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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ *Do not enter social security numbers on this form as it may be made public.*

▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending , 20

Name of foundation: BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS

A Employer identification number: 04-3148824

Number and street (or P.O. box number if mail is not delivered to street address): 101 HUNTINGTON AVENUE SUITE

Room/suite: 1300

B Telephone number (see instructions): (617) 246-5000

City or town, state or province, country, and ZIP or foreign postal code: BOSTON, MA 02199-7611

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 109,347,688.

J Accounting method: ☐ Cash [X] Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,139,432.			
	2 Check ▶ ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,579,541.	2,579,541.		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	5,472,960.			
	b Gross sales price for all assets on line 6a 15,321,106.				
	7 Capital gain net income (from Part IV, line 2)		5,472,960.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule) ATCH 2	7,132,674.			
	12 **Total.** Add lines 1 through 11	16,324,607.	8,052,501.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)[3]	-87,671.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	118,714.			118,714.
	21 Travel, conferences, and meetings	262,978.			262,978.
	22 Printing and publications	9,212.			9,212.
	23 Other expenses (attach schedule) ATCH 4	3,624,610.			3,624,610.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	3,927,843.			4,015,514.
	25 Contributions, gifts, grants paid	3,487,407.			3,487,407.
	26 **Total expenses and disbursements** Add lines 24 and 25	7,415,250.			7,502,921.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	8,909,357.			
	b **Net investment income** (if negative, enter -0-)		8,052,501.		
	c **Adjusted net income** (if negative, enter -0-)				

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	476,199.	735,543.	
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ 20,549.			
		Less allowance for doubtful accounts ▶	40,563.	20,549.	
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable	67,162.	72,518.	
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule)			
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule) ATCH 5	100,924,828.	109,278,908.	109,278,908.
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶ ATCH 6)	33,257.	68,780.	68,780.
	16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	101,542,009.	110,176,298.	109,347,688.
Liabilities	17	Accounts payable and accrued expenses	48,278.	608.	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ ATCH 7)	1,134,902.	907,505.	
	23	**Total liabilities** (add lines 17 through 22)	1,183,180.	908,113.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ [X] **and complete lines 24 through 26, and lines 30 and 31.**			
	24	Unrestricted	100,358,829.	109,268,186.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	100,358,829.	109,268,186.	
	31	**Total liabilities and net assets/fund balances** (see instructions)	101,542,009.	110,176,299.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	100,358,829.
2	Enter amount from Part I, line 27a	2	8,909,857.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	109,268,186.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	109,268,186.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	SEE PART IV SCHEDULE			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	5,472,960.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8	3	0.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	8,201,105.	78,818,128.	0.104051
2015	8,608,136.	82,384,031.	0.104488
2014	7,923,915.	85,504,402.	0.092673
2013	7,096,584.	82,465,714.	0.086055
2012	7,615,780.	82,960,289.	0.091800

2	Total of line 1, column (d)	2	0.479067
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	0.095813
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	77,015,222.
5	Multiply line 4 by line 3	5	7,379,059.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	80,525.
7	Add lines 5 and 6	7	7,459,584.
8	Enter qualifying distributions from Part XII, line 4	8	7,502,921.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	80,525.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2	
3	Add lines 1 and 2	3	80,525.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	80,525.
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017 — 6a: 149,305.		
b	Exempt foreign organizations - tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	149,305.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	68,780.
11	Enter the amount of line 10 to be **Credited to 2018 estimated tax** ▶ 68,780. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered See instructions ▶			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ BCBSMAFOUNDATION.ORG

14 The books are in care of ▶ MICHAEL CARDER Telephone no ▶ 617-246-5000

Located at ▶ 101 HUNTINGTON AVENUE SUITE 1300 BOSTON, MA ZIP+4 ▶ 02199-7611

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year, did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____ , ____ , ____ , ____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b		X
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ ____ , ____ , ____ , ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b		X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

			Yes	No
5a	During the year, did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
	(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions	5b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 8		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶

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Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
ATCH 9		756,238.
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 THE MISSION (PURPOSE) OF THE BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION INC. IS TO EXPAND ACCESS TO HEALTH CARE THROUGH GRANTS & POLICY INITIATIVES, THE FOUNDATION	
2 WORKS WITH PUBLIC AND PRIVATE ORGANIZATIONS TO BROADEN HEALTHCARE THROUGH GRANTS AND POLICY INITIATIVES. THE FOUNDATION WILL FOCUS ON DEVELOPING SOLUTIONS THAT BENEFIT	
3 UNINSURED, VULNERABLE AND LOW INCOME INDIVIDUALS AND FAMILIES IN THE COMMONWEALTH. THROUGH CATALYST GRANTS, THE FOUNDATION IS A RESOURCE FOR	
4 MINI GRANTS OF UP TO $5,000 TO ORGANIZATIONS SERVING THE HEALTH NEEDS OF LOW INCOME AND UNINSURED RESIDENTS OF MA.	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a	Average monthly fair market value of securities	1a	78,188,043.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	78,188,043.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	78,188,043.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	1,172,821.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	77,015,222.
6	**Minimum investment return.** Enter 5% of line 5	6	3,850,761.

Part XI **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ▶ ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6			1	3,850,761.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	80,525.		
b	Income tax for 2017 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	80,525.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	3,770,236.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	3,770,236.
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	3,770,236.

Part XII **Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes.		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	7,502,921.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	7,502,921.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions	5	80,525.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	7,422,396.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				3,770,236.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only				
b Total for prior years 20 15 ,20 14 ,20 13				
3 Excess distributions carryover, if any, to 2017				
a From 2012 . . . 3,545,075.				
b From 2013 . . . 3,046,038.				
c From 2014 . . . 3,774,127.				
d From 2015 . . . 4,572,468.				
e From 2016 . . . 4,298,743.				
f **Total** of lines 3a through e	19,236,451.			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ $ 7,502,921.				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2017 distributable amount				3,770,236.
e Remaining amount distributed out of corpus	3,732,685.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	22,969,136.			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	3,545,075.			
9 **Excess distributions carryover to 2018.** Subtract lines 7 and 8 from line 6a	19,424,061.			
10 Analysis of line 9				
a Excess from 2013 . . . 3,046,038.				
b Excess from 2014 . . . 3,774,127.				
c Excess from 2015 . . . 4,572,468.				
d Excess from 2016 . . . 4,298,743.				
e Excess from 2017 . . . 3,732,685.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test- enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year - see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2))

NOT APPLICABLE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NOT APPLICABLE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc , to individuals or organizations under other conditions, complete items 2a, b, c, and d See instructions.

a The name, address, and telephone number or email address of the person to whom applications should be addressed

ATCH 10

b The form in which applications should be submitted and information and materials they should include

ATCH 11

c Any submission deadlines

ATCH 12

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

ATCH 13

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHMENT 16			SEE ATTACHMENT 16	3,487,407.
Total ▶ 3a				3,487,407.
b Approved for future payment				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a ATCH 14				1,139,432.	
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	2,579,541.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	5,472,960.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b ATCH 15					7,132,674.
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				9,191,933.	7,132,674.

