



Thriving People. Vibrant Places.

A Five-Year
Progress Report
from the
Boston Foundation

About the Boston Foundation

The Boston Foundation, Greater Boston's community foundation, is one of the largest community foundations in the nation, with net assets of some \$1 billion. In 2015, the Foundation and its donors made more than \$110 million in grants to nonprofit organizations and received gifts of nearly \$122 million. In celebration of its Centennial in 2015, the Boston Foundation has launched the Campaign for Boston to strengthen the Permanent Fund for Boston, the only endowment fund focused on the most pressing needs of Greater Boston. The Foundation is proud to be a partner in philanthropy, with more than 1,000 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Boston Foundation also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), an operating unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations around the globe.

The Mission of the Boston Foundation

As Greater Boston's community foundation since 1915, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone. It fulfills this mission in three principal ways:

- 1:** Making grants to nonprofit organizations and designing special funding initiatives to address this community's critical challenges;
- 2:** Working in partnership with donors to achieve high-impact philanthropy; and
- 3:** Serving as a civic hub and center of information, where ideas are shared, levers for change are identified, and common agendas for the future are developed.

Values Statement

In everything we do, we seek to broaden participation, foster collaboration and heal racial, ethnic and community divisions.

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February 2016

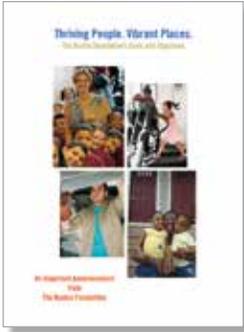
About This Report

This five-year progress report is the result of an in-depth, year-long review process led by Stephen Chan, Chief of Staff, in close consultation with Naomi Parker and Sage Ruth. Other major contributors included Jennifer Aronson, Interim Vice President for Program; Kate Guedj, Vice President and Chief Philanthropy Officer; Mary Jo Meisner, Vice President for Communications, Community Relations and Public Affairs; Corey Davis, Director, Grants Management; Allison Bauer, Senior Director, Health and Wellness; Damon Cox, Director, Jobs and Economic Development; Allyson Esposito, Director, Arts and Culture; Rebecca Koepnick, Director, Neighborhoods and Housing; and Elizabeth Pauley, Senior Director, Education to Career. The report was written by Barbara Hindley, Senior Director of Publications and Marketing, and edited by Mary Jo Meisner.

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Preface



In the fall of 2009, the Boston Foundation announced a new strategic plan and framework, *Thriving People, Vibrant Places*, which sought to align much of our work to a series of strategic goals. We decided that we would use all of the resources we had on hand to try to meet these goals. These included grant making through our endowment, the Permanent Fund for Boston, but also the considerable civic leadership and policy-level work we have been engaging in since in 2001, when I was appointed President and CEO with a mandate to broaden the Foundation's role in the community. We also wanted to deepen our partnership with our donors to increase our impact in areas of shared interest.

By definition, every community foundation's mission is to serve the broad needs of the city or region it represents, rather than focus on one sector or issue area. Grants from the Boston Foundation over the last century have gone to strengthening education, supporting innovation in housing, community development and health, working to extend economic opportunity to all members of our city and nourishing the arts.

The *Thriving People, Vibrant Places* framework embraced all of these sectors of community life and detailed specific strategic goals for each of them. In these pages, we look back at the experiences we have had over the last five years and reflect on the areas where we made collective progress and areas where challenges remain.

Social change on the scale that was laid out through this framework is a massive undertaking. While there was extraordinary progress in meeting some goals, other goals remained more elusive. We learned that we had to be flexible and open to refining the strategies and goals we had set for ourselves and to allowing the approaches we were taking to evolve.

We also remained open to opportunities and needs that emerged in areas that did not fall neatly into our strategic framework, especially in response to extreme situations, such as the foreclosure crisis that led to the Great Recession and high rates of unemployment that had affected so many Bostonians.

Last year, we celebrated the Boston Foundation's 100th Anniversary. While much of our focus during 2015 was on the Foundation's impact over the last century, we are eager to use the lessons we have learned over the last five years to guide our course going forward as we strive to continue to strengthen Greater Boston—and the Boston Foundation—for the next 100 years.

Paul S. Grogan, President and CEO

By the Numbers

2009 – 2014



All Grants Made
From All Types of Funds

**\$450
Million**



Discretionary Grants Made
*From the Permanent
Fund for Boston*

**\$81
Million**



Program Related Investments
Including Loan Guarantees

\$13.5 Million

**Funds Leveraged from Donors and Other
Funders** *For Boston Foundation Initiatives*

\$21 Million



Food and Fuel Fund Grants
For Basic Human Needs and Emergencies

\$3 Million



**Grants to
Grassroots
Projects**
*Through the
Action Fund*

\$1.5 Million

**Government Dollars Leveraged
and Saved** *Through Civic Leadership
Public Policy Work*

**\$552.4
Million**



**Number of People Who Attended
Boston Foundation Forums**

54 Understanding Boston forums and 45 reports

10,800



Introduction

A Strategic Approach to Greater Impact

In the fall of 2009, the Boston Foundation announced a new strategic framework to guide much of its work for the next five years. The framework had its roots in a larger strategic direction first taken by the Foundation's Board of Directors in 2001. At that time, the Board believed the Boston Foundation could expand its impact beyond its traditional role—as a broad, responsive funder of nonprofits—by serving as a civic leader and proactively addressing our region's greatest challenges.

Paul S. Grogan was appointed President and CEO that same year with a directive to do just that. Within a short period of time, the Boston Foundation developed a robust public affairs capacity that uses commissioned research, convenings, media relations and the formation of task forces and coalitions in combination with grant making to influence public conversation and policy change across a broad array of areas—from housing to education reform to health and the arts.

The new framework released in 2009 was informed by the unsettling economic and social context of the time. Boston and the country were being buffeted by the most serious recession since the Great Depression. With the collapse of the housing market, an unprecedented foreclosure crisis, a wave of layoffs and high unemployment rates, those community members who had always been the primary focus of the Boston Foundation—poor and low-income residents—were suffering the most.

In 2009, the Boston Indicators Project, an initiative of the Boston Foundation, published a report titled *A Great Reckoning: Healing a Growing Divide*, focused on the fact that we were living in an increasingly polarized city, one in which the rich were getting richer and the poor were barely making any progress at all.

Informed by this backdrop—and after a year-long planning process with board and staff

involvement—in September of 2009, the Boston Foundation announced *Thriving People, Vibrant Places*, a five-year strategic framework that had ambitious goals and reflected major changes in the Foundation's approach to its grant making from the discretionary funds of the Foundation's endowment, the Permanent Fund for Boston.

The goals were conveyed to the community, including the Foundation's constituents in the nonprofit community and donors, especially those who focus some of their philanthropy on Greater Boston.

Three Major Elements

The new framework had three major elements:

1: A focus on a short list of goals and strategies where the Boston Foundation believed it could have a major impact by using all of its roles in the community—grant making, civic leadership and partnering with donors.

Thriving People, Vibrant Places did not represent a major shift in the Foundation's priorities; rather it was a sharpening of its approach to issues that it had been working on for many years. The new framework called for fully deploying all of the roles it plays—grant maker, partner with donors and civic leader—to make targeted contributions toward achieving specific goals and strategies in the following five "Impact Areas."

The Five Impact Areas

- 1 EDUCATION**, focused on K-12 structural reform and college completion for Boston Public Schools students
- 2 HEALTH & WELLNESS**, with a long-term goal of reducing obesity and a short-term goal focused on increasing youth physical activity
- 3 JOBS & ECONOMIC DEVELOPMENT**, focusing on workforce development as well as inner-city jobs and entrepreneurship

The Five Impact Areas



EDUCATION



HEALTH



JOBS & ECONOMIC DEVELOPMENT



NEIGHBORHOODS & HOUSING



ARTS & CULTURE

- 4 **NEIGHBORHOODS & HOUSING**, including the production and preservation of affordable housing as well as violence prevention
- 5 **ARTS & CULTURE**, with a broad goal of strengthening and celebrating Boston through strong arts organizations and the elevation of culture

2: Major changes to the Foundation's discretionary grant-making process, including the removal of application deadlines, an emphasis on large, multi-year grants and a shift from project support to general operating support.

An announcement was made to the Greater Boston nonprofit community that explained the new framework, signaling a sea change in the Foundation's approach to its discretionary grant making, which is made possible by the flexible pool of funds in the Foundation's endowment, the Permanent Fund for Boston, and distributed at the "discretion" of the Foundation's board and staff.

Under the new framework, the Foundation sought to work with grantees as partners aligned around common goals. Workshops were held at the Boston Foundation with nonprofit organizations to explain the changes, many of which had been influenced by feedback the Foundation had received from the nonprofits themselves. For years, grantees had told the Foundation that operating support is the most useful kind of funding and that consistency of funding over time is paramount. The first round of grants made through the new framework were in December of 2009.

The Foundation's new approach to grant making included:

- **A Shift to Unrestricted Support.** Grants would be made to organizations with missions closely aligned with the Foundation's new framework. These nonprofits would be able to use the funding as they saw fit to pursue their goals.
- **Larger, Multi-Year Investments.** Many of the operating support grants would be multi-year commitments—with annual grant sizes as high as \$150,000.

- **No Term Limits.** In the past, many of the Foundation's grantees were asked to "take a break" from support by the Foundation. Going forward, grants would be awarded for up to five years without limiting nonprofits to term limits.
- **A Flexible Process.** Nonprofits could apply for grants on their own timetable, rather than through meeting a series of deadlines imposed by the Foundation.

3: A continuing commitment to remain flexible to broad community interests and responsive to emerging interests.

The Foundation made it clear that in addition to its focus on the five impact areas, it would continue its historically broad interests and remain opportunistic in supporting innovation and persistent or emerging community challenges. While the new framework would focus the majority of the Foundation's resources on specific areas of community life, a limited amount of funding was preserved to be responsive to new ideas presented to the Foundation by nonprofits, including:

- **Special Opportunity Grants** for approaches and organizations that tackle long-standing or emerging community challenges that may or may not be directly aligned with the Foundation's strategic framework;
- **Vision Fund Grants** for pilot projects or activities that build the operational capacity of the organization;
- **Action Fund Grants** for grassroots, community-based ideas that needed support in order to develop and implement their ideas more fully;
- **Out of the Blue Grants** to organizations that do exceptional work and have strong leadership;
- **Sponsorships** of special events mounted by nonprofit organizations.

Key Lessons and Observations

Over the course of the past five years, the Boston Foundation has made real progress in some of the five impact areas of the framework—helping to shape public discourse and even playing a key role in fundamentally transforming systems in a relatively short period of time. In other cases, the strategies and even the goals have evolved over time, either due to changing conditions or staff turnover, leading to a period of transition and recalibration. In one case, it was determined that the original goals were too ambitious and so “short-term” and “long-term” goals were developed.

