Nonprofit Partners, and Funder Networks in a safe space to learn, share experiences, identify new strategies, and take action.

**FUNDER FOCUS**

**Power & Equity Series**

- “We Must be in It for the Long Haul”: Black Foundation Executives Request Action by Philanthropy on Anti-Black Racism
- Adopting & Practicing a Trust-Based Approach with the Trust-Based Philanthropy Project
- Participation, Power, Philanthropy: Putting Nonprofits and Communities in the Driver’s Seat with Grantmakers for Effective Organizations

“I want to add my voice to those who are appreciating the job you are all doing with the power and equity series and pulling together the kind of conversations like the one with the Western MA Funders Group.”

**JOSIE GREENE**
Josephine and Louise Crane Family Foundation
Funder Member and Nonprofit Partner Programming

Five joint programs, the most in any year, were offered to funders and nonprofits to come together around COVID-19 and Diversity, Equity, and Inclusion (DEI) focus areas. These programs are strong examples of deepening partnerships with other leaders in the field.

- **Equitable Evaluation** (February) with Prentice Zinn, GMA Foundations and Rebecca Jackson, Trinity Boston Connects
- **Weathering the Storm: Board and Executive Leadership Collaboration in Crisis** (April) with Interim Executive Solutions
- **Building an Inclusive Investment Portfolio** (May) with Zevin Asset Management
- **Strengthening Grantees/Relationships Matter** (July) with the Center for Effective Philanthropy
- **Scenarios for the Future of Philanthropy in the Midst of COVID-19** (December) with Monitor Institute by Deloitte

Funder Networks

With the addition of two new Networks, Program Staff Learning Network and Behavioral Health Funders Network, Philanthropy MA convened twelve Funder Networks throughout the year around interests, roles, and geography. Each Network includes Philanthropy MA members and individuals from the broader philanthropic sector across the state who come together to exchange ideas and resources within a supportive, peer environment.

A key focus 2020 was demonstrating commitment to address Racial Equity, Diversity, and Inclusion (REDI) internally and through grantmaking. The following Funder Networks continued REDI learning and made this a clear goal:

- Behavioral Health Funders’ Network
- CFO/Finance Director Network
- MA Arts Funders’ Network
- Western MA Funders’ Network

“I continue to be blown away by the diverse multitude of panels, group convenings, information sessions and other programming that Philanthropy MA has done and in particular during these past 8 months of COVID and racial equity challenges.”

*TREF BORDEN*

*The Fish Family Foundation*
**Nonprofit Partners Program**

- At the onset of the pandemic, scheduled [Nonprofit Partners](#) programs went virtual, and we ramped up with additional programs related to COVID-19 to adapt to meet the current needs of the sector.
- Prior to March 2020, Nonprofit Partners programs averaged about 30 participants per in-person session. Virtual programming increased participation to almost 100 people per session and enabled us to better reach nonprofits across the state.
- Joint programs for Funders and Nonprofit Partners experienced an increased interest by the funder community to come together with nonprofits to discuss the issues around equity and COVID-19.
- Online access to all Nonprofits Partners, regardless of member status, was provided to Philanthropy MA Grant Makers’ Directory, along with online database tutorials to assist with grant seeking.

**Collaboration with Massachusetts Nonprofit Network**

Together with the Massachusetts Nonprofit Network (MNN), Philanthropy MA designed and deployed three statewide surveys to understand the impact and needs of the Massachusetts nonprofit sector. The responses from thousands of Massachusetts-based nonprofits enabled us to provide funders with the immediate and long-term needs of the nonprofit sector.

The partnership also expanded to include joint programming with MNN, which allowed us to share topics and resources with our Partners outside of the fund development content area.

**Philanthropy MA’s Funder Behavior and Outlook Survey 2020**

In September 2020 Philanthropy MA conducted a survey to learn of the changes, or anticipated changes, to funder practice due to the COVID-19 pandemic and the social and racial unrest in our country. The captured data indicated funder behavior since these crises began and asked questions regarding funder outlook for the coming year. Understanding the impact of both crises on our funder and nonprofit communities will allow us to be more aware and receptive to immediate needs facing our communities.

**Disaster and Emergency Relief Resources Webpage**

We compiled over one hundred critical resources around emergency funding for COVID-19 and other ways to navigate operating during a statewide shutdown.

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“As a longtime Member of Philanthropy MA, Wells Fargo gets so much value out of the relationship - peer networking, workshops, and research - that we wanted to leverage the Nonprofit Partners Program for our grantees and provide them access to this innovative and critical programming. The program ensures nonprofit organizations obtain the knowledge and resources to successfully maintain and grow their operations, programming and resource development, particularly in challenging times.”