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 16,324,607.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
4	DIVIDENDS PROVIDE INCOME FOR FUTURE GRANT MAKING AND MISSION ACTIVITIES
8	THE GAIN OR LOSS FROM SALE OF ASSETS ARE UTILIZED TO PROVIDE FOR FUTURE GRANT MAKING AND MISSION ACTIVITIES

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of.			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X	

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? [X] Yes [ ] No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
ATCH 16		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

AUDREY SHELTO — 11/14/18 — PRESIDENT

Signature of officer or trustee — Date — Title

May the IRS discuss this return with the preparer shown below? See instructions [ ] Yes [X] No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no	

JSA
7E1493 1 000
6742ED E24M

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2017

Name of the organization	Employer identification number
BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS	04-3148824

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000, or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS

Employer identification number 04-3148824

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BOWER FOUNDATION GRANT - HC FELLOWSHIP 578 HIGHLAND COLONY PARKWAY SUITE 120 RIGELAND, MS 39157	$ 20,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
2	ROBERT WOOD JOHNSON FOUNDATION ROUTE 1 & COLLEGE ROAD EAST, PO BOX 2316 PRINCETON, NJ 08543-2316	$ 33,837.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
3	EMPLOYEES OF BLUE CROSS BLUE SHIELD OF M 101 HUNTINGTON AVENUE SUITE 1300 BOSTON, MA 02199-7611	$ 132,450.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
4	BCBS OF CA FOUNDATION HC FELLOWSHIP 50 BEALE STREET 14TH FLOOR SAN FRANCISCO, CA 94105	$ 20,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
5	BLUE CROSS BLUE SHIELD OF MASACHUSETTS 101 HUNTINGTON AVENUE SUITE 1300 BOSTON, MA 02199-7611	$ 872,645.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
6	2017 HEALTH COVERAGE FELLOWSHIP - MAINE HEALTH ACCESS FOUNDATION PRINCETON, NJ 08543-2316	$ 18,500.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)

Name of organization BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS

Employer identification number 04-3148824

Part I ***Contributors*** *(see instructions). Use duplicate copies of Part I if additional space is needed.*

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	COGNIZANT US CORP CATALYST FUND SPONSOR 211 QUALITY CIRCLE COLLEGE ROAD, TX 77845	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
8	NASCO - CATALYST FUND SPONSORSHIP 1200 ABERNATHY ROAD, SUITE 1000 ATLANTA, GA 30320	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
9	PERFICIENT, INC. - CATALYST FUND SPONSOR 500 MARYVILLE UNIVERSITY DRIVE ST. LOUIS, MO 63141	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
10	ST. DAVID'S FOUNDATION 1303 SAN ANTONIO STREET, SUITE 500 SAN ANTONIO, TX 78701	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
11	EPISCOPAL HEALTH FOUNDATION 500 FANNIN ST. SUITE 300 HOUSTON, TX 77002	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
12	THE MISSOURI FOUNDATION FOR HEALTH 415 SOUTH 18TH STREET, SUITE 400 ST. LOUIS, MO 63103	$ 17,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS

Employer identification number 04-3148824

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

Name of organization BLUE CROSS AND BLUE SHIELD OF MASSACHUSETTS FOUNDATION FOR EXPANDING HEALTHCARE ACCESS

Employer identification number 04-3148824

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e)** and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year. (Enter this information once See instructions.) ▶ $ ____________
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

ATTACHMENT 1

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
TOTAL INVESTMENT INCOME		2,579,541.	2,579,541.
	TOTAL	2,579,541.	2,579,541.

ATTACHMENT 2

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
UNREALIZED GAIN ON INVESTMENTS		7,132,674.
	TOTALS	7,132,674.

ATTACHMENT 3

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS
TAX ON INVESTMENT INCOME	-87,671.
TOTALS	-87,671.

ATTACHMENT 4

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
POSTAGE AND TELEPHONE	8,796.	8,796.
EXTERNAL PROFESSIONAL SERVICES	1,647,661.	1,647,661.
PURCHASED SERVICES FROM BCBS	1,962,024.	1,962,024.
MISCELLANEOUS EXPENSES	6,129.	6,129.
TOTALS	3,624,610.	3,624,610.

ATTACHMENT 5

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
ACCESS CAPITAL COMM INV FUND	5,857,085.	5,857,085.
PUTNAM TOTAL RETURN FUND	9,337,386.	9,337,386.
PIMCO ALL ASSET FUND	8,210,212.	8,210,212.
SSGA S&P 500 TOBACCO FREE FUND	21,720,734.	21,720,734.
SANDERSON TOBACCO FREE IN FUND	22,898,263.	22,898,263.
PIMCO TOTAL RETURN FUND	11,151,650.	11,151,650.
IRONBRIDGE SM CAP LIFE CY FUND	6,861,467.	6,861,467.
CF DV DYNAMIC GROWTH FUND	8,717,364.	8,717,364.
SCHRODER EM MKT M/S BND-R6	4,869,803.	4,869,803.
SEGALL BRYANT & HAMILL INTL SM	5,551,405.	5,551,405.
SSGA US TIPS INDEX STRATEGY	4,103,539.	4,103,539.
TOTALS	109,278,908.	109,278,908.

ATTACHMENT 6

FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
FEDERAL EXCISE TAX RECOVERABLE	68,780.	68,780.
TOTALS	68,780.	68,780.

ATTACHMENT 7

FORM 990PF, PART II - OTHER LIABILITIES

DESCRIPTION		ENDING BOOK VALUE
DUE TO AFFILIATE BLUE CROSS AN		602,703.
FEDERAL INCOME TAXES ON INVEST		304,802.
	TOTALS	907,505.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 8

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
SEE ATTACHMENT 17				
SEE ATTACHMENT 17				
	GRAND TOTALS	0.	0.	0.

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALS

ATTACHMENT 9

NAME AND ADDRESS	TYPE OF SERVICE	COMPENSATION
ABT ASSOCIATES INC 55 WHEELER STREET CAMBRIDGE, MA 02138 PROFESSIONAL CONSULTING	CONSULTING	160,691.
MANATT, PHELPS & PHILLIPS LLP 7 TIMES SQUARE NEW YORK, NY 10036 PROFESSIONAL CONSULTING	CONSULTING	184,652.
AUS MARKETING RESEARCH SYSTEMS INC 53 WEST BALTIMORE PIKE MEDIA, PA 19063 PROFESSIONAL CONSULTING	CONSULTING	150,000.
TYE, LAWRENCE S 139A FAYERWAEATHER STREET CAMBRIDGE, MA 02138 PROFESSIONAL CONSULTING	CONSULTING	126,385.
URBAN INSTITUTE 2100 M ST NW WASHINGTON,, DC 20037 PROFESSIONAL CONSULTING	CONSULTING	134,510.
TOTAL COMPENSATION		756,238.