- As the framework evolved, it became clear that five years was an extremely limited period of time in which to achieve the broad, ambitious goals of the *Thriving People, Vibrant Places* framework. Real, deep social change takes time and the issues the new framework focused on had taken decades to develop and could not be “solved” in a few years of work. However, progress—in some cases, remarkable progress—in achieving a number of specific goals was made in some impact areas.
- The Foundation also learned that it is vital for a community foundation to remain nimble and flexible, so that it can respond to the times. For instance, the Foundation, in partnership with its donors and other foundations, created a special Food and Fuel Fund to help those suffering the most from the grip of the Great Recession, especially during the winter months. And, when a devastating hurricane hit Haiti in 2010, the Foundation worked closely with two of its most active donors to build a special five-year fund, grounded in Boston’s local Haitian community and dedicated to helping Haiti’s people recover and rebuild.
- There were also marked differences in the ways that progress could be tracked and measured among the five impact areas. Some goals, such as those in education, can be measured through data—including MCAS scores, dropout rates and graduation rates—but progress in other areas, such as arts and culture, is harder to measure. As a result, this report presents some data that shows real, tangible change in certain areas, but not in all of them. For those that are not easily measured, progress is described in qualitative, rather than quantitative terms.
- From the beginning, it was determined that the Foundation would employ all of the roles it plays in the community to advance and support the *Thriving People, Vibrant Places* framework. As a result, this report includes the impact of the Foundation’s grant making, its work in the area of civic leadership and its close partnerships with donors.
- Partnership and collaboration with leaders in the private and public sectors, and grassroots organizations, also were crucial to making progress toward the sweeping goals established by the framework. Joining together with other large charities, private foundations, Boston Foundation donors and nonprofit organizations proved to be crucial to achieving real, positive change.

About This Report

This report begins by describing the three primary roles the Foundation plays in the community—grant maker, civic leader and partner with donors—then focuses on each of the five impact areas and describes the ways in which the Foundation succeeded in meeting its goals and where it fell short.

Finally, there is a conclusion that summarizes some of the lessons learned since 2009 and how this new knowledge will inform the Boston Foundation’s future work as it continues to play its fundamental role as a seeker of positive social change.



Record Sheet 1-A

Name: HOOPER

Date: _____

My Favorite Thing: _____

I drew a _____

I think it needs _____

Record Sheet 1-A

Name: ALICE

Date: _____

My Favorite Thing: _____

I drew a _____

I think it needs _____

Applying All of the Foundation's Roles

Making Grants and Other Investments in Greater Boston's Nonprofits

As noted in the Introduction, discretionary grant making refers to grants made through the pool of flexible funds in the Foundation's endowment, the Permanent Fund for Boston. It represents some 18% of the Foundation's overall giving. In addition to discretionary grant making, the Boston Foundation also makes Program Related Investments (PRIs), which are investments in nonprofit ventures that involve the potential return of capital within an established timeframe.

For many years, the Boston Foundation's discretionary grant making focused on single-project grants in response to proposals from nonprofits. This approach required all nonprofits to reapply annually on a strict schedule of deadlines. It also limited the use of funds to specific

purposes rather than providing the general operating support many nonprofits say they need in order to conduct their work in the community and plan for the future.

Through the new *Thriving People, Vibrant Places* framework, the Foundation decided to reshape its discretionary grant making and its relationships with grantees to emphasize deep and long-lasting partnerships with nonprofits that are closely aligned with the Foundation's goals and strategies. Its discretionary grant making shifted to emphasize larger, multi-year general operating support.

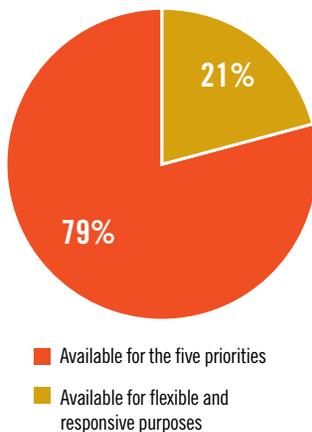
While the shift in funding was well received by many of the Foundation's grantees, because operating support and larger grants allowed for greater flexibility and increased their capacity to plan for the future, the new approach also stretched the discretionary pool of funds from which all of these grants are made.

These larger grants had the understandable effect of reducing the overall number of organizations that could be supported each year. In addition, multi-year grants tied up funds available for new discretionary grant making, limiting the Foundation's flexibility to explore new opportunities.

Between 2009 and 2014, close to 79% of the Foundation's discretionary funding went to nonprofits closely aligned with the *Thriving People, Vibrant Places* framework, while 21% was available through more "flexible" programs for organizations with more diverse missions.

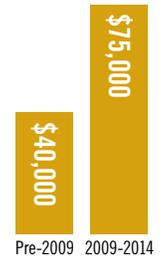
The result is that it was challenging for new nonprofits or those whose work does not fit into the framework to receive a grant from the Boston Foundation.

Breakdown of Grants to the Five Impact Areas and Cross-Cutting Strategies vs. Flexible and Responsive Grants 2009-2014



Discretionary Grant Making Before 2009 and from 2009 – 2014

Median grant size



Percentage of funding going to general operating support grants



Percentage of funding going to multi-year grants



Civic Leadership in Impact Areas

Groundbreaking Education Reform

through Race to the Top Coalition, leveraging

\$250 Million
in federal funds

Community College reform

through the Coalition FOR Community Colleges, leveraging

\$20 Million
in state funds

Smart Growth Housing

continues to expand, thanks to the Commonwealth Housing Task Force, totaling

12,350
new units in 32 districts

Passage of Municipal Health Care Reform

saves

\$200 Million
for 125 cities and towns; and the Healthy People/Healthy Economy Initiative raises awareness about the crisis in chronic disease

Massachusetts Cultural Facilities Fund

grows to total **\$82 Million** in investments in 118 cities and towns



Increasing Impact Through Civic Leadership

The *Thriving People, Vibrant Places* framework also helped inform the Boston Foundation's civic leadership work over the last five years, including:

- Commissioning and publishing cutting-edge research and using data gathered by the Boston Indicators Project;
- Acting as a convener through *Understanding Boston* forums;
- Leveraging media and communications strategies to highlight the Foundation's work;
- Developing public policy and legislation and lobbying for its passage; and
- Creating and convening task forces and broad-based coalitions to encourage policy change.

From the fall of 2009 through 2014, the Boston Foundation published 44 reports and held 54 forums on a broad range of topics, convened task forces and coalitions—and actively helped to make new policy affecting the entire state. The contributions of this work are threaded throughout this report in the sections on the five impact areas. A number of the reports published by the Foundation were supported by the Permanent Fund for Boston, the Foundation's endowment, with other work supported by an annual Civic Leadership Fund drive that has raised

millions of dollars of support for this work.

The Foundation's civic leadership has had an impact on—and informed—all of its work, but has made especially powerful contributions to K-12 education reform legislation through convening the Race to the Top Coalition, which led to the Achievement Gap Act, signed by former Governor Deval Patrick in 2010, and to \$250 million in federal funding for education in Massachusetts. The Foundation also convened the Coalition FOR Community Colleges, which played a central role in passing reforms to the state's community college system, and played a leadership role in creating the Massachusetts Cultural Facilities Fund, which has pumped millions of dollars into the state's crumbling cultural infrastructure.

Convening Civic Leaders

In addition to the above work, the Boston Foundation also has convened leaders throughout Greater Boston and Massachusetts through programs such as City to City, which brings leaders from Boston to other cities around the world to learn innovation approaches to civic life, the John LaWare Leadership Forum and the Commonwealth Summit, which brings together the state's leaders in business, labor, government, the nonprofit sector and academia for an off-the-record weekend to discuss challenges and opportunities facing Massachusetts and work on a shared agenda.

The Boston Indicators Project

The goals established by the *Thriving People, Vibrant Neighborhoods* framework were informed by the Boston Indicators Project, which has been a primary data resource for the Boston Foundation and for Greater Boston for 15 years. The Project plays a central role in informing ongoing conversations about issues, challenges and opportunities facing Greater Boston and the region.

In addition to tracking a comprehensive framework of key indicators, the Project produces biennial reports chronicling Boston's accomplishments on a number of measures as well as the full array of challenges facing the city and region. It also convenes experts and stakeholders, analyzes relevant data and reviews current research to produce special reports on such critical topics as poverty and education.

Through its website, bostonindicators.org, the Project offers new ways to understand Boston and its neighborhoods in a regional, national and global context. The site tracks progress on shared civic goals and reports on changes in 10 sectors: civic vitality, cultural life and the arts, the economy, education, the environment, health, housing, public safety, technology and transportation.

Sponsored and coordinated by the Boston Foundation, the Indicators Project has helped to shape and track all of the work of the Foundation and its many partners. Every two years, the Project produces a comprehensive report that places our city and region in the context of national and global forces. In addition, the Project published the first report card on Boston's education pipeline and the first report on poverty in Boston. It also served as the data source for the Healthy People/Healthy Economy Initiative and other special initiatives, such as the Boston Opportunity Agenda.

In 2009, the Project's biennial report identified the growing inequality in Boston and the country—long before it was the central issue it is today.

Recently, the Project released its latest report, *Shape of the City: Making Boston America's Upwardly Mobile City*, and developed a new "Opportunity Index"—an online dashboard that tracks six key indicators central to the healthy development of Boston's children.



Partnering with Donors and Other Funders Committed to Boston

One of the most important partnerships the Boston Foundation has in the community is its close relationship with the hundreds of donors who contribute to its endowment, the Permanent Fund for Boston, or conduct their philanthropy through Donor Advised Funds at the Foundation. Donor Advised Funds were first introduced in the 1980s and have become a popular and fulfilling way for philanthropists to engage in small-scale and large-scale giving.

When *Thriving People, Vibrant Places* was announced in 2009, the Foundation reached out to its many donors to introduce the new framework to them. By keeping donors informed about the issues confronting Boston, increasingly donors

Through their Donor Advised Fund, Karen and Jim Ansara make grants internationally, but also to some of the Boston nonprofits the Foundation supports through its Permanent Fund for Boston.

with Donor Advised Funds have been supporting many of the same organizations funded through the Foundation's Permanent Fund for Boston.

Between 2009 and 2014, the Boston Foundation and its donors made grants totaling some \$450 million. The largest portion of this spending, \$369 million, was directed by the Boston Foundation's donors through Donor Advised and Designated Funds (funds that support specific organizations annually), while \$81 million was awarded at the discretion of the Boston Foundation's staff and board through the Permanent Fund for Boston.

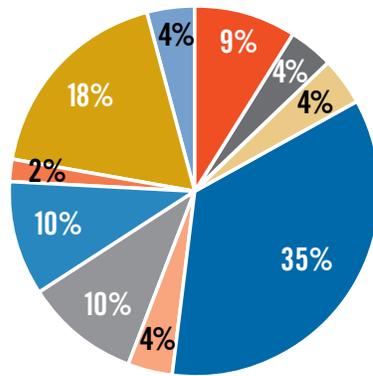
In the 2014 Fiscal Year, Boston Foundation donors gave away \$90.5 million, significantly more than any previous year. Grants from Donor Advised Funds support a wide range of issues and organizations, with the largest percentage going to Education (35%).

Of these dollars, close to two-thirds of the grants were made to organizations in Massachusetts, the majority to those in Greater Boston.

In 2014, for instance, some \$11 million in grants from Donor Advised Funds (12%) also directly supported the same nonprofits that received grants from the Foundation's discretionary funds—significantly expanding the Foundation's support of Greater Boston nonprofit organizations.

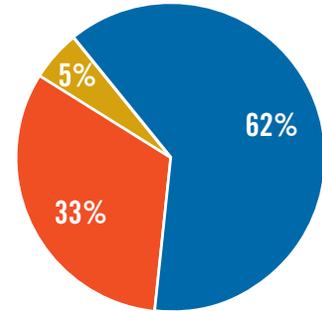
In addition, donors have made deep commitments to several special initiatives of the Boston Foundation. From 2009 through 2014, donors gave \$3,323,770 to an initiative the Foundation launched to reduce gun violence in Boston's neighborhoods, called StreetSafe Boston. In that same time period, \$917,750 from donors supported Success Boston, the primary initiative through which the Foundation seeks to have an impact on college completion rates for graduates of the Boston Public Schools.

