

Form **990-PF****Return of Private Foundation**

OMB No 1545-0047

Department of the Treasury
Internal Revenue Service

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

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning

, 2019, 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)

Room/suite

B Telephone number (see instructions)

101 HUNTINGTON AVENUE, SUITE 1300

(617) 246-5000

City or town, state or province, country, and ZIP or foreign postal code

BOSTON, MA 02199-7611

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeH Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at

J Accounting method ☐ Cash ☒ Accrual

end of year (from Part II, col (c), line

☐ Other (specify)

16) ▶ \$ 105,157,775.

(Part I, column (d), must be on cash basis)

C If exemption application is pending, check here. ☐D 1 Foreign organizations, check here. ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here. ☐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))

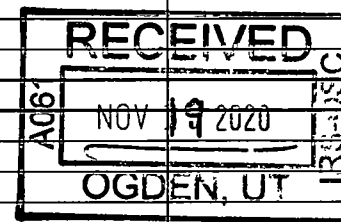
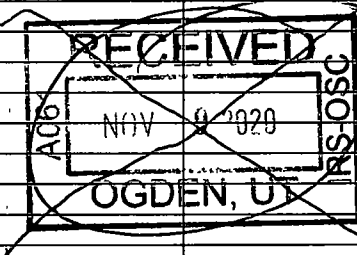
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	1,442,566.			
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	1,333,753.	1,333,753.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	5,717,794.			
b Gross sales price for all assets on line 6a	18,972,926.			
7 Capital gain net income (from Part IV, line 2)		5,717,794.		
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) <u>ATCH 1</u>	10,057,518.			
12 Total. Add lines 1 through 11	18,551,631.	7,051,547.		
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) [2].	348,243.			
19 Depreciation (attach schedule) and depletion				
20 Occupancy	116,902.			116,902.
21 Travel, conferences, and meetings	234,311.			234,311.
22 Printing and publications	6,936.			6,936.
23 Other expenses (attach schedule) <u>ATCH 3</u>	3,478,431.			3,478,431.
24 Total operating and administrative expenses. Add lines 13 through 23.	4,184,823.			3,836,580.
25 Contributions, gifts, grants paid	3,807,430.			3,807,430.
26 Total expenses and disbursements. Add lines 24 and 25	7,992,253.			7,644,010.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	10,559,378.			
b Net investment income (if negative, enter -0-)		7,051,547.		
c Adjusted net income (if negative, enter -0-)				



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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	563,550.	850,094.		
	2 Savings and temporary cash investments				
	3 Accounts receivable ▶ 38,553.				
	Less allowance for doubtful accounts ▶	25,909.	38,553.		
	4 Pledges receivable ▶				
	Less allowance for doubtful accounts ▶				
	5 Grants receivable.	115,250.	87,173.		
	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)				
	Liabilities	11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
12 Investments - mortgage loans.					
13 Investments - other (attach schedule) ATCH 4		78,068,721.	78,379,429.	105,157,775.	
14 Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶					
15 Other assets (describe ▶ ATCH 5)		16,720,830.			
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		95,494,260.	79,355,249.	105,157,775.	
17 Accounts payable and accrued expenses		51,059.	86,958.		
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 6)	885,711.	929,769.			
23 Total liabilities (add lines 17 through 22)	936,770.	1,016,727.			
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ☒ X and complete lines 24, 25, 29, and 30.				
	24 Net assets without donor restrictions	94,557,490.	105,116,868.		
	25 Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ☐ and complete lines 26 through 30				
	26 Capital stock, trust principal, or current funds				
	27 Paid-in or capital surplus, or land, bldg., and equipment fund.				
	28 Retained earnings, accumulated income, endowment, or other funds . .				
	29 Total net assets or fund balances (see instructions)	94,557,490.	105,116,868.		
	30 Total liabilities and net assets/fund balances (see instructions)	95,494,260.	106,133,595.		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	94,557,490.
2 Enter amount from Part I, line 27a	2	10,559,378.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	105,116,868.
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 29	6	105,116,868.