ATTACHMENT 10

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

AUDREY SHELTO
101 HUNTINGTON AVENUE SUITE 1300
BOSTON, MA 02199-7611
617-246-5000

ATTACHMENT 11

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

AUDREY SHELTO
TWO PAGE LETTER OF INQUIRY

ATTACHMENT 12

990PF, PART XV - SUBMISSION DEADLINES

AUDREY SHELTO
N/A

ATTACHMENT 13

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

AUDREY SHELTO
N/A

FORM 990-PF, PART XVI-A - ANALYSIS OF PROGRAM SERVICE REVENUE

ATTACHMENT 14

DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	AMOUNT	RELATED OR EXEMPT FUNCTION INCOME
CONTRIBUTIONS, GIFTS, AND GRANTS				1,139,432.	
TOTALS				1,139,432.	

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		REALIZED GAIN OR LOSS						
15321106.		9,848,146.					5,472,960.	
TOTAL GAIN(LOSS)							5,472,960.	

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 15

DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	AMOUNT	RELATED OR EXEMPT FUNCTION INCOME
UNREALIZED GAIN OR LOSS ON INVESTMENTS			14		7,132,674.
TOTALS					7,132,674.

ATTACHMENT 16

FORM 990PF, PART XVII, LINE 2B - INFORMATION REGARDING TRANSFERS

NAME OF ORGANIZATION	TYPE OF ORGANIZATION	DESCRIPTION OF RELATIONSHIP
BLUE CROSS AND BLUE SHIELD OF MA HMO BLUE, INC.	CORPORATION	AFFILIATE
HEALTHCARE ASSISTANCE FOUNDATION	CORPORATION	INACTIVE AFFILIATE

BCBSMA Foundation For Expanding Healthcare Access

[illegible]	[illegible]	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Catalyst Fund	Edward M Kennedy Community Health Center	650 Lincoln Street, Worcester MA 01605	$2,700.00	3/3/2017	Funding to purchase a pachymeter to screen and treat patients affected by glaucoma
Catalyst Fund	Wayside Youth & Family Support Network	1 Frederick Abbott Way, Framingham MA 01701	$1,465 00	3/3/2017	Funding to purchase an otoscope, EKG machine, medication, and nursing supplies
Catalyst Fund	Rogerson Communities, Inc	One Florence Street, Boston MA 02131	$5,000 00	2/1/2017	Funding to replace three residential style refrigerators in the Adult Day Center
Catalyst Fund	Northeast Center for Youth and Families, Inc.	203 East St , Easthampton MA 01027	$5,000 00	3/3/2017	Funding to upgrade the organization's IT infrastructure to include a remote services system that will improve the coordination of behavioral health services for clients, and ensure security of medical records
Catalyst Fund	Community Connections	261 Whites Path, Unit 1, South Yarmouth MA 02664	$4,431.00	12/1/2017	Funding to purchase a Hoyer Lift for the Day Habilitation Program
Catalyst Fund	President and Fellows of Harvard College (The Family Van)	1542 Tremont Street, Roxbury MA 02120	$5,000 00	12/1/2017	Funding to make necessary improvements to the bathroom facility and heating system
Catalyst Fund	The Joint Committee for Children's Health Care in Everett	484 Broadway, Room 27, Everett MA 02149	$4,710.00	10/26/2017	Funding to purchase six computers, a laptop and updated software, to enable more efficient outreach and enrollment
Catalyst Fund	Empty Arms Bereavement Support	140 Pine Street, Room 2B, Florence MA 01062	$3,000 00	11/30/2017	Funding to translate marketing materials into Spanish and to support stipends for bilingual peer hospital companions
Catalyst Fund	Plummer Youth Promise	37 Winter Island Road, Salem MA 01970	$2,000 00	12/1/2017	Funding to hire a consultant to strengthen the Board of Director's governance infrastructure
Catalyst Fund	Employment Options Inc	82 Brigham Street, Marlborough MA 01752	$5,000 00	12/1/2017	Funding to hire a website development consultant
Catalyst Fund	Peabody Health Department	24 Lowell Street, Peabody MA 01960	$5,000 00	5/30/2017	Funding to support professional development for nursing staff, printing of promotional materials, and medical equipment for the North Shore Mother Visiting Partnership
Catalyst Fund	Minute Man Arc for Human Services	35 Forest Ridge Road, Concord MA 01742	$5,000 00	4/26/2017	Funding to extend the services of a consultant grantwriter
Catalyst Fund	Roxbury Presbyterian Church Social Impact Center	328 Warren Street, Roxbury MA 02119	$4,500 00	6/29/2017	Funding to develop a curriculum guide for The Cory Johnson Program for Post-Traumatic Healing (The Program), for the purpose of replication at additional sites
Catalyst Fund	United Teen Equality Center	15 Warren Street #3, Lowell MA 01852	$5,000 00	6/29/2017	Funding to purchase and support training of a developmental screening tool and curriculum, the Ages and Stages Questionnaire, to be used by early educators and health care professionals to assess social emotional progress
	Urban Edge Housing	1542 Columbus Avenue, Roxbury MA 02119	$25,000 00	8/1/2017	Funding to be used solely to partner with the Family Van and Winn Companies to analyze the impact that housing support services have on the health of families most impacted by the social determinants of health (the "Project")
Catalyst Fund	The Good Shepherd's Maria Droste Services	1354 Hancock St , Room 203, Quincy MA 02169	$5,000 00	9/28/2017	Funding to purchase networked computers and phones
Catalyst Fund	Boston Area Rape Crisis Center	99 Bishop Allen Drive, Cambridge MA 02139	$5,000 00	5/30/2017	Funding to revamp the organization's website
Catalyst Fund	Mattapan Community Health Center	1575 Blue Hill Ave , Mattapan MA 02126	$5,000 00	9/28/2017	Funding to produce three videos that highlight the health center's mission and impact, targeting existing and potential patients, as well as donors
Catalyst Fund	Respond Inc	P O Box 555, Somerville MA 02143	$2,000 00	2/1/2017	Funding to support the production of new outreach materials in English and Spanish for the teen dating violence program
Catalyst Fund	Life Connection Center	192 Appleton St , Lowell MA 01852	$2,726 00	2/1/2017	Funding to support the salary of an Executive Director as well as technology equipment and marketing materials
Catalyst Fund	The Open Door	28 Emerson Avenue, Gloucester MA 01930	$5,000 00	3/3/2017	Funding to purchase nutrition and menu planning software for use by newly hired Dietician
Catalyst Fund	City of Gloucester	9 Dale Avenue, Gloucester MA 01930	$5,000 00	3/29/2017	Funding to purchase a NOMAD Pro handheld x-ray system
Catalyst Fund	Resilient Sisterhood Project	566 Columbus Avenue, Suite 3A, Boston MA 02118	$5,000 00	4/26/2017	Funding to hire a fundraising consultant and to train board members on governance, fundraising, and regulatory compliance
Catalyst Fund	Community Action, Inc	3 Washington Square, Haverhill MA 01830	$5,000 00	2/1/2017	Funding to purchase 22 non-contact thermometers for Head Start programs
Catalyst Fund	Boston Senior Home Care	89 South Street, Suite 501, Boston MA 02111	$4,875 00	2/1/2017	Funding to hire a grantwriter to implement a comprehensive grant program
Catalyst Fund	County of Dukes County	114 New York Avenue, Oak Bluffs, West Tisbury MA 02575	$5,000 00	2/1/2017	Funding to upgrade to a new phone system
Catalyst Fund	Exceptional Lives Inc	77 Heath Street, Brookline MA 02445	$5,000.00	10/26/2017	Funding to hire a social media consultant to develop a marketing strategy, broaden outreach, and increase access to families of children with disabilities
Connecting Consumers with Care	The Joint Committee for Children's Health Care in Everett	484 Broadway, Room 27, Everett MA 02149	$40,000 00	10/12/2017	The Joint Committee for Children's Health Care in Everett will promote messages about health insurance enrollment via its Facebook page, newsletters, and the City of Everett's website, place multilingual media ads and coordinate appearances and PSAs for radio stations and cable TV programs, coordinate large scale enrollment events in partnership with community organizations, offer weekly night drop-in sessions for clients to bring questions or copies of letters to receive group level assistance with enrollment questions, create a renewal flyer to explain the process to applicants, work with the Volunteer Income Tax Assistance agency to assist clients who must reconcile their tax credits, and maintain and develop referral systems with provider organizations
Connecting Consumers with Care	Greater New Bedford Community Health Center	874 Purchase Street, New Bedford MA 02740	$40,000 00	10/12/2017	Greater New Bedford Community Health Center will educate patients on practices that will help them obtain and maintain coverage, including an overview of the enrollment process, action steps needed, and key deadlines, set-up a secure drop-box for patients to deposit documentation to expedite the collection and application processes, develop reminder cards that highlight important dates, deadlines, and outstanding documentation, proactively review copies of patients' notification letters from MassHealth and the Connector to provide targeted assistance for those denied for coverage, and target outreach at self-pay patients, which the health center is seeing at increased rates, to discuss coverage options and assist in the enrollment process