Donor Advised Fund Grants by Sector 2014



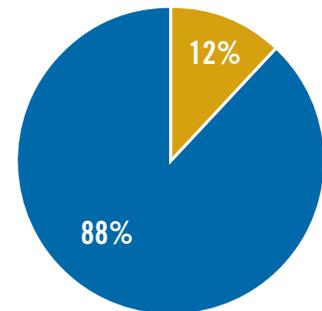
- Arts, Culture & Humanities \$8.1M
- Civic Affairs \$3.4M
- Community Development \$3.1M
- Education \$32.1M
- Environment \$3.9M
- Health \$9.1M
- Other \$9.3M
- Religious Organization \$1.8M
- Social Services \$16.4M
- TBF \$3.3M

Donor Advised Grants by Geography 2014



- Greater Boston
- Out of State
- Massachusetts Outside of Boston

Donor Advised Grants Aligned with Those Made Through the Permanent Fund for Boston 2014



- % of Aligned Grants
- % of Total Grants

Progress on Goals and Strategies by Impact Area

The Boston Foundation's new focus on five impact areas was informed by work the Foundation had been doing since 2001, lessons learned from that work, conversations with stakeholders and statistics and information about the city and region provided by the Boston Indicators Project.

The following sections explore the work done over the last five years in each of the *Thriving People, Vibrant Neighborhoods* framework's impact areas, including the Foundation's goals, progress made and remaining shortfalls and challenges.

Where numbers and data are available they are included. Some sectors, such as education and housing, are far more easily tracked through data than others and that inconsistency is reflected throughout this report. Information about the total grant-making dollars devoted to each impact area is included—along with progress made through the Foundation's civic leadership and policy work.



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NEIGHBORHOODS & HOUSING | 34



ARTS & CULTURE | 42



The Boston Foundation convened the Race to the Top Coalition, which attracted \$250 million in Race to the Top federal funding for Massachusetts, raised the charter cap and brought important reforms to district schools.

EDUCATION: K-12 Structural Reform

K-12 Structural Reform at a Glance



Goal: Double the number of seats in autonomous Boston schools, including charter schools outside of the school district, as well as schools with autonomies inside the district, from 18,000 in 2009 to 36,000 by 2015.

Progress and Accomplishments: Groundbreaking education reform attracts \$250 million in federal Race to the Top funds, raising the charter cap and adding 33,500 new seats in autonomous schools.

Discretionary Funding Over 5 years: \$6.9 Million

Civic Leadership: Some 19 reports on K-12 and higher education were released at major forums and the Foundation helped to develop K-12 reform policy, writing legislation to pursue reform and convening the Race to the Top Coalition—all of which played a primary role in passage of the 2010 Achievement Gap Act, leading to \$250 million in federal funds to the state.

Boston has one of the best urban school systems in America, but too many students are not prepared to succeed in their postsecondary pursuits. In 2009, the Foundation codified a two-track approach to this pressing issue, including investments in expanding Charter public schools alongside support for autonomies and innovation inside school districts statewide.

With powerful evidence that Charter public schools are having a real impact on increasing students success, both in reports it has published and studies conducted by national researchers, the Boston Foundation has sought an expansion of Charter public schools to provide more students with access to high quality education. The strategy also created pressure on the largest school district in the state to innovate and accelerate improvements, including driving decision-making to the school level, which can empower school-based educators to design and deliver programming that is tailored to students in their school. The Foundation set a goal of doubling the number of seats in autonomous schools, including Charter public schools outside of the school district, as well as schools with

autonomies inside school districts statewide, from 18,000 in 2009 to 36,000 by 2015.

Progress and Accomplishments

The Foundation has almost reached its ambitious goal, with 33,500 new seats in autonomous schools in Boston (including Pilot, Commonwealth Charter, Turnaround, Extended Learning Time, Innovation, and Horace Mann Charter Schools).

The Boston Foundation contributed to the new policy for education reform, helped write the legislation and convened the Race to the Top Coalition, which successfully advocated for sweeping education reform legislation in late 2009. The Achievement Gap Act, signed by former Governor Deval Patrick in January of 2010, created new tools for school districts to intervene in underperforming schools, and doubled the number of Charter public schools seats in low-performing school districts.

The Race to the Top Coalition’s role in passing the Achievement Gap Act attracted \$250 million in Race to the Top federal funding for Massachusetts and a doubling of Charter public schools.



In addition, the Boston Public Schools has benefited tremendously from the Foundation’s relentless focus on school autonomies through commissioned research, public forums and grant making, which has helped to fundamentally change the conversation about structural reform. “Autonomy” is now an accepted tool in the education reform toolbox. The Foundation also invested in programs supporting Boston Public Schools students and families, including funding for pilot programs and policy efforts to fund a longer school day and bring autonomy to all schools.

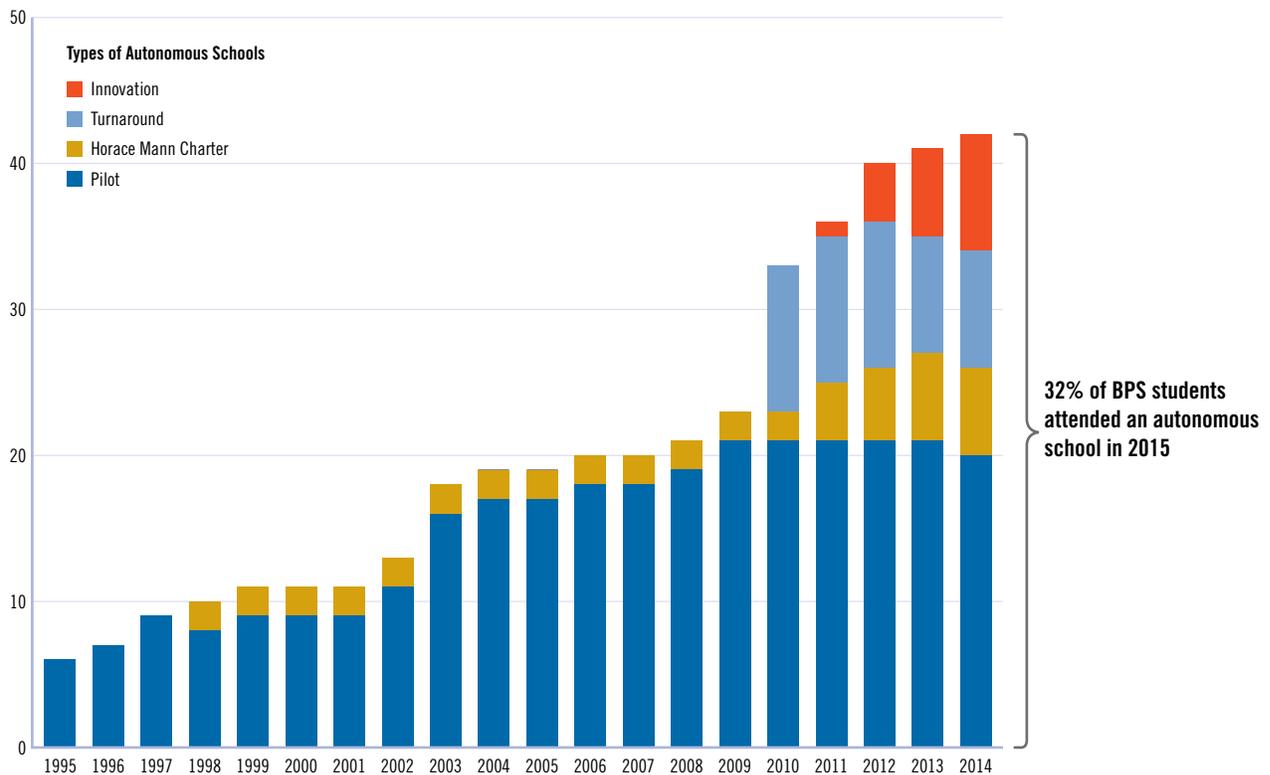
Shortfalls and Future Challenges

The Boston Foundation is proud of its progress in this area of critical need for Boston, but much remains to be done to ensure quality schools for every child and prepare them to succeed in their post-secondary pursuits and in their careers. It has become increasingly clear that many children

begin school completely unprepared to learn—and there still is no guarantee that every child in Boston will attend a high-performing school. The Foundation will continue its focus on structural reform while exploring how to pair structural reforms with investments in the education pipeline, in K-12 and earlier.

Despite significant progress and accomplishments, the Foundation and its many partners have encountered roadblocks to success. The Race to the Top Coalition’s 2014 legislative push to increase the charter cap was unsuccessful, limiting the further expansion of autonomous schools. However, new leadership promises positive change. Boston Mayor Martin J. Walsh, Massachusetts Governor Charlie Baker, Education Secretary James Peyser and Tommy Chang, the new Superintendent of the Boston Public Schools, are all open to collaborate to create more autonomous schools across the district and charter sector.

Growth of Autonomous Schools in the Boston Public Schools System 1995–2014



Source: A 2014 *Understanding Boston* report: *The Path Forward*

The Boston Opportunity Agenda



The Boston Foundation also joined together with public/private partners to have an impact on the entire education pipeline—from cradle to career. The Boston Opportunity Agenda was launched in 2010

as a partnership among the City of Boston, the Boston Public Schools, the Boston Foundation, the city's other major charities and a number of foundations. The goal was to collaborate on an investment strategy that would fund a set of initiatives along the entire education pipeline and report annually on progress toward a series of ambitious goals. Since then, others have joined the public/private partnership and are working together to see that all Bostonians have access to the education necessary for economic mobility, civic engagement and lifelong learning.

With many partners—ranging from early education and care providers to summer camps and local businesses—the Agenda's aim is to improve every aspect of the cradle-to-career pipeline. From kindergarten readiness to college completion and adult education, it is setting ambitious goals and investing in programs to help meet them. An annual report is published based on ongoing data tracked by the Boston Indicators Project.



The Boston Foundation is proud of its progress in this area of critical need for Boston, but much remains to be done to ensure quality schools for every child that prepare them to succeed in their post-secondary pursuits and in their careers.

Selected Grantees

Total Grants from December, 2009 through 2014

Bessie Tarrt Wilson Initiative for Children: \$280,000

Boston Plan for Excellence (for the Boston Public Schools): \$642,000

Boston Public Schools: \$600,000

Massachusetts Charter Public School Association: \$1.1 million

UP Education Network: \$550,000



The Boston Foundation co-founded Success Boston, which is aimed at increasing two- and four-year college graduation rates for low-income, minority and first-generation college students from the Boston Public Schools as well as workforce certificates.

EDUCATION: College Completion

College Completion at a Glance



Goal: Increase the post-secondary completion rate from 35% for the Boston Public Schools (BPS) class of 2000 to 52% for the BPS Class of 2009 and 70% for the Class of 2011.

Progress and Accomplishments: Retention and graduation rates have increased significantly for Boston Public Schools graduates, with the Class of 2007 achieving a 50% graduation rate.

Discretionary Funding Over 5 years: \$7.5 Million

Civic Leadership: Seven reports were released on college completion and several focused on community colleges. The Foundation also convened of the Coalition FOR Community Colleges, which led to sweeping changes in these postsecondary institutions, aligning them more closely with the state’s workforce needs.