-BRIANA CURRAN
Wells Fargo
Programs and Services
In March 2020 as a response to the global pandemic, Philanthropy MA moved all programming to virtual meetings. Early on, we held three state-wide convenings in March, April and June with an audience of over 200 funders at each session as our sector addressed challenges and strategies in response to these unprecedented times. Further, we scaled up programming to address the rapidly-changing needs of our constituents:

- We hosted or co-presented nearly 50 programs in 15 weeks from March to June. In a typical year we host 80 programs; in 2020 we hosted 120 programs – that’s an average of one session every 3 days!
- Over 1400 Funders and 1200 Nonprofit Partners registered for events throughout the year.
- We broadened our audience with participation by over 200 non-Members as a result of providing critical, responsive programs and making these accessible virtually.

Meet-the-Donors
The positive effect of shifting to a virtual platform to bring Funders and Nonprofits together allowed for:

- Six Meet-the-Donors events covering topics in Health, General Operating, Human Services and Pandemic Response and the Berkshire County and North of Boston regions.
- Easy accessibility for attendance from all across the state, totaling over 800 nonprofit professionals. A 50% increase in attendance from 2019.

“The Donor Pipeline and Communications during COVID workshop was of tremendous value to our little team. I really enjoyed how well the Zoom was moderated, and admired the use of additional Philanthropy MA staff to ensure smooth transitions to and from break out rooms, and to facilitate the comments section.”

- PHIL TAYLOR
  Moonbox Productions, Inc.

We scaled up programming to address the rapidly-changing needs of our constituents.
Summer Fund
In 2020 Summer Fund raised nearly $1.25 million, above its budgeted goal of $1.1 million, thanks to generous supporters. The Fund implemented a phased approach to its grantmaking, informed by data and narratives from nonprofit partners as well as from leaders in the summer camp/program space.

The phased approach to grantmaking in 2020 resulted in 4 rounds of funding, each of which was designed to respond to the most pressing needs of our partners.

• **Emergency General Operations**: support of $296,500 provided to 50 organizations in mid-April. This was one of the earliest times the Summer Fund was able to provide grant resources to its nonprofit partners due to the COVID-19 pandemic.

• **General Operations**: grants totaling $247,000 awarded in July, based on up-to-the minute data collected in spring, to fund Virtual Programs (17), Mixed Programs (18), and In-person programs (7).

• **Homeless Campership Funds**: $102,900 awarded to serve youth experiencing homelessness and housing-insecurity (inclusive of digital connectivity support), and $75,475 to meet additional financial requests of camps serving at capacity.

• **Camp Resiliency Fund**: $131,000 provided to: 1) aid camps in planning for reopening in 2021 and 2) support partner organizations carrying out advocacy at the State level on behalf of summer enrichment programs.

Anonymous (4)
The Paul and Edith Babson Foundation
Bank of America Charitable Foundation
The Boston Foundation
The Cabot Family Charitable Trust
Cambridge Community Foundation
Liberty Mutual Foundation
Linde Family Foundation
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The William E. and Bertha E. Schrafft Charitable Trust
Anna B. Stearns Charitable Foundation
Inez Washabaugh Ward, PNP, Scholarship Fund
Yawkey Foundation
Individual donors (2)
LEADERSHIP

GIVING MASSACHUSETTS 2020 Report

In June 2020, Philanthropy Massachusetts released Giving Massachusetts 2020, the first report on institutional philanthropy in Massachusetts in over 15 years, to an audience of over 185 foundation leaders. Giving Massachusetts 2020 provides a baseline for foundation giving; looking at data and trends in giving BY Massachusetts, TO Massachusetts, and within each county.

KEY FINDING

Make up of grant dollars distributed:

- **81%** Giving by private, independent or family foundations.
- **10%** of funding was distributed by corporate foundations.
- **8%** by community foundations.
- **1%** by operating foundations.

Grace Chiang Nicolette @GraceNicolette

Jun 17 This data tells us where we’ve been, and we need to ask where we should be. @philxbuchanan of @CEP-Data #givingma, #philanthropy
Reflecting, Reimagining & Rebuilding
PHILANTHROPY MASSACHUSETTS

LEADERSHIP (continued)

Fiscal Health
Philly continues to maintain a strong financial position. We ended 2019 with over $1m in operating net assets, which represents 11 months of operating expenses, and we projected adding another $150k in operating net assets at the end of 2020. In 2019, in celebration of our new name and our 50th anniversary, we embarked on a modest multi-year campaign to raise $500k in new grants and memberships. By March of 2020, we had received over $470k in grants & pledges - and then, well, you know what happened, and we paused our campaign. Nonetheless, through the generosity of members providing some unsolicited grants and an unprecedented number of new members joining as response to our work around COVID19, we met our goal and further positioned ourselves for success in 2021 and beyond. View audited financial statement.

"The Sudbury Foundation trustees approved a general operating support grant to Phill in recognition of its outstanding support to the philanthropic community throughout the COVID-19 crisis. We are fortunate to have such an active, engaged association in Massachusetts. Thanks to Phill for your hard work during these challenging months."

• MARILYN MARTINO, EXECUTIVE DIRECTOR, The Sudbury Foundation

THANK YOU to Our Generous Supporters

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(Donations received in 2019 and 2020.)
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