BCBSMA Foundation For Expanding Healthcare Access

[illegible]	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Connecting Consumers with Care	Lowell Community Health Center	161 Jackson Street, Lowell MA 01852	$40,000 00	10/12/2017	Lowell Community Health Center will institute a "triage" system to improve efficiencies in how patients are provided with enrollment assistance, extend enrollment hours at the health center; provide educational workshops for clinic and agency staff; develop a reminder checklist on the importance of reviewing correspondence from state offices and completing the re-determination form to avoid gaps in coverage, establish a tracking system that enables staff to reach clients with timeline reminders about renewal dates and post-enrollment issues, develop a comprehensive, multilingual patient education flyer with key insurance information, participate in local community health events to promote insurance counseling and enrollment, create a multilingual brochure listing available health insurance options, and offer quarterly onsite educational sessions for providers, front line staff, and community agencies on health insurance topics
Connecting Consumers with Care	The Dimock Center	55 Dimock Street, Roxbury, MA 02119	$40,000 00	10/12/2017	The Dimock Center will utilize its practice management system to run registries of individuals who might be at risk of losing their coverage based on insurance transitions, lead workshops and information sessions at the health center and with community partner agencies to educate patients on how to apply for, enroll in, and maintain health coverage, notify patients within four to six weeks of application to ensured they received their coverage confirmation letter, remind them of any expiration or renewal dates, and confirm next steps to ensure coverage is maintained, set up alerts in the electronic health record to notify staff of coverage expiration dates a few weeks prior to flag patients that need help with renewal applications
Connecting Consumers with Care	Edward M Kennedy Community Health Center	650 Lincoln Street, Worcester MA 01605	$40,000 00	10/12/2017	Edward M Kennedy will expand assistance on weekend hours, assist in educating about 13,500 MassHealth patients who will be impacted by changes related to the 1115 waiver and transition to the Accountable Care Organization model, verify the insurance status of current patients days in advance of upcoming appointments, work with insurers to identify members who are up for renewal and provide assistance, formalize an outreach and enrollment network to identify at-risk individuals and refer them to the Outreach/Enrollment team, and partner with community centers and places of worship
Connecting Consumers with Care	Caring Health Center	1049 Main St, Springfield MA 01103	$40,000 00	10/12/2017	Caring Health Center will implement an extensive media and grassroots community outreach campaign to promote enrollment via multilingual television, radio, newspaper, print, social media, and website advertisements, deliver outreach at numerous community events and venues, support MassHealth members impacted by the Accountable Care Organization transition, increasing knowledge and awareness of new coverage options, develop and facilitate multilingual discussion groups to understand health system challenges, and develop facilitators' guides, educational handouts, and a survey instrument to assess consumers' understanding of public health insurance availability, policies, and literacy
Connecting Consumers with Care	Hilltown Community Health Centers, Inc	58 Old North Road, Worthington MA 01098	$40,000 00	10/12/2017	Hilltown Community Health Centers will partner with local community organizations, advertise and author articles in local newspapers and on social media, open a new site in Amherst, work with Managed Care Organizations, MassHealth, and the Connector to proactively identify consumers who need to renew their coverage, and provide assistance, work with employers, small businesses, business associations, home care agencies, and other organizations to reach part time, seasonally, and self employed people at risk for churn, and develop an advertising and social media campaign informing the public about the important of renewing coverage and open enrollment
Connecting Consumers with Care	East Boston Neighborhood Health Center	10 Gove Street, East Boston MA 02128	$40,000 00	10/12/2017	East Boston Neighborhood Health Center will conduct outreach in partnership with local community organizations, implement a pilot program for contacting self-pay patients to assist with re applying for health insurance, design a multilingual flyer series to educate patients on how to proactively ensure long term health insurance coverage, provide changes in status to MassHealth, how and when to make premium payments, how to use insurance when accessing services, and what to do if coverage is cancelled, and cross-train Call Center staff supporting clinical departments to provide appropriate health insurance information to support patients
Connecting Consumers with Care	Family Health Center of Worcester, Inc	26 Queen Street, Worcester MA 01610	$40,000 00	10/12/2017	Family Health Center of Worcester will conduct outreach with partner agencies, advertise Navigator services in local media, review all eligibility determination letters received from MassHealth and the Connector, proactively contacting patients who were denied or lost coverage, and assist them in completing the application or re-applying, use multilingual call center software to send auto reminders and targeted messages to patients with impending deadlines, provide group information sessions at agencies that serve target population, and host monthly orientations for new patients to help them understand how to navigate services at the health center