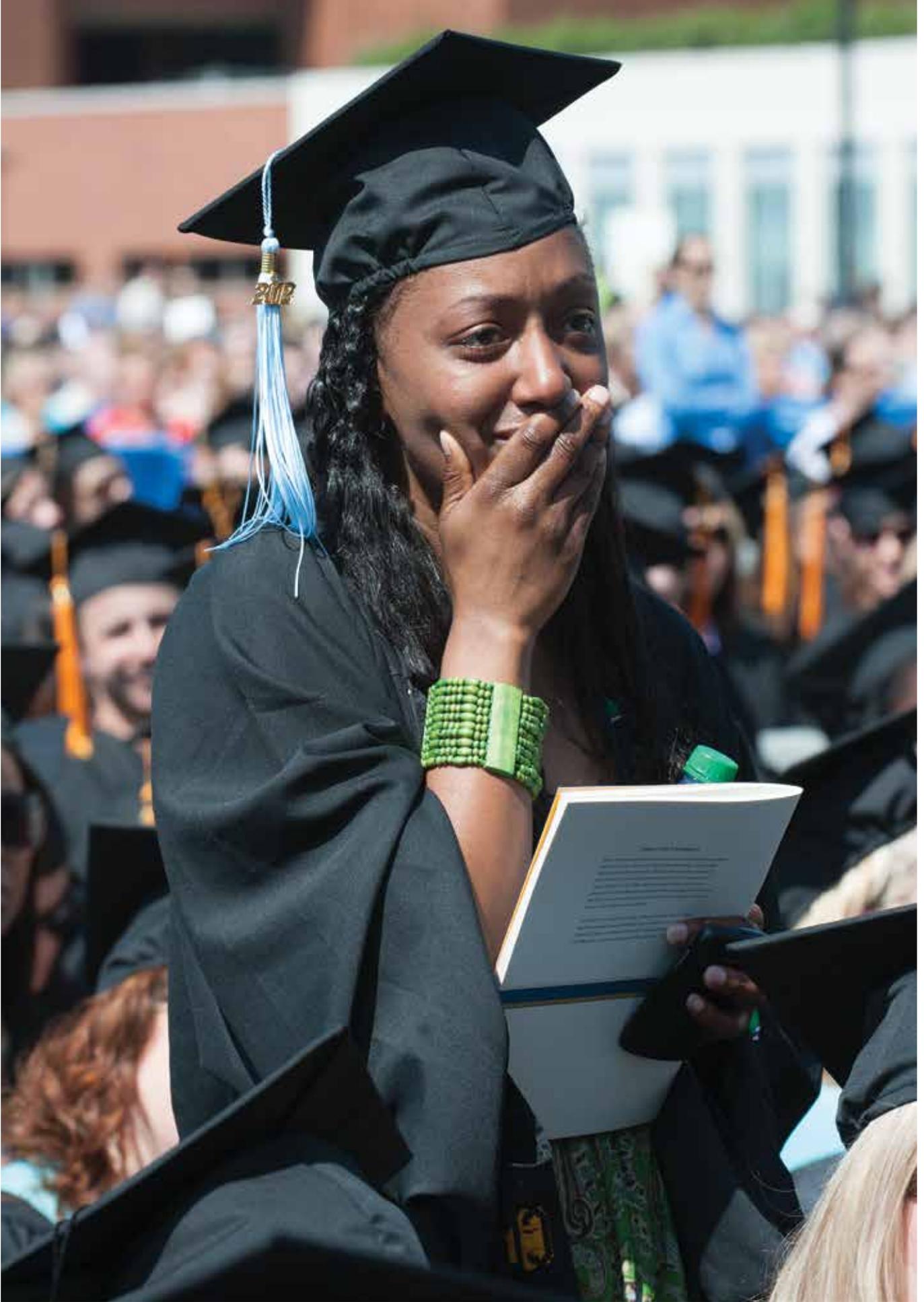
By 2018, 68% of jobs in Massachusetts will require a postsecondary education.¹ Even middle-skill jobs, those that require more than a high school education but less than a four-year college degree, will comprise 44% of job openings. A 2008 report, *Getting to the Finish Line*, commissioned by the Boston Private Industry Council and funded by the Boston Foundation, showed that while the enrollment rates of Boston Public Schools (BPS) graduates were rising, college completion rates for two- and four-year degrees remained abysmally low (39% of those enrolled in college for the BPS Class of 2000)². College graduation rates were lowest among blacks and Latinos, meaning that our fastest growing population groups were least likely to earn the credentials critical for the jobs of today and tomorrow.³

In 2009, to complement its K-12 structural reform strategy, the Boston Foundation launched a “college completion” strategy aimed at increasing two- and four-year college graduation rates for low-income, first-generation college students of color from the Boston Public Schools as well as workforce certificates. The Success Boston initiative is the centerpiece of this strategy.

Success Boston is a citywide public-private partnership dedicated to increasing the number of Boston Public Schools graduates who earn two- or four-year post-secondary credentials. This cross-sector collaboration between the Boston Public Schools, the City of Boston, the Boston Foundation, University of Massachusetts Boston and scores of other colleges and nonprofit organizations is particularly focused on low-income, first-generation students of color.

Success Boston aims to achieve a 70% six-year post-secondary completion rate among students who enroll in college from the class of 2011 and beyond.

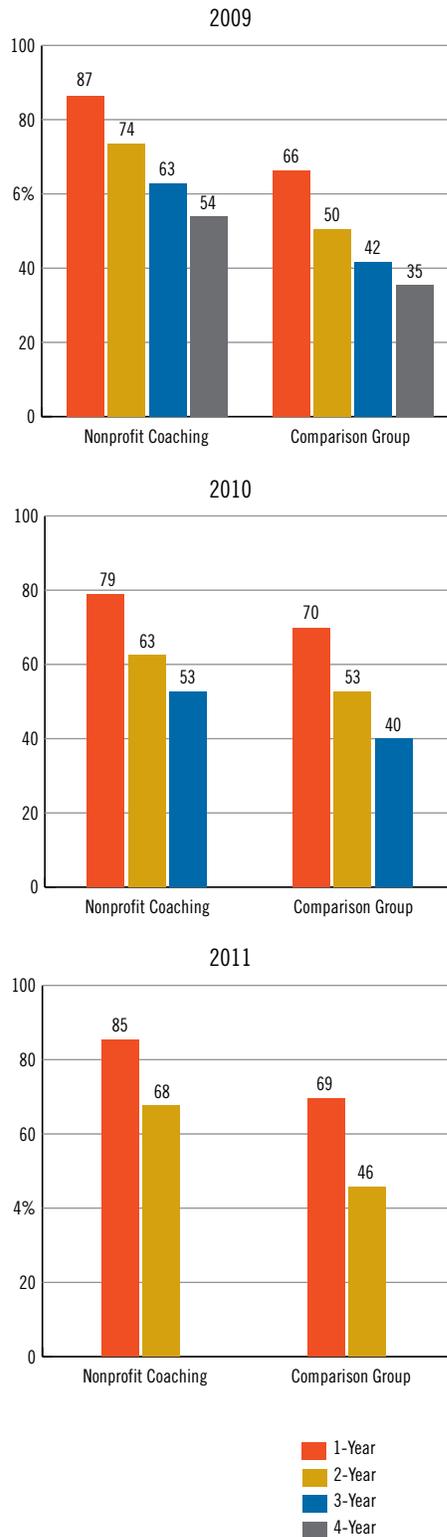
A key component of the Success Boston framework of “Getting Ready, Getting In, Getting Through, and Getting Connected” is the Boston Coaching for Completion transition coaching model. Nonprofit coaches are paired with a student, typically beginning in the senior year of high school and continuing through at least the second year of college. These coaches assist students with transitioning to and making it through college, helping them develop problem solving skills and self-efficacy, connecting them





Since the Boston Foundation launched its College Completion strategy in 2009, retention, graduation and completion rates have increased significantly.

College Persistence Rates for BPS Graduates (2009-2011) Enrolled in Seven Colleges in the Fall Following Graduation



to resources on and off campus, and building “college knowledge.” Success Boston has provided coaching to approximately 300 students per year, totaling more than 2,000 over the life of the initiative, and has been generously supported by Boston Foundation donors and national foundations along with substantial funding from the Boston Foundation.

Specifically, the goal is to increase the post-secondary completion rate to 52% for the BPS Class of 2009 and 70% for the Class of 2011. A 52% completion rate would nearly match national average completion rates; to date, no American city has achieved a 70% rate.

Progress and Accomplishments

Since the Boston Foundation launched its College Completion strategy in 2009, retention, graduation and completion rates have increased significantly with the most recent data, for the Boston Public Schools Class of 2007, suggesting a 50% graduation rate, coming quite close to achieving the 52% graduation rate set for the 2009 class.⁴

The Center for Labor Market Studies at Northeastern University completed a quasi-experimental analysis of Success Boston’s impact through 2014, comparing similar BPS graduates who did and did not receive coaching. Class of 2009 students who received coaching support had one-year college persistence rates that were 20 percentage points or more above their peers, with black and Latino students experiencing 17 to 22 percentage point gains. Two-year retention rates were also significantly higher, with Success Boston participants showing gains of more than 20 percentage points. Findings indicate that these dramatic results hold over time and across cohorts of students, with similar gains for the class of 2011.

In October of 2014, the Boston Foundation received a grant of \$2.7 million from the Corporation for National and Community Service to expand Success Boston. The Social Innovation Fund award gives the Foundation the resources necessary to expand Success Boston’s transition coaching model, Boston Coaching for Completion, from 300 to 1,000 annually. Coaching primarily focuses on the non-academic challenges: financial need, personal and emotional support, career and life planning

Boston Foundation Donor Support for Education

In addition to discretionary funds from the Permanent Fund for Boston, education receives tremendous support from donors with Donor Advised Funds at the Boston Foundation. For instance, from 2009 through 2014, donors gave more than \$130 million in grants in the area of education, including, but not limited to organizations and schools in Greater Boston.



The Boston Foundation convened the statewide Coalition FOR Community Colleges, made up of business and community leaders, which played a key role in passing a new performance-based funding approach for community colleges.

and better use of existing academic supports on campuses.

The community college system is particularly important for the postsecondary success of Boston students, with up to 30% of Success Boston participants choosing community colleges as their path to higher education. In 2012, Governor Deval Patrick embraced recommendations made in a report published by the Boston Foundation the year before about the need to align community colleges with the state's labor force needs. The Boston Foundation convened the statewide Coalition FOR Community Colleges, made up of business and community leaders, which played a key role in passing

a new performance-based funding approach for community colleges in the 2013 state budget and leveraging \$20 million in state funds to support the institutions.

Shortfalls and Future Challenges

The early results from Success Boston are very encouraging and the initiative is on track to reach its goals, but significant work remains to reach the ambitious goals for citywide completion rates. With community colleges, the Foundation is continuing to pursue additional reforms and now has a close relationship with community colleges, after encountering initial resistance to the reforms it proposed.

Selected Grantees

Total Grants from December, 2009 through 2014

Achieving the Dream: \$213,500

Posse Foundation: \$550,000

Single Stop: \$150,000

Success Boston: \$5.6 million

uAspire: \$1.6 million



Following its seminal 2007 report, *The Boston Paradox: Lots of Health Care, Not Enough Health*, the Boston Foundation realigned its work to focus on prevention and wellness.

HEALTH & WELLNESS



Health & Wellness at a Glance

Long-Term Goal: Work with public and private partners to lower rates of overweight and obesity in Boston and Massachusetts and reduce health care costs through a greater focus on prevention.

Short-Term Goal: Contribute to increasing youth physical activity in public schools in Boston.

Progress and Accomplishments: \$200 million in savings for towns and cities through Municipal Health Care legislation; an increase from 39% to 60% of students receiving at least 60 minutes of physical activity per week in the Boston Public Schools.

Discretionary Funding Over 5 years: \$4.8 Million

Civic Leadership: The Healthy People/Healthy Economy Initiative was created in response to a seminal report emphasizing the importance of focusing on health and wellness. The Initiative has published five annual reports tracking progress—and influenced the passage of a number of key policies by the state.

In 2009, obesity rates were high and rising, with combined overweight/obesity rates at more than 70% of Massachusetts residents⁵ and more than 30% of children, with marked disparities across racial/ethnic groups.⁶ Obesity contributes to diet-related chronic diseases, such as diabetes and heart disease, in turn, leading to unsustainably high health-care costs. As the largest expense in the state budget at the time, health-care spending was expected to grow an average of 6.7% per year for the next 10 years, outpacing inflation and economic growth and crowding out investment in other priorities and social determinants of health, including education, public safety, environment and recreation, public health, and mental health, among others.⁷

Following its seminal 2007 report, *The Boston Paradox: Lots of Health Care, Not Enough Health*, the Boston Foundation realigned its work to focus on prevention and wellness, shifting away from access to health care. The Foundation set out to work with one of its close partners, NEHI

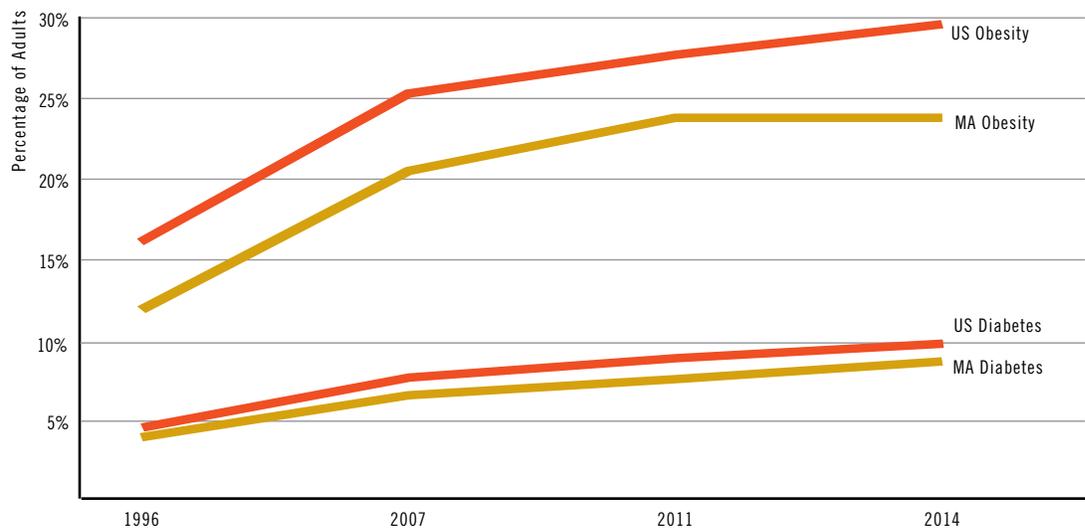
(Network for Excellence in Health Innovation) to lower rates of overweight and obesity in Boston and Massachusetts and reduce health-care costs through a greater focus on prevention. With this ambitious goal in mind, the Foundation crafted a new strategy focused on creating healthy community environments. It also joined with NEHI to create the Healthy People/Healthy Economy Initiative, which is aimed at making Massachusetts the national leader in health and wellness. The Initiative has released an annual “Report Card” tracking and evaluating the policies, programs and practices designed to improve the health of our state’s residents.

Since 2009, the Foundation’s strategy has continued to evolve from an initial focus on community-based physical activity, neighborhood food access and nutrition education programs, to systemic change investments in food systems and increased school-based physical activity as well as policy change. The Foundation set a short-term goal of increasing youth physical activity



Obesity and Diabetes in Massachusetts and the U.S. 1996–2014

Three-year averages



Source: CDC National Vital Statistics data 1996–2014, as viewed at America’s Health Rankings, www.americashealthrankings.org

in schools. This is a key component for reducing obesity in the long term as well as an important independent goal yielding positive health outcomes immediately.

Progress and Accomplishments

While the larger issues the Foundation has taken on in the health arena involve long-term, generational change, significant progress has been made toward the goal of increasing access to regular physical activity in schools. The proportion of K-8 schools in the Boston Public Schools system with an existing wellness policy providing at least 60 minutes of physical activity per week increased from 39% to 60% from the 2010/2011 school year to the 2012/2013 school year.⁸ Approximately 32% of Boston public school students, including 60% of Boston’s elementary school students, participate in Boston Foundation-funded physical activity programming.⁹

In addition, the Foundation has made deep investments in Mass in Motion, the statewide anti-obesity campaign launched by the Massachusetts Department of Public Health in 2008. More than 50 cities and towns have been designated as Mass in Motion communities.

Another notable area of success was policy change. Legislative efforts, including the advocacy of the Foundation-supported Massachusetts Public Health Association, contributed to the creation of a school wellness advisory committee requirement, the Prevention and Wellness Trust Fund, the Active Streets Certification Program and the most stringent School Nutrition Guidelines in the country. Additionally, with Boston Foundation staff serving on the District Wellness Council, the Boston Public Schools District Wellness Policy includes both Physical Education and Physical Activity requirements. The combined effect of policy and innovations programs has yielded positive results. Since 2009, the rates of overweight and obesity among BPS students have declined by 4.2%.¹⁰

Within its work to increase healthy consumption and access to healthy foods, the Foundation contributed to legislative victories including school nutrition legislation, creation of the Massachusetts Food Policy Council, and the \$2 million Healthy Fresh Food Financing Initiative. Boston Foundation funding also supported the growth, staffing and permanence of the Boston Food Policy Council situated in the

Investing in a Whole School Approach to Physical Activity



To get kids moving enough to truly have an impact on their health, the Boston Foundation believes in a “whole school” approach to physical activity. This means providing opportunities to be active before school, in school, during recess and after school.

In addition to leading legislative

efforts for school physical activity requirements, the Foundation also directly funds a portfolio of physical activity programs that focus on activity across the day:

Before and during school: The Reebok Foundation’s BOKS initiative, an innovative before-school physical activity program for elementary and middle school students in the Boston Public Schools, integrates vigorous before-school exercise with other physical activity and team building exercises throughout the school day.

Recess: Playworks, a program with demonstrated success in Greater Boston and across the country, provides structured recess activities for students that improve health, strengthen student academics and reduce bullying.

Physical Education and out-of-school: Sportmen’s Tennis and Enrichment Center provides academic, wellness and social development programs alongside tennis instruction in Dorchester. Community Rowing, Inc., a Brighton-based program, offers recreational indoor and outdoor rowing programs for Boston youth, both in Physical Education and out-of-school programming.

Throughout the day: The 100 Mile Club inspires elementary school students to walk, jog or run 100 miles during the course of the school year during PE, school hours, at lunch and recess, and before or after school hours.

Alongside its policy and direct programming investments, the Foundation has also funded several independent research studies to understand the effectiveness of key physical activity programs, both in terms of activity and the linkage to academic performance.



The Foundation contributed to legislative victories including school nutrition legislation, creation of the Massachusetts Food Policy Council and the \$2 million Massachusetts Food Trust.



The goal is to reduce the health disparities that continue to exist by zip code and socioeconomic status.

Mass in Motion by the Numbers

Boston Foundation Investment in Mass in Motion
\$425,000

Mass in Motion communities statewide
60+

Communities participating in the Healthy Market Initiative
25

Mayor’s office, which is now coordinating all food access efforts for the city.

The Foundation was also a seed funder of the Massachusetts Convergence Partnership—a multi-funder, cross-sector collaborative focused on system and environment change—and a founding funder of the collaborative Mass in Motion, a statewide anti-obesity campaign. This multi-faceted effort has shown a decrease in obesity/overweight rates in its communities of 2.4% over 3 years (compared to a decrease of 0.4% in comparable non-Mass in Motion communities). More than 60 cities and towns have been designated as Mass in Motion communities, touching some 28% of the state’s population.

Shortfalls and Future Challenges

Lowering overall rates of obesity and overweight and slowing health-care costs are massive, long-term goals requiring huge, long-term solutions. Repeated attempts to advance legislation to remove the sales tax exemption for sugar-sweetened beverages have failed, as a result of a reluctance on the part of some in the legislature to impose what they consider to be a new tax. In addition, data collection and measurement continue to be a challenge for food access efforts, and the Foundation

has not been able to pinpoint progress on individual healthy eating habits in relation to its investments.

While there is much progress to celebrate—with Massachusetts ranking as the 4th-healthiest state in the nation according to the Trust for America’s *State of Obesity* report. This good news is not shared equitably across our population. For example, Massachusetts has the 4th highest rate of obesity among 2- to 4-year-olds in low-income households.¹¹ By first grade nearly 30% of Massachusetts children are overweight or obese,¹² suggesting the necessity for approaches that reach children earlier and address social and environmental factors.

The Foundation will seek to deepen its partnership with Boston Public Schools to continue physical activity programming in a way that is sustainable, measurable, and reaches the most vulnerable populations. The goal is to reduce the health disparities that continue to exist by zip code and socioeconomic status. Additionally, the Foundation has begun investing in efforts to address obesity in early childhood, trying to address the issue before children even enter school. Making the healthier choice the easier choice will lead to healthier outcomes for all residents.



Selected Grantees

Total Grants from December, 2009 through 2014

Community Rowing: \$150,000

Kraft Center for Community Health: \$310,000

Mass in Motion: \$400,000

Playworks: \$825,000

Sportsmen’s Tennis and Enrichment Center: \$500,000





The Boston Foundation's work in jobs and economic development has included significant experimentation to identify approaches that have the potential for transformational change.

JOBS & ECONOMIC DEVELOPMENT



Jobs & Economic Development at a Glance

Jobs and Economic Development Goal: Increase inner-city job and entrepreneurship opportunities that allow all residents to thrive.

Career Advancement and Economic Security Goal: Increase family economic self-sufficiency through workforce development and other investments.

Progress and Accomplishments: More than \$30 million in new state funding for workforce programs through SkillWorks since 2003 and more than 5,000 immigrants received English-language learning opportunities.

Discretionary Funding Over 5 years: \$11.3M (\$8.7M for workforce development, \$2.6M for other efforts)

Civic Leadership: The Foundation commissioned and produced major reports on manufacturing in Massachusetts that aligned higher education with workforce needs. It also published the first major report on English language services for new Bostonians and helped to found the Massachusetts Life Sciences Collaborative, which led to the creation of the Massachusetts Life Sciences Center and \$1 billion in funding for the field.

The economic climate for low-income families in Boston is as challenging as that of any major city in America. Given Boston's high cost of living, working families need to earn four times the minimum wage to attain self-sufficiency. In 2006, 35.6% of working families with children had incomes below Family Self Sufficiency Standard (FESS) levels, around \$65,000 for a family of four.¹³

In addition, inner-city neighborhoods remain economically isolated. Unemployment in Roxbury, Dorchester, Mattapan and Hyde Park sat at 15.6% during the period from 2006-2010, compared to 9.3% for Boston as a whole.¹⁴ These neighborhoods also lack the business diversity and growth found elsewhere in Boston, with the lowest lending rates in Massachusetts continuing to be recorded in communities of color as of 2012.¹⁵ A widely held assumption that regional

prosperity generates inner-city prosperity was countered by new research,¹⁶ which found that inner city economic growth is largely independent of regional economic growth.

The Boston Foundation's work in jobs and economic development has included significant experimentation to identify approaches that have the potential for transformational change within these challenging circumstances. What began as a strategy focused on workforce development and career advancement, evolved into a three-part strategy focused on supporting:

- Workforce Development;
- Entrepreneurship; and
- Innovation.

Together, these approaches aim to increase urban job and entrepreneurship opportunities that allow all residents to thrive. The Foundation





The Foundation's workforce development efforts have focused on several core investments, most notably the funder collaborative SkillWorks.