BCBSMA Foundation For Expanding Healthcare Access

Philanthropic [illegible]	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Connecting Consumers with Care	Ecu-Health Care, Inc	99 Hospital Ave Suite 208, North Adams Berkshire 01247	$40,000 00	10/12/2017	Ecu Health Care will conduct outreach in partnership with local community organizations and institutions, provide direct-to-consumer outreach via phone or mailings to Berkshire Medical Center uninsured patients as identified through an automated referral system, partner with other area health and human service organizations to establish an online referral system, review with clients the contents of a member packet including information on what changes to an account need to be reported, staying healthy with your new insurance, eligibility and benefits, how to make a payment, and advanced premium tax credits and expand digital media billboards, public broadcast, and radio advertising
Connecting Consumers with Care	Boston Public Health Commission	1010 Massachusetts Avenue 2nd Floor, Boston MA 02118	$40,000 00	10/12/2017	Boston Public Health Commission will maintain referral systems with community partners, host enrollment sessions throughout the city with a focus on the East Boston and Dorchester communities, leverage social media and local cable access, scale up flyering in census tracts with the highest rates of uninsured, with an emphasis on local businesses and community organization, and develop a multilingual plain language form that outlines when and how a consumer needs to update the state with pertinent information to maintain coverage
Connecting Consumers with Care	Community Action Committee of Cape Cod & Islands	372 North St., Hyannis MA 02601	$40,000 00	10/12/2017	Community Action Committee of Cape Cod & Islands will participate in outreach activities in Cape Cod and Nantucket, utilize local and social media to inform clients of updated information on MassHealth and Connector plans, outreach to unemployed populations through a partnership with Career Opportunities Center and to immigrant communities through the Immigration Resource Center; use plain language tools developed for multilingual audiences, and coordinate with Volunteer Income Tax Assistance tax sites in sharing materials with clients as they receive tax preparation assistance
Connecting Consumers with Care	Cambridge Economic Opportunity Committee, Inc	11 Inman Street, Cambridge MA 02139	$40,000 00	10/12/2017	Cambridge Economic Opportunity Committee will leverage partnerships with local community organizations, staff tables at cultural festivals, community fairs, faith-based organizations, and housing developments, disseminate flyers, door hangers, and utilize social media, provide education on the payment system through the Health Connector; provide post-enrollment assistance by educating about choosing a plan, making appointments, how to read medical bills, and questioning charges, and offer financial coaching in light of addressing premium payments
Connecting Consumers with Care	Brockton Neighborhood Health Center	63 Main Street, Brockton MA 02301	$40,000 00	10/12/2017	Brockton Neighborhood Health Center will partner with community organizations, help patients update account information, make payments and understand communications from the MassHealth and the Connector; reach out to patients via phone or mail to ensure they understand changes and take steps to maintain coverage, and work closely with patients through individual education and coaching to address post-enrollment issues like selecting a health plan, choosing a primary care provider, and making payments online
Connecting Consumers with Care	County of Dukes County	114 New York Avenue, Oak Bluffs, West Tisbury MA 02575	$40,000 00	10/12/2017	County of Dukes County will develop outreach materials describing MassHealth and the Health Connector programs using health insurance literacy guidelines, use paid and unpaid advertising, social media, and the website to promote affordable insurance information, partner with local Navigators and Certified Assistance Counselors, and state and local agencies to advertise, support, and assist with plan changes during Open Enrollment, educate consumers on how to set-up accounts, submit applications, select plans, and pay premiums online, with a focus on estimating seasonal and self employed income, and engage in advocacy efforts, providing feedback to state agencies with concerns about system issues that create barriers to coverage for eligible consumers
Fostering Effective Integration	Lynn Community Health Center	269 Union Street, Lynn MA 01901	$150,000.00	12/11/2017	LCHC has developed and implemented a fully integrated primary care and behavioral health program with co location of services, co-management of patients by the medical and behavioral health providers through a shared care model, and utilization of shared electronic medical records through a newly-implemented Epic system The Foundation has supported the development, growth and improvement of this very strong behavioral health integration program, with continued funding for the health center's response to the substance abuse epidemic in Lynn Building upon the learning and successes of its foundational behavioral health integration model, LCHC has developed an integrated primary care/mental health/addictions team of professionals who specialize in addictions and mental health disorders The team also utilizes medication to treat addictions, including Suboxone, with plans to add Vivitrol LCHC will expand this multi-disciplinary team by adding a psychiatrist, therapists, primary care providers, and nursing staff to serve approximately 800 patients