SkillWorks by the Numbers

Progress since 2003

13 workforce partnerships created or expanded	1,491 job seekers enrolled	2,578 incumbent workers
	78% job placement rate	55% wage increase rate
		14% promotion rate

Multiplier Effect

(Nearly \$20 million raised from private philanthropy)

X

(More than \$7 million in new employer investments in workforce partnerships)

X

(Nearly \$4 million contributed by public funders)

X

(More than \$30 million in new state funding for workforce programs secured through public policy)

invests in workforce development programs through employer partnerships, facilitates the creation and growth of local businesses, connects low-income adults and teens to jobs and entrepreneurship opportunities and accelerates innovation in low-income areas. This work in community economic development remains particularly experimental as the Foundation continues to learn and develop its strategies.

Progress and Accomplishments

The Foundation's workforce development efforts have focused on several core investments, most notably the funder collaborative SkillWorks, which the Foundation launched in 2003 through a partnership with national and local funders. SkillWorks brings together philanthropy, government, community organizations, unions and employers to improve workforce development in Boston and Massachusetts. It is the largest public/private investment in workforce development in Boston's history, and has become a model for cities across the country and for the National Fund for Workforce Solutions.

With ongoing investments from the Boston Foundation, the City of Boston, Bank of America and several national and local foundations, SkillWorks aims to help low-skill, low-to-moderate-income residents move to family-sustaining jobs and help employers find and retain skilled employees. It builds partnerships of employers and community-based organizations designed to address the needs of low-income workers and businesses, advocates for investments in workforce development, and builds the capacity of workforce development service providers.

SkillWorks has served more than 1,700 individuals with an average starting wage for those who gained employment of \$14.45/hour and influenced the creation of the national Workforce Competitiveness Trust Fund.

Additionally, the Foundation has made a deep investment in helping newcomers to Boston gain the language skills they need to enter and advance in the job market. English for New Bostonians (ENB), a partnership focused on English-language learning opportunities, has served some 5,000 immigrants since 2009. In

2014, 74% of ENB's unemployed students found jobs and 48% of employed students found better jobs or received promotions.

In the area of entrepreneurship, the Foundation was "There at the Beginning" for the Bornstein & Pearl Food Production Center. A grant of \$100,000 to Dorchester Bay Economic Development Corporation helped to transform the old Pearl Meats factory in the city's Grove Hall neighborhood. In 2014, the ribbon was cut on the transformed 36,000-square-foot facility. It is now a light industrial food business incubator with a focus on small-scale food production. The anchor tenant and on-site property manager is Commonwealth Kitchen, which offers commercial kitchen facilities and technical support to food businesses in various stages of growth. Some 20 food businesses, including food trucks, are among the 42 companies based at Bornstein & Pearl and more are coming.

Currently, 61% of the businesses are Women Owned Businesses; 41% are Minority Owned Businesses; and the facility is home to 150 jobs.

Shortfalls and Future Challenges

While the challenges loom large in this sector, where success is hard to measure in broad terms, this is an exciting time for the Foundation's jobs and economic development work as it continues its partnership with SkillWorks and other workforce development initiatives while building on early experimentation with newer



approaches to urban entrepreneurship and innovation.

The Foundation is in the early stages of supporting seminal work in innovation and entrepreneurship. It recently made a grant of \$450,000 to MassChallenge to launch the first cohort of an Entrepreneurs Partnership Network, an effort to extend the benefits of this world-class startup accelerator to Boston's inner city entrepreneurial community. The first cohort is 90% people of color and 70% women, and includes many participants from inner-city Boston neighborhoods. The goal is to increase the participation rate of women and underrepresented people of color in the innovation economy, with a particular focus on STEM and Food Systems as major economic drivers in Boston. The second cohort, which will consist of 20 entrepreneurs, will begin in the winter of 2015 and conclude in the spring of 2016.

Selected Grantees

Total Grants from December, 2009 through 2014

English for New Bostonians: \$725,000

Family Independence Initiative: \$704,500

Jewish Vocational Service: \$500,000

MassChallenge: \$500,000

SkillWorks: \$1.7 million



The Boston Foundation has a long history, dating back to the 1960s, of increasing neighborhood stability through the production and preservation of affordable housing.

NEIGHBORHOODS & HOUSING: Housing



Goal: Increase neighborhood stability through the production and preservation of affordable housing.

Progress and Accomplishments: More than 12,000 new units of Smart Growth housing in 32 municipalities zoned; 1,000 new units through Home Funders; 1,200 new units in the Fairmount Corridor.

Discretionary Funding Over 5 years: \$6.2 million, plus \$13.5 million in Program Related Investments and Loan Guarantees

Civic Leadership: The Foundation publishes the annual “Greater Boston Housing Report Card” and convened the Commonwealth Housing Task Force, leading to passage of Chapters 40R and 40S in 2004. Since then, smart growth districts in 32 municipalities have been established with 12,812 units under construction.

Boston has among the highest housing costs in the country, exceeded only by New York City and San Francisco. A lack of affordable housing undermines the stability of families, with one in every four renters in the Boston metropolitan area paying more than half of their income in rent. Competition for neighborhoods with access to transit, quality schools and affordable housing pushes low-income families to neighborhoods that lack these features. Additionally, high housing costs threaten the region’s economic competitiveness, making it hard to attract talent.

The Boston Foundation has a long history, dating back to the 1960s, of increasing neighborhood stability through the production and preservation of affordable housing. To meet this goal, it makes grants to community development corporations (CDCs) and the intermediaries and advocacy organizations that support them. It also convenes the Commonwealth Housing Task Force, which seeks to promote dense “Smart Growth” housing near transportation nodes. In response to the foreclosure crisis of 2009, the Foundation supported neighborhood stabilization efforts focused on reducing the effects of foreclosure on neighborhoods and anti-poverty efforts along the Fairmount Corridor.

Since 2003, the Foundation also has published an annual *Understanding Boston* report called *The Greater Boston Housing Report Card*, researched and written by economist and housing expert Barry Bluestone. The reports have informed the Foundation’s strategies and helped housing advocates across the region to address the most serious trends in housing and affordability.

Progress and Accomplishments

Home Funders, a philanthropic collaboration co-founded by the Boston Foundation, exceeded its goal of creating 1,000 units of housing for extremely low-income and formerly homeless families. The Foundation also made grants and even loans to nonprofits engaged in renovating or building permanent supportive housing—such as Pine Street Inn, Hearth, Harborlight, Jackson Square Partners, Somerville CDC, the Fairmount CDC Collaborative and others.

When the foreclosure crisis hit in 2008, the Foundation funded the creation of a statewide task force to seek solutions, resulting in the Neighborhood Stabilization Loan Fund (NSLF). This \$23 million public, private and philanthropic fund, to which the Foundation contributed



Smart Growth Housing by the Numbers

The Commonwealth Housing Task Force wrote the legislation for “Smart Growth” Housing, resulting in:

36
Chapter 40R Smart Growth zoning districts

32
municipalities across Massachusetts participating

Some **12,812** units of Smart Growth housing zoned



\$2 million, focused on preventing blight in the communities most heavily impacted by the crisis. The NSLF further leveraged \$50 million in federal money, contributing to the turnaround of 751 units statewide and 128 units in 46 locations throughout Boston.

Building on advocacy and legislative efforts of the Boston Foundation-convened Commonwealth Housing Task Force, which developed the strategy for and wrote the legislation that created Chapters 40R and 40S, known as “Smart Growth” housing, the Foundation is proud that 36 Chapter 40R Smart Growth zoning districts have been established in 32 municipalities and a total of approximately 12,812 zoned units. The Foundation also advocated for the passage of the Housing Preservation Act to prevent the conversion of affordable units to market rate housing, and contributed to the creation of a \$6 million

Transit Oriented Development pre-development and acquisition loan fund.

In 2009, when the *Thriving People, Vibrant Places* framework was announced, the Boston Foundation had not fully developed what would become a stated geographic focus on the neighborhoods surrounding the Fairmount Commuter Rail Line, particularly Roxbury, Dorchester and Mattapan.

The Corridor is an area so populous, with some 200,000 residents, that if it were a city, it would be ranked the third-largest in New England. Almost one-third of residents in these neighborhoods are under the age of 18 and more than one-third of those children live in poverty. For many years, the residents of this large swathe of the city were virtually stranded, with no efficient way to commute to their jobs, go to school or just do the weekly grocery shopping.

A commuter train, which decades earlier had transported residents to downtown Boston, flew by these neighborhoods, barreling from Hyde Park to South Station with no stops in between.

All of that began to change about 20 years ago, when a grassroots movement, seeded by grants from the Boston Foundation, rose up, sparking what became the largest community led planning initiative in the city's history. The movement advocated forcefully for new stations in the un-served neighborhoods.

The Foundation's support of the Fairmount-Indigo Planning Initiative was aimed at leveraging the MBTA's \$200 million in transit improvements to the Fairmount-Indigo Commuter Line. In 2009, effective advocacy led to real results: the Commonwealth announced that it would comply with a court order to build four new stations along the Fairmount-Indigo Line. The first new station was slated to open in 2013.

By 2012, the Boston Foundation was organizing tours of the Fairmount Corridor, and identifying it as a major geographic focus. The goal was to leverage the area as a 'Corridor of Opportunity' and create transformational change by building the collective power of the neighborhoods to ensure that the benefits of public,

private and philanthropic investments accrue to residents and are sustained over time.

The Foundation also focused on supporting and facilitating broader community development along the Fairmount Corridor. Through its funding of CDCs working in the Corridor, it has supported the development of close to 1,200 affordable housing units.

Shortfalls and Future Challenges

While the Boston Foundation made meaningful contributions to the issues of housing and neighborhood stability—particularly in the context of the 2009 crisis—housing affordability remains a critical issue for Boston and the region. Given the enormous costs of building housing and the magnitude of the additional housing needed, the Foundation's approach of directly funding developers has not made the best use of limited funding. Instead, policy reform efforts and targeted grant making that seek to address the root causes of the affordability issue make better use of limited capital. The Foundation's housing work has also been tested by significant external challenges, including shrinking federal resources, increasing construction costs, intractable politics and persistent low wages.



The Boston Foundation invested \$20 million in the Fairmount Corridor, helping to leverage \$200 million in MBTA dollars.

Selected Grantees

Total Grants from December, 2009 through 2014

A Better City: \$230,000

Accion U.S.A., Inc.: \$225,000

Fairmount/Indigo Line CDC Collaborative: \$1 million

Hearth: \$350,000

Local Initiatives Support Corporation (LISC): \$825,000



In 2008, concerned about gun violence in the Boston’s poorest neighborhoods, the Boston Foundation took the unprecedented step of creating its own program.

NEIGHBORHOODS & HOUSING: Violence Prevention



Violence Prevention at a Glance

Goal: Interrupt cycles of street violence in the neighborhoods most affected.

Progress and Accomplishments: More than 400 active gang members were engaged by StreetSafe Boston, with many referred to important services; My Summer in the City provided some 200 jobs for youth and 250 programs in 17 neighborhoods.

Discretionary Funding Over 5 years: \$6.4 million

Street violence is a major contributor to neighborhood instability and suffering in urban centers across the country. In 2008, concerned about gun violence in Boston’s poorest neighborhoods, the Boston Foundation took the unprecedented step of creating its own initiative, at the urging of Robert Lewis Jr., then Vice President for Program at the Foundation. Called StreetSafe Boston, the initiative used street workers to focus on 20 of the city’s most active gangs as well as young people at risk of gang involvement. The initiative deployed street workers to engage with gang members and at-risk youth and steer them toward opportunity—including education, job training, housing, health care and other resources.