BCBSMA Foundation For Expanding Healthcare Access

[illegible]	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Fostering Effective Integration	Brookline Community Mental Health Center	41 Garrison Road, Brookline MA 02445	$150,000 00	12/11/2017	BCMHC's Healthy Lives program, created in 2011, is designed to increase primary care and behavioral health access for patients with co-occurring serious mental illness and multiple chronic conditions The patient-centered model leverages intensive care management strategies to improve access, integrates care, and helps reduce barriers to treatment for patients with complex needs. In addition to operating a community-based care management model – including home visits, and individual and group counseling – the program introduces self-care and wellness activities for patients to become increasingly more engaged in their own health Healthy Lives, which received Foundation grant funding in 2015, serves low-income seriously mentally ill adults living in Brookline, Roxbury, Brighton, Allston, and most recently Dorchester and Mattapan, with at least two chronic medical conditions (such as diabetes, cardiovascular disease or COPD) Work to date has shown that Healthy Lives significantly improves health outcomes and reduces avoidable ED visits for participants The goal is to serve 250 to 300 patients over three years
Fostering Effective Integration	Vinfen Corporation	950 Cambridge Street, Cambridge MA 02141	$175,000 00	12/11/2017	Vinfen has developed Community-Based Health Homes (CBHH) for individuals with serious mental illness to integrate their primary care and behavioral health and address the disparities experienced by the population The CBHH model achieves close collaboration approaching an integrated practice by embedding Nurse Practitioners (NPs), Nurses (RNs) and Health Outreach Workers (HOWs) into existing community-based rehabilitation and recovery behavioral health teams, bringing primary care services directly to individuals with serious mental illness in their communities since 2012 Over the past three years, Vinfen has been actively evaluating and piloting health technologies in an effort to integrate behavioral and primary health care for its population The Foundation-supported expansion program embeds two HOWs and the use of a smartphone app specifically designed to support the population into a dispersed, community-based outreach team A dedicated Program Coordinator will manage the program, collect data and evaluate impact
Fostering Effective Integration	East Boston Neighborhood Health Center	10 Gove Street, East Boston MA 02128	$175,000 00	12/11/2017	With support from the Foundation, EBNHC will focus on expanding behavioral health services for children and adolescents (ages 5 to 21) who are seen in Pediatrics, Family Medicine and the health center's School-Based Health Center In 2014, the Pediatric and Family Medicine Departments served a total of 15,498 patients up to age 21, and the number of child and adolescent patients served continues to increase EBNHC's two newly hired child/adolescent psychiatrists will be able to fully treat and manage, and track and measure, the care of children and adolescents with mild to moderately severe depression and anxiety disorder, and integrate this care with a range of medical conditions EBNHC has historically only been able to refer pediatric patients with behavioral health issues to community providers where there are challenges associated with long wait times due to psychiatric provider shortages, as well as geographic and linguistic barriers Expanding on-site psychiatric capacity also will help to facilitate care planning for patients following psychiatric hospital discharge
Fostering Effective Integration	Lahey Health Behavioral Services	41 Mall Road, Burlington MA 01805	$150,000 00	12/11/2017	Since 2012, Lahey Health Division of Primary Care and Lahey Health Behavioral Services have collaborated to embed behavioral health clinicians in five community primary care practices, sharing medical records, and using the Collaborative Care Model (CCM), a team decision-making model of care Through this grant, Lahey Health Behavioral Services proposes a multi faceted, multi-site expansion of its integrated CCM approach, by adding two community primary care practices (Gloucester and Beverly), introducing CCM in one Lahey Health System obstetrics practice, establishing CCM in one Lahey Health System pediatrics practice, piloting reverse integration at the Lahey Health Behavioral Services community mental health center in Salem, and expanding screenings of primary care patients across all of these sites to identify higher-risk patients and track outcomes Lahey Health Behavioral Services will also use tele psychiatry to enable consulting psychiatrists to serve more patients, particularly for more rural, isolated sites, such as Gloucester, where there is a lack of access to specialty services
Fostering Effective Integration	Pediatric Physicians' Organization at Children's Hospital	77 Pond Avenue, Suite 205C, Brookline MA 02445	$150,000 00	12/11/2017	The PPOC launched its Behavioral Health Integration program in 2012 and now has 41 practices participating. The focus of this initiative is to provide substance abuse prevention and treatment services to adolescents and young adults (up to age 25) and their families at PPOC practices in Lowell and Wareham This funding will help expand PPOC's effort to help practices with high-risk populations detect, treat, and manage substance abuse issues, and make referrals to community-based substance abuse care when needed The expansion will enhance the learning community curriculum to offer five additional hours of training on substance use, and ensure that the collaborative behavioral health integration teams have an embedded integration and clinical support specialist with substance abuse expertise via the PPOC's partnership with the Adolescent Substance Abuse Program (ASAP) at Boson Children's Hospital

BCBSMA Foundation For Expanding Healthcare Access

Full Grant Focus Area	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Fostering Effective Integration	Hebrew SeniorLife, Inc	1200 Centre Street, Boston MA 02131	$175,000 00	12/11/2017	HSL has developed a depression services program, Making Real Progress in Emotional Health, to integrate behavioral health treatment with primary care and other health services to reduce the severity of depressive symptoms in seniors, and to improve overall health The Foundation's grant will enable HSL to expand services to patients receiving in home care In 2015, HSL acquired Jewish Family and Children's Services, which expanded HSL's home care services by an additional 1,000 seniors (now totaling 2,000 older adults) In contrast to seniors in supportive housing who tend to be part of a community, seniors in home care are more likely to suffer from isolation, pain, and increased debility post-hospitalization These stressors also increase these seniors' susceptibility to depression HSL will take the lead in developing and monitoring individual care plans, tracking health outcomes in collaboration with primary care physicians from the practices treating the majority of patients, and developing additional community partnerships to ensure more comprehensive collaborative care for their patients
Fostering Effective Integration	Community Health Center of Cape Cod, Inc	107 Commercial Street, Mashpee MA 02649	$125,000 00	12/26/2017	With Foundation grant funding in 2015, CHC of Cape Cod used a combination of national best practices and center-designed strategies to develop a risk stratification tool to identify high-risk patients with significant behavioral and medical health co-morbidities, uncontrolled chronic diseases, a history of frequent hospitalization, and a history of frequent ED visits in order to implement a more comprehensive and effective model of integration The risk stratification tool has enabled the health center to create a high-risk registry that is fully operational and key to helping the center to achieve full integration With this three-year grant, CHC of Cape Cod will focus on patients who have screened for one or more behavioral health conditions, with the goal of improving access to ongoing behavioral health services for at least 1,000 patients who may benefit from an integrated care approach The health center will expand complex care management and quality improvement staff, and increase family involvement with care
Social Equity and Health	Partners for a Healthier Community	127 State Street, 4th Floor, Springfield MA 01103	$50,000 00	12/11/2017	Public Health Institute of Western Massachusetts (PHIWM) provides research and assessment, coalition-building and facilitation, and program and health policy development, with the goal of strengthening social needs, housing and health equity, specifically for low income neighborhoods and communities of color PHIWM will work with the region's social and behavioral health service sectors to understand their needs and implement capacity-building strategies to respond to anticipated Accountable Care Organization patient referrals and clinical linkage programs Social service, housing, and behavioral health leaders seek PHIWM's support in understanding how they can create partnerships that will enable social determinants of health to be addressed in health care settings
Social Equity and Health	Citizens' Housing and Planning Association	18 Tremont Street, Suite 401, Boston MA 02108	$50,000 00	12/11/2017	Citizens' Housing and Planning Association (CHAPA) is the leading statewide housing policy and research organization in Massachusetts, and manages the On Solid Ground (OSG) Coalition, which includes organizations in housing, health, education, employment, legal services, and faith-based communities advocating for increased housing and economic stability for families, thereby improving housing, education, income and health outcomes. CHAPA will conduct outreach and education to affect policy and systemic change at the intersection of health and housing
Social Equity and Health	The Boston Foundation	75 Arlington Street, 3rd floor Boston MA 02116	$100,000 00	12/11/2017	The Health Starts at Home Initiative supports four partnerships that bring together housing and health care organizations to support work that demonstrates the positive effects of stable, affordable housing to children's health outcomes, identify promising new and existing models for collaboration that can be brought to scale, decrease health care costs, and decrease costs related to homelessness Families eligible for participation have children under the age of 12, and are experiencing housing instability The evaluation partners for Health Starts at Home, Health Resources in Action and the Urban Institute, are conducting both outcome and process evaluations to measure whether and how improved housing stability affects the health of children, as well as to document successes and challenges, and develop best practices for creating these types of health care and housing partnerships
Social Equity and Health	Massachusetts Public Health Association	14 Beacon St , Suite 706, Boston MA 02108	$50,000 00	12/11/2017	Massachusetts Public Health Association is implementing the campaign phase of its Alliance for Community Health Integration (ACHI), a collaboration among state and local leaders in public health and consumer advocacy focused on ensuring that the social determinants of health are intentionally identified and addressed in Massachusetts health care transformation Priorities include maximizing the impact of social determinants of health on new MassHealth ACO models by ensuring availability of training and technical assistance for partners, and promoting data transparency on health-related social needs, interventions, and outcomes, advocating for changes in community benefits to strengthen alignment of hospital investments with community needs and social determinants of health, and engaging hospitals, health centers, and insurers to utilize their political clout to advance legislation that addresses social determinants of health