The Boston Foundation pledged \$1 million a year for five years to the effort and partnered with the late Mayor Thomas M. Menino, the Boston Police Department and other civic leaders and organizations to intervene in the five identified neighborhoods along a 3.4-square-mile stretch of Blue Hill Avenue in Roxbury, Dorchester and Mattapan, where the vast majority of violence occurs.

Progress and Accomplishments

StreetSafe Boston’s streetworker model succeeded in building relationships with more than 400 active gang members connecting many with services, such as health care and education. The Initiative also influenced similar programs internationally,

leading to a focus on young people who are not only in gangs, but at risk for gang involvement. A number of those reached have entered job-training programs or enrolled in college.

In December of 2014, the Foundation announced that StreetSafe Boston merged with the City’s Violence Interrupter program under the direction of the City of Boston’s Boston Centers for Youth & Families. The Boston Foundation continues to support the effort, but is no longer engaged in operating the initiative.

Shortfalls and Challenges Going Forward

Gun violence continues to tear at the fabric of Boston’s neighborhoods. Recent tragic shootings and deaths have sparked a resurgence of the kind of community response that led to the “Boston Miracle” of the 1990s, which saw an alliance between communities of faith, the nonprofit sector and the Boston Police Department.

While StreetSafe Boston succeeded in building relationships with some of the city’s most disconnected young people, establishing these connections took significantly longer and required more intensive resources than the Foundation had originally anticipated. As a new program created and managed directly by the Boston Foundation, it represented an entirely new operating challenge for the foundation, straining staff and resources.





Beyond StreetSafe Boston



The Boston Foundation has invested in other major efforts that directly address the issue of youth violence. With a \$5,000 grant and free office space from the Foundation, Monalisa Smith, whose nephew was gunned down in Roxbury in 2010, began organizing mothers whose children

had been murdered on the streets of Boston. Since then, the Foundation has given more than \$175,000 to the organization and members of Mothers for Justice and Equality have worked tirelessly against violence through meetings with public officials, educational programs and outreach to families whose children were killed. The nonprofit now has 800 members and a Civic Leadership Academy that equips mothers to be catalysts for change in their homes and in their neighborhoods. It also trains inner-city youth in grades 8-12 through its Junior Advocates program and is planning to help other cities replicate its model.

In addition, through the My Summer in the City program, the Boston Foundation has sought to alleviate the usual uptick in violence that accompanies warm weather and school vacation. It has made \$1.25 million in grants to close to 30 community-based organizations, underwriting 200 youth jobs, and supporting more than 250 free programs in 17 neighborhoods.

My Summer in the City By the Numbers

\$1.25 million
in grants

Some
30
community-based
organizations
participating

More than
200
jobs for young
people

More than
250
free programs
in **17**
neighborhoods

Selected Grantees

Total Grants from December, 2009 through 2014

Boston Public Health Commission: \$250,000

Mothers for Justice and Equality: \$175,000

Root Cause: \$150,000

StreetSafe Boston: \$5 million

The Base: \$125,000



The Boston Foundation's Arts and Culture strategy has strived to strengthen and celebrate Boston through full participation by community members, strong arts organizations and the elevation of culture.

ARTS & CULTURE



Arts & Culture at a Glance

Goal: Strengthen and celebrate Boston through full participation, strong cultural organizations and the elevation of culture.

Progress and Accomplishments: The Massachusetts Cultural Facilities Fund has invested \$82.5 million in arts institutions; the Boston Public Schools Arts Expansion Initiative has increased weekly arts participation for pre-K-8th grade students from 67% to 87%, with a doubling of the percentage of high school students receiving arts instruction.

Discretionary Grants Over 5 years: \$6.7 million

Civic Leadership: The Foundation helped to launch a campaign that led to the creation of the Massachusetts Cultural Facilities Fund, which has pumped more than \$82 million into the development of cultural facilities in 118 cities and towns.

Arts and Culture are crucial components of our community's social and economic fabric. The arts capture the uniqueness of our own experiences and simultaneously help us to discover our fundamental connectedness to others. Greater Boston is home to more than 1,500 arts nonprofits. In addition to enriching the cultural opportunities of our city, these organizations support some 26,000 jobs and contribute \$1 billion into the local economy each year through direct spending.¹⁷ However, most Massachusetts cultural nonprofits, regardless of budget size, are financially fragile. More than half ran deficits in 2008 prior to the full impact of the recession.¹⁸ In addition, the audiences¹⁹, leadership and programming of cultural nonprofits do not always reflect Boston's diverse populations.²⁰

The Boston Foundation's Arts and Culture strategy has strived to strengthen and celebrate Boston through full participation by community members, strong arts organizations and the elevation of culture. Through 2009, the strategy focused on advocacy, arts education, creative youth development and capacity- and audience-building. In 2011, the Foundation began

to emphasize the support of community-based artists and partnerships, linking its arts strategy to its broadening participation in culturally relevant programming and activities along the Fairmount Corridor.

Progress and Accomplishments

The Massachusetts Campaign for Cultural Facilities was launched by the Boston Foundation, the Massachusetts Cultural Council and MAASH (a statewide arts advocacy group and a predecessor of MASSCreative), with the goal of establishing a state fund to strengthen cultural facilities across the Commonwealth. The campaign was formed in response to a groundbreaking 2004 report released by the Boston Foundation, *Culture is Our Common Wealth*, which identified a vast array of facility and infrastructure needs among the state's cultural institutions and brought a sense of urgency to the issue. As a result of the campaign, the Legislature created the Cultural Facilities Fund in 2007 as part of an economic stimulus bill to provide resources to maintain and rebuild the state's cultural venues. By 2009, dozens of





cultural institutions were benefiting from the new resources. Since then, the Fund has invested \$82.4 million in the development of cultural facilities in 118 cities and towns. These investments have leveraged more than \$1.5 billion in spending on building projects for arts, history and science institutions, and have supported more than 16,000 jobs for architects, engineers, contractors and construction workers.

The Boston Foundation also was “there at the beginning” for MASSCreative, a successor to MAASH and an advocacy organization that has two primary missions: educate the public about the importance of arts and culture as a public good and build a grassroots movement to advocate for public policy changes that support the arts. Launched in 2012, it grew out of two years of discussion among the Massachusetts

Cultural Council, the directors of various cultural institutions and the Boston Foundation, which provided pre-startup grants as well as \$325,000 in operating funds.

The Boston Foundation also was a key player in planning and funding the Boston Public Schools Arts Expansion Initiative through EdVestors, which has contributed to an increase in weekly in-school arts participation opportunities for pre-K-8th grade students from 67% in 2009 to 87% in 2014. In addition, the Initiative has more than doubled the percentage of high school students receiving any arts instruction to 57%, increased public investment by \$5 million—and added almost 80 full-time arts specialists to schools.

The Foundation also made investments of \$4.4 million in capitalization and capacity

building grants to 32 small- and mid-sized cultural organizations. The Foundation's emphasis on building cash reserves has helped change the way the region's nonprofit boards and leadership look at their balance sheets. These investments also strengthened grantees' ability to expand audiences through marketing and relevant programming and to encourage community participation in arts and culture.

The Boston Foundation also raised \$480,000 from ArtPlace America and \$200,000 from the Kresge Foundation, alongside additional support from the Barr and Surdna Foundations, for a "creative placemaking" initiative in the Fairmount Corridor. This innovative effort links arts and culture to neighborhood revitalization and economic development in the Uphams Corner, Dudley Street and Four Corners neighborhoods and local schools. Ten "Expressing Boston" fellows, mostly local artists, are working on public art productions; five artists-in-residence are working with residents to re-imagine their communities; and a major public art installation is in the final design stage.

Shortfalls and Future Challenges

The Foundation's strategy within the arts is one of continued experimentation and exploration as it examines opportunities for working alongside donors in this space, as well as how to further strengthen its focus on the arts as a catalyst for community development and change. The City of Boston's "Boston Creates" initiative, on which a member of the Boston Foundation serves, is dedicated to drafting a blueprint for arts and culture in the city. It is in the midst of a 15-month planning process that is providing an opportunity for many neighborhoods to share their thoughts on the city's most important cultural assets. No doubt, the Boston Foundation's approach going forward will be informed by this exciting planning process. In addition, the Foundation recently released a major report, *How Boston and Other American Cities Support and Sustain the Arts*, updating the challenges facing the sector since the publication of its report *Funding for Cultural Organizations in Boston and Nine Other Metropolitan Areas* in 2003.



The Foundation's emphasis on building cash reserves has helped change the way the region's nonprofit boards and leadership look at their balance sheets.

Massachusetts Cultural Facilities Fund

\$82.4 million invested statewide

118 cities and towns benefited

\$1.5 billion leveraged

More than **16,000** jobs created

Selected Grantees

Total Grants from December, 2009 through 2014

Boston Children's Chorus: \$400,000

Boston Public Schools Arts Expansion Initiative: \$600,000

José Mateo Ballet Theatre: \$365,000

MASSCreative: \$325,000

Upham's Corner Creative Placemaking Initiative: \$625,000



The Foundation's
Nonprofit
Effectiveness
Strategy invested
a total of \$1.82
million to
help grantee
organizations build
their operational
effectiveness.

Cross-Cutting Strategies

In addition to its impact area grant making and civic leadership, the Boston Foundation also has conducted other work that doesn't fit neatly into the strategic framework that was announced in 2009—but has nonetheless played a critical role in supporting the Greater Boston and Massachusetts nonprofit communities.

Nonprofit Effectiveness Strategy

The Boston Foundation's Nonprofit Effectiveness (NPE) Group has focused on three approaches to supporting and increasing the effectiveness of the Greater Boston nonprofit community and individual organizations: strengthening leadership; building capacity to drive social change; and promoting and facilitating strategic, data-driven philanthropy.

Strengthening leadership

Institute for Nonprofit Management and Leadership
Recognizing that exceptional leadership is a critical determinate of nonprofit success, NPE works to strengthen, diversify and provide networking opportunities for nonprofit leaders through a core investment in the *Institute for Nonprofit Management and Leadership* (INML). Since its founding in 2007, INML has educated and provided networking opportunities to almost 600 nonprofit leaders, with an emphasis on leaders of color, through its Core Certificate Program and the Community Fellows Program. The Boston Foundation serves as one of INML's long-standing funding partners, which has included "There at the Beginning" support during its founding, long-term unrestricted support and additional seed funding to launch INML's Community Fellows Program, which focuses on strengthening a pipeline of emerging nonprofit leaders with a special focus on people of color.

Out of the Blue Grants

Beginning in 2002, the Foundation has awarded *Out of the Blue* grants to high performing nonprofits that make a difference in Greater Boston communities as a way for it to further recognize and reward effective and collaborative community leadership. Eight organizations have received Out of the Blue grants since 2009.

Building capacity to drive social change

The Capacity Building Fund

The NPE's capacity-building fund offers support and resources to boost the individual and collective capacity of nonprofits. Investments from the Capacity Building Fund strengthen the work of the Foundation's strategic framework by providing complementary operational capacity-building support to core nonprofit grantees, effectively doubling down on the Foundation's investment impact areas. Additionally, through this fund, NPE invests in entities that contribute to the nonprofit sector's capacity-building infrastructure. From 2009 to 2014, NPE committed a total of \$1.82 million to support 70 grantee and nonprofit field-building engagements.

The Vision Fund

The NPE further increases organizational capacity through the Vision Fund, a grant-making program that supports capacity-building work and pilot projects for nonprofits that otherwise would not receive funding from the Foundation. Since 2009, more than 190 grants totaling almost \$1 million from this fund have helped increase organizational effectiveness and seed innovation within Greater Boston's nonprofits.