BCBSMA Foundation For Expanding Healthcare Access

Full Proposal Award Type	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Social Equity and Health	The Community Builders	95 Berkeley Street, Boston MA 02116	$50,000 00	12/11/2017	The Community Builders (TCB) is a nonprofit real estate developer and owner, with a mission of building and sustaining strong communities where people of all incomes can achieve their full potential The organization develops housing for families and seniors, invests in local businesses and public amenities that strengthen neighborhoods, and constructs or preserves hundreds of affordable and mixed-income housing developments TCB will commission Health Resources in Action to develop and conduct an evaluation for its Community Life program, specifically for low-income residents housed in the New Franklin Homes development in Dorchester Community Life is a program that addresses important social determinants of health like housing stability, early childhood education, access to healthy food, and economic stability to improve the health of residents Residents facce a multitude of chronic health issues, including high blood pressure and diabetes, and over half of residents report not managing their conditions The process will enable TCB to develop clear metrics and evidence-based strategies to improve health outcomes among its residents
Social Equity and Health	Conference of Boston Teaching Hospitals	11 Beacon Street, Suite 710, Boston MA 02108	$25,000.00	3/9/2017	Funding to to engage a consultant/organization to develop and facilitate a planning process that will establish the CHNA and CHIP Collaborative in preparation for COBTH to conduct a single CHNA and develop a joint CHIP for all of Boston in partnership with the Boston Public Health Commission and other key community stakeholders in 2019
Policy & Research	Tufts Medical Center, Inc	800 Washington Street, Boston MA 02111	$50,000 00	6/22/2017	Funding to support research exploring the influence and impact of health care organizations' movement into social determinants of health, and social service delivery more specifically, on Community Based Organizations (CBOs) in Massachusetts.
Special Initiatives	Brookline Community Mental Health Center	41 Garrison Road, Brookline MA 02445	$25,000 00	10/23/2017	Brookline Community Mental Health Center will develop a small-scale pilot of a functional user community that allows care providers to share resources, pose questions, and sustain dialogue across systems The Brookline Center will build and coordinate the network by creating the user group, recruiting members, monitoring and administering the group, and collecting and analyzing data
Special Initiatives	Health Care For All	One Federal Street, 5th Flr , Boston MA 02110	$25,000 00	10/12/2017	Health Care For All will launch an ethnic media campaign during the 2017 Open Enrollment period, utilizing radio and print advertisements, outreach strategies, and other communication avenues to engage hard-to-reach individuals in cities with high rates of uninsured individuals across the state
Special Initiatives	Massachusetts League of Community Health Centers	40 Court Street, 10th Fl , Boston MA 02108	$25,000 00	11/3/2017	Massachusetts League of Community Health Centers (the League) will operate a newly-developed training and learning center in Worcester The new, centrally-located facility will enable the League to enhance and expand learning initiatives for members, staff, board members, and partner organizations
Special Initiatives	The Massachusetts Health Policy Forum	415 South Street, MS035, Waltham MA 02454-9110	$10,000 00	11/2/2017	Funding to support the 2018 Princeton Conference
Special Initiatives	Massachusetts Senior Action Council	108 Myrtle St,	$25,000 00	12/19/2017	Massachusetts Senior Action Council will continue to develop its capacity as an advocacy organization for seniors, in addition to its strong position as a community organizing entity
Special Initiatives	Community Care Cooperative	1 Federal Street, Boston MA 02110	$50,000 00	10/12/2017	Community Care Cooperative (C3) will create a peer to peer learning model through which community health centers (CHCs) can participate in, and contribute to, the development of best practices for CHCs operating within an accountable care organization environment C3 will coordinate the learning sessions and use participant feedback to ensure their utility to CHCs.
Special Initiatives	Roxbury Presbyterian Church Social Impact Center	328 Warren Street, Roxbury MA 02119	$40,000 00	10/12/2017	Roxbury Presbyterian Church Social Impact Center will expand the free counseling, case management, and referral capacity of the Cory Johnson Program for Post-Traumatic Healing The Corey Johnson Program serves children, youth, adults, and families suffering from untreated post-traumatic stress resulting from urban violence, poverty, and racism
Special Initiatives	University of Massachusetts Medical School, Center for Integrated Primary Care	55 Lake Avenue North, Worcester MA 01655	$50,000 00	6/22/2017	University of Massachusetts Medical School Center for Integrated Primary Care will develop an engagement and education curriculum for patients with opioid use disorder (OUD) and their families The curriculum, which will be available online and through smartphone devices, will aim to provide information about OUD treatment options and promote better primary care
Special Initiatives	Talking Information Center	130 Enterprise Drive, Marshfield MA 02050	$5,000.00	6/29/2017	The Talking Information Center (TIC) will develop a radio program to broadcast events focused on health and vocational training for individuals with disabilities TIC provides free broadcasting of local news, articles, consumer information, and other items of interest to visually impaired and otherwise disabled individuals across the state
Special Initiatives	Community Servings Inc	18 Marbury Terrace, Jamaica Plain MA 02130	$50,000.00	10/12/2017	Community Servings will develop a Massachusetts Food is Medicine (FIM) State Plan to analyze the current landscape of interventions and provide recommendations to policymakers, providers, insurers, and community organizations to improve access to medically-balanced meals
Special Initiatives 5	Community Catalyst	One Federal Street, Boston MA 02110	$25,000.00	12/19/2017	The Center for Consumer Engagement in Health Innovation will provide a training and technical assistance fellowship to a cohort of advocates and consumer support leaders whose organizations are engaged in behavioral health and LTSS issues on quality measurement and advocacy

BCBSMA Foundation For Expanding Healthcare Access

[illegible]	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Special Initiatives	Advocates Inc	1881 Worcester Road, Framingham MA 01701	$50 000 00	10/12/2017	Advocates, Inc will lead a newly created coalition aiming to improve access to behavioral health and social services by creating a single point of entry for consumers, providers, schools, and families seeking services. Other organizations joining Advocates in this initiative include Spectrum Health Systems, South Middlesex Opportunity Council, and Wayside Youth & Family Support Network
Strengthening the Voice for Access	Massachusetts League of Community Health Centers	40 Court Street, 10th Fl , Boston MA 02108	$60,000 00	10/12/2017	The Massachusetts League of Community Health Centers (the League) will serve as a source of accurate and timely information related to health care coverage issues The League will conduct policy analyses regarding state and federal issues and disseminates their learnings to policymakers, state agencies, member organizations, and other advocacy groups Additional priorities will include increasing the League's capacity for grassroots advocacy work and improving health literacy among patients at community health centers
Strengthening the Voice for Access	Massachusetts Association for Community Health Workers/Health Resources in Action	2 Boylston Street, 4th Floor, Boston MA 02116	$60,000 00	10/12/2017	Massachusetts Association for Community Health Workers (MACHW) will focus on professionalizing the community health worker (CHW) workforce by advocating for statewide standardization of practices, the development of a certification process, and the promulgation of a code of ethics Additionally, MACHW will work to increase CHW participation in medical decision making and encourage delivery organizations to raise CHWs' wages They will also develop metrics capturing the impact of CHWs on social determinants of health, for consideration by MassHealth
Strengthening the Voice for Access	Health Law Advocates	One Federal Street, Boston MA 02110	$65,000 00	10/12/2017	Health Law Advocates (HLA) will focus on improving health care access for vulnerable populations by providing direct legal services and advocating to state policymakers Their direct legal service work will inform community outreach efforts, education programs, policy analyses, and legislative proposals In their advocacy work, HLA will pay particular attention to children with disabilities, immigrants, and transgender individuals, and to issues related to behavioral health care access Additionally, they will defend MassHealth members against federal Medicaid changes and ensure access to services for ACO-enrolled MassHealth members.
Strengthening the Voice for Access	Health Care For All	One Federal Street, 5th Flr , Boston MA 02110	$75,000 00	10/12/2017	Health Care For All (HCFA) will work to protect and expand affordable, accessible health care within Massachusetts by advocating for the continuation and improvement of state and federal health and safety net policies As a leader of the Oral Health Advocacy Task Force and the Affordable Care Today (ACTII) Coalition, HCFA will educate policymakers about health care access issues and will engage in community organizing, coalition-building initiatives, and media outreach Additionally, they will seek to identify under-resourced but effective mental health programs that may benefit from expansion
Strengthening the Voice for Access	Massachusetts Law Reform Institute, Inc	40 Court Street, Suite 800, Boston MA 02108	$75,000 00	10/12/2017	Massachusetts Law Reform Institute (MLRI) will provide legal expertise to coalitions and organizations that maintain and improve health care coverage for low-income Massachusetts residents. MLRI will conduct policy research and analyses to help Massachusetts-based and national partners understand how federal regulations may impact coverage Additionally, MLRI will advocate for ways to reduce churn among MassHealth beneficiaries and will work to ensure that MassHealth members know their rights as consumers
Strengthening the Voice for Access	Massachusetts Immigrant and Refugee Advocacy Coalition	105 Chauncy Street, Suite 901, Boston MA 02111	$65,000 00	10/12/2017	Massachusetts Immigrant and Refugee Advocacy (MIRA) will work to defend and expand funding and access to health coverage for immigrant and refugee populations in Massachusetts In addition to advocacy regarding state-level policies, MIRA will work with national partners to expand health access to all immigrants To this end, MIRA aims to initiate a long term campaign in partnership with the National Immigration Law Center They will also work with additional coalition partners to end restrictions to coverage for DACA grantees
Strengthening the Voice for Access	Massachusetts Organization for Addiction Recovery	29 Winter Street, Floor 2, Boston MA 02108	$60,000 00	10/12/2017	The Massachusetts Organization for Addiction Recovery (MOAR) will work to reduce stigma against addiction and to increase behavioral health care access and integration Their efforts will center on increasing access to timely treatment to reduce overdose risk, as well as access to long term treatment, advocating on behalf of populations disproportionately affected by addiction, and integrating peer support services into mainstream care MOAR will conduct community organizing and outreach, participate in coalitions, and expand peer-oriented educational programs.
Strengthening the Voice for Access	National Alliance on Mental Illness	The Schrafft's Center, 529 Main Street, Suite1M17, Boston, MA 02129	$60,000 00	10/12/2017	The National Alliance on Mental Illness Massachusetts (NAMI Mass) will work to improve access to mental health services and to reduce stigma regarding mental health conditions Priorities include restoring state funding and reimbursement for behavioral health services and improving commercial coverage of emergency services. Additionally, NAMI Mass will work on creating a statewide mental health training program for law enforcement To achieve these goals, NAMI Mass will conduct policy analyses, organize local chapters and peer support program members, and participate in coalitions and stakeholder alliances
Strengthening the Voice for Access	Massachusetts Public Health Association	14 Beacon St , Suite 706, Boston MA 02108	$30,000.00	10/12/2017	Massachusetts Public Health Association (MPHA) will focus on community health integration and improving the built environment MPHA will work with the Alliance for Community Health Integration to ensure that social determinants of health are adequately addressed, in particular through community investments, support for ACOs from MassHealth, and health care institutions' internal policies

BCBSMA Foundation For Expanding Healthcare Access

Full Proposal Record Type	Recipient Name	Organization Address	Amount Awarded	Award Date	Purpose of Grant
Strengthening the Voice for Access	Massachusetts Association for Mental Health, Inc	50 Federal Street, 6th Floor, Boston MA 02110	$75,000 00	10/12/2017	The Massachusetts Association for Mental Health (MAMH) will work to improve access to behavioral health services and health-related social services for individuals with behavioral health conditions MAMH will analyze policies and evidence-based programs related to health, including supportive housing subsidies and criminal justice reform, and will disseminate their findings through reports and through their activities as a convener and coalition leader MAMH will also work to expand their capacity for data collection, measurement, and reporting.
Strengthening the Voice for Access	Boston Center for Independent Living	60 Temple Place, 5th Floor, Boston MA 02111	$60,000 00	10/12/2017	Boston Center for Independent Living (BCIL) will represent the interests of individuals with disabilities to policymakers and health care delivery system leaders. BCIL will work to ensure the availability of funds for accessible medical equipment, the continuation of funding for One Care plans, and the stability of MassHealth's partnership with community based organizations. BCIL will partner with other organizations in representing the disability community to accountable care organizations Additionally, BCIL will continue its involvement with the Disability Advocates Advancing our Healthcare Rights (DAAHR) Coalition, focusing on social determinants of health
Strengthening the Voice for Access	Disability Policy Consortium	11 Dartmouth Street, Suite 301 Malden MA 02148	$60,000 00	10/12/2017	Disability Policy Consortium (DPC) will connect disability advocacy communities across the state and amplify the voices of these groups in conversations with state and federal policymakers In so doing, DPC seeks to re-frame disability as a social rather than medical condition and to shift the focus within disability-related health care from payment to ethics DPC will serve as a hub for cross-disability advocacy through community-based participatory action research, their co-leadership of DAAHR, and an expanded social media presence

Total Amount Awarded
$3,487,407 00