Collaborate Boston

The Collaborate Boston prize competition, which provides funding to cross-sector, resident-led collaborations, supports a variety of projects that enhance the Foundation's strategic framework. One Collaborate Boston winner, Black and Brown Boys at the STEM of Success, put prize funding into action and created new, hands-on robotics teams for boys of color at eight Boston Public Schools elementary and middle schools. This collaborative project among the Latino STEM Alliance, the Boston Public Schools Achievement Gap Office and Northeastern University gave struggling students a new, hands-on opportunity for out-of-school time STEM learning to boost their academic success. Since the project's completion, the partners expanded the collaborative model to serve additional schools and began offering robotics programming to young women throughout Greater Boston. The Collaborate Boston model was recently featured in the peer-reviewed national journal, *The Foundation Review*.

Catalyst Fund for Nonprofits

The Boston Foundation is also a lead partner in the Catalyst Fund for Nonprofits, a funder collaborative created to provide technical support for organizations at varying stages of deep strategic collaborations and mergers. From 2009-2014, the Catalyst Fund made 40 funding commitments in support of 33 collaborative ventures.

Massachusetts Nonprofit Network

The Boston Foundation was "There at the Beginning" for the Massachusetts Nonprofit Network, which unites and strengthens the Commonwealth's nonprofit sector through advocacy, public awareness and capacity building.



Facilitating strategic, data-driven philanthropy

The Giving Common

The NPE Group also developed and maintains the Giving Common, a free online resource to inform data-driven, strategic philanthropy. The Giving Common allows nonprofit organizations to tell their story, drawing on their financial data—as well as information on their programs, impact, governance and management. Since its launch in 2012, more than 1,000 nonprofits have raised the visibility of their in-depth stories to donors and funders through the Giving Common. Donors, funders and other visitors to the site can search by issue area, geography and other variables with the option to "donate now" with their credit card or through a Boston Foundation Donor Advised Fund. My Life My Choice, an organization dedicated to preventing the sexual exploitation of adolescent girls, experienced firsthand the powerful impact that sharing their personal programmatic and financial story on the Giving Common could have on their relationship with funders and donors. As one division of a much larger organization, they leveraged the Giving Common to share critical information with donors and funders about their own data, board, financials and staff that are housed within their parent organization, and even develop a new funding relationship with the local philanthropic learning and giving foundation, SheGives.

The Action Fund by the Numbers

Total Grants Made
\$1.5 million

Size of Grants
**\$200 to
\$10,000**

Average Grant Size
\$3,500

Grassroots Strategy

The Action Fund

Over the last three years, through its Action Fund, the Boston Foundation has focused on “Grassroots” grantees identified through a proactive model that involves embedding a full-time staff person in Boston’s neighborhoods. The Director of the Grassroots Grant Making program seeks out people who are making change happen and identifies opportunities to support and strengthen their work.

Action Fund grants support a range of efforts that bring people together, deliver “return on community,” and encourage social responsibility. Action Fund projects are led by community leaders and residents who partner with a public agency, a faith-based institution or a nonprofit organization. To date, the Action Fund has made more than \$1.5 million in small grants, ranging from \$200 to \$10,000 and averaging some \$3,500.

A robust grassroots community has emerged as a result of this work, with members partnering with the Boston Foundation to promote its Race to the Top Coalition strategies to close the achievement gap among children in the state’s educational system.

In a number of cases, the Boston Foundation was “There at the Beginning” with small grants from the Action Fund that have had an outsized impact on inner-city Boston. One example is Mattapan’s Finest, a local Grove Hall barbershop owned by Jamie Mitchell, who recruits more than two-dozen local barbers and hairstylists to volunteer their time the Sunday before Boston’s public schools open every fall. Support from the Action Fund has enabled the annual “Cut and Curl” event to grow from 100 children in its first year to more than 350 in its fourth year, providing each child with a backpack full of school supplies, lunch and, of course, a new hairstyle. Building on the success of Cut and Curl, Mattapan’s Finest has since partnered with the Boston Public Health Commission to offer information, workshops and free health clinics to the barbershop’s patrons once a month.

The lessons learned and connections made through the Foundation’s grassroots grant making over the past five years have ranged from targeted events to transformational opportunities—each starting with the power of people.



Contributions Beyond the Impact Area Goals

In addition to the Foundation's work designed to meet the five impact area goals established for the *Thriving People/Vibrant Neighborhoods* framework, the Foundation also responds to issues that are important to the people of Greater Boston but do not fall within this framework. Here are a few examples:

Criminal Justice

For Boston to succeed in the 21st century economy, the city will need “all hands on deck,” including ex-offenders who are trying to gain employment, housing and a toehold on a new life. But often ex-offenders—and even people charged but not convicted of breaking the law—were prevented from moving forward by the state's criminal offender record information (CORI) system. In 2010, Massachusetts passed landmark legislation to reform the state's CORI system. The new law was informed by four reports published by the Boston Foundation in partnership with the Crime and Justice Institute at Community Resources for Justice and dialogues that took place during the forums at which the reports were released. A report published in 2012, called *The Continuing Challenge of Cori Reform*, described the progress made to date and the challenges that remain.

Utility of Trouble Reports and Progress

The Boston Foundation also has published a series of reports, under the title *The Utility of Trouble*, designed to respond to issues that rise to the surface through the media and public action. One report, *Leveling the Playing Field: Giving Municipal Officials the Tools to Moderate Health Insurance Costs*, led to the passage of municipal health care reform by the legislature in 2011. The report focused on the consequences of uncontrolled health care costs—and led the Foundation to mobilize civic and business leaders in support of the reforms. The legislation has saved more than 125 municipalities and school districts more

than \$200 million in a wave of reform that is transforming municipal health insurance and helping stabilize finances after years of cutbacks, leading to increased funds for law enforcement and other vital municipal services.

Meeting Basic Needs and Emergency Funding

The Boston Foundation's Food and Fuel Fund was launched in 2008 following the downturn in the economy and news reports of dramatic increases in the price of food and fuel for Massachusetts residents at a time of shrinking resources. Since then, through a combination of Foundation grant making resources and donors' additional generous contributions, the Fund has disbursed nearly \$3 million to a range of organizations serving individuals and families particularly vulnerable to the rising fuel and food costs.

The Fund supports nonprofit organizations that work to meet basic and emergency needs over the winter months, a time of year when demand increases while costs rise, and families are under increased pressure to stretch limited dollars. Through one-time, unsolicited grants, the Fund supports organizations that implement immediate, short-term and long-term interventions to prevent or diminish needs in areas such as food, shelter and heating. The Foundation's donors also responded generously when, in October of 2014, Boston's Long Island Bridge was deemed unsafe, leading to the abrupt closing of crucial shelter and transitional programs on Long Island in Boston Harbor. The Boston Foundation responded by reaching out to dozens of donors with Donor Advised Funds, leading to more than \$100,000 in funding to Friends of Boston's Homeless. The funding helped to provide vital services to the 400 homeless people who were abruptly forced to evacuate a shelter and transitional program on Long Island.

Municipal Health Care Reform by the Numbers

Cities and Towns Participating
125

Dollars Saved for Vital Services
\$200 Million

Conclusion



The last five years have been a fascinating, exhilarating, sometimes vexing process of exploration, achievement and disappointment for the Boston Foundation.

As is clear in this report, there is a discrepancy among the five impact areas of the framework when it comes to the Foundation's capacity for measuring impact and progress.

Some areas, especially **Education**, which routinely tests and evaluates the success of students, are rich with detail and provide hard numbers and charts from multiple sources that can be studied and interpreted. According to the information the Foundation has gathered and tracked, a great deal of progress took place in this sector, both on the K-12 and college level. But following students over the years to see exactly how a high-quality or low-quality education affects their lives is a life-long proposition.

Health & Wellness can be measured in a myriad of ways, but the trends toward obesity and poor health in our city and across the country have been developing for decades and most likely will take decades to turn around. In the meantime, fresh food is more available in Boston's inner-city neighborhoods and opportunities for physical activity in our schools are increasing every day. The Foundation made a shift away from contributing to a focus on access to "health care" to the importance of "health and wellness" and it is convinced that that emphasis should continue going forward.

In **Housing**, numbers of new units can be counted, but not the quality of the life that housing supports nor the impact of living in a city that has an unacceptable gap between the rich and the poor. A large percentage of new housing is being built for a very small, elite group of people, while low-income people struggle and the middle class finds the city increasingly hard to afford.

When it comes to safety issues, in the area of **Violence Prevention**, the city is caught in a heartbreaking cycle that once, in the 1990s, was stopped, showing all of us that it could happen and can happen again. Today, there is a growing resolve about that issue as too often the newspapers relay tragic stories of lives cut off before their prime.

In the complex area of **Jobs & Economic Development**, we can count the number of people trained for the workforce, but the general improvement of opportunity in Boston's neighborhoods is harder to measure—although there is an excitement now that suggests a promising future for new small businesses, entrepreneurs and innovators.

Arts & Culture may be the hardest sector of all to "measure." The Foundation is proud to have helped shore up the crumbling conditions of so many of our state's cultural institutions and can point to data, including the numbers of jobs created and income generated from those efforts. But the effect of the arts on the hearts and souls of our people is almost impossible to grasp until you go to a concert or a museum and see the faces of those being touched by the experience. The Foundation is excited about the new leadership in City Hall and applauds efforts to ask the people in Boston's neighborhoods themselves what they think, want and need when it comes to cultural and artistic expression.

One outcome was very clear: the Boston Foundation had the greatest impact when it approached an issue using all of its roles, including grant maker, civic leader and partner with donors. The Foundation's published research often lifts issues to the forefront and informs and illuminates challenges. When the increase in information leads to media coverage, the development and implementation of successful legislative strategies and the

convening of broad-based coalitions to influence change, the results can be game changing.

Civic leadership can drive change within and beyond the Foundation's impact areas, as it did in the case of municipal health care legislation. An example of the power of partnering with the Foundation's donors is the prompt response to the closure of the Long Island homeless shelters in late 2014.

In almost every impact area, partnership and collaboration were key to success. For a number of strategies, partnerships led to the kind of progress that could not have been made by the Foundation alone. Some of these partnerships include the Success Boston College Completion Initiative, the Healthy People/Healthy Economy Initiative, SkillWorks and the Commonwealth Housing Task Force. No organization can be effective working in a vacuum. And when philanthropy joins with other nonprofit partners, government, the business community and, especially, the people living in Boston's neighborhoods, great things can be achieved.

Boston is in the midst of a time of change and opportunity. Going forward, the Boston Foundation will take all of the lessons it has learned over the last five years and apply them to its plans for the future. Above all, it will continue to report on the achievements, disappointments and challenges of its own work, the nonprofit organizations it supports, the donors who are at the center of everything the Foundation does—and the people it cares deeply about and exists to serve.



Endnotes

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3. Between 2008 and 2018, new jobs in Massachusetts requiring postsecondary education and training will grow by 148,000 while jobs for high school graduates and dropouts will grow by 25,000.
4. Up from the original baseline of 35.5%, which was subsequently revised upward to 39% due to increased accuracy of National Student Clearinghouse data.
5. The Behavioral Risk Factor Surveillance System (BRFSS) is a state-based system of health surveys that collects information on health risk behaviors, preventive health practices, and health care access primarily related to chronic disease and injury. For many states, the BRFSS is the only available source of timely, accurate data on health-related behaviors.
6. The Youth Risk Behavior Surveillance System (YRBSS) monitors six types of health-risk behaviors that contribute to the leading causes of death and disability among youth and adults. YRBSS includes a national school-based survey conducted by CDC and state, territorial, tribal, and local surveys conducted by state, territorial, and local education and health agencies and tribal governments; Physical Examination of School Children, 105 CMR 200.000.
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