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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**

5,717,794.

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))
2018	7,584,808.	104,839,092.	0.072347
2017	7,422,396.	77,015,222.	0.096376
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

2 Total of line 1, column (d)**2**

0.469935

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by
the number of years the foundation has been in existence if less than 5 years**3**

0.093987

4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5**4**

101,794,651.

5 Multiply line 4 by line 3.**5**

9,567,374.

6 Enter 1% of net investment income (1% of Part I, line 27b).**6**

70,515.

7 Add lines 5 and 6.**7**

9,637,889.

8 Enter qualifying distributions from Part XII, line 4.**8**

7,644,010.

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 ☐ and enter 1% of Part I, line 27b	1	141,031.
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	141,031.
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	141,031.
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	5,242.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	150,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	155,242.
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	14,211.
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ▶ 14,211. 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 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		X
c Did the foundation file Form 1120-POL for this year?		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 ▶ \$ _____		X
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		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		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?	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	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 <i>General Instruction G</i> ? If "No," attach explanation	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 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		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		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.		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► BCBSMAFOUNDATION.ORG	X	
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		
16 At any time during calendar year 2019, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ►		X

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 Organizations relying on a current notice regarding disaster assistance, check here ► ☐	1b	X
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 2019?	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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ 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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019)	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 2019?	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.		
Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐	5b	
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?		
If "Yes" to 6b, file Form 8870	6b	X
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?		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	☐ Yes	☒ No
	7b	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and 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 7		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. ▶

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 8		891,141.

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 ▶	

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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	103,344,823.
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	103,344,823.
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	103,344,823.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,550,172.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	101,794,651.
6	Minimum investment return. Enter 5% of line 5	6	5,089,733.

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	5,089,733.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	141,031.
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	141,031.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	4,948,702.
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4	5	4,948,702.
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	4,948,702.

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	7,644,010.
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	7,644,010.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	7,644,010.

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				4,948,702.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.				
b Total for prior years 20 <u>17</u> , 20 <u>16</u> , 20 <u>15</u>				
3 Excess distributions carryover, if any, to 2019				
a From 2014 3,774,127.				
b From 2015 4,572,468.				
c From 2016 4,298,743.				
d From 2017 3,732,685.				
e From 2018 2,441,391.				
f Total of lines 3a through e	18,819,414.			
4 Qualifying distributions for 2019 from Part XII, line 4 ► \$ <u>7,644,010.</u>				
a Applied to 2018, 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 2019 distributable amount.				4,948,702.
e Remaining amount distributed out of corpus.	2,695,308.			
5 Excess distributions carryover applied to 2019 (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	21,514,722.			
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 2018 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020.				
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 2014 not applied on line 5 or line 7 (see instructions)	3,774,127.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	17,740,595.			
10 Analysis of line 9				
a Excess from 2015 4,572,468.				
b Excess from 2016 4,298,743.				
c Excess from 2017 3,732,685.				
d Excess from 2018 2,441,391.				
e Excess from 2019 2,695,308.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

NOT APPLICABLE

- | | | | | | | | | | |
|--|----------|---------------|----------|----------|--|--------------------------|-------------------------------------|--|--|
| 1 If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, 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) | | |
| 2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | Tax year | Prior 3 years | | | | (e) Total | | | |
| | (a) 2019 | (b) 2018 | (c) 2017 | (d) 2016 | | | | | |
| 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 8 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 9 | |
| b The form in which applications should be submitted and information and materials they should include

 | |
| c Any submission deadlines

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

 | |

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 <i>Paid during the year</i> SEE ATTACHMENT 16			SEE ATTACHMENT 16	3,807,430.
Total ▶ 3a				3,807,430.
b <i>Approved for future payment</i>				
Total ▶ 3b				

Enter gross amounts unless otherwise indicated

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 10						1,442,566.
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	1,333,753.		
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	5,717,794.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory . .						
11 Other revenue a						
b ATCH 11						10,057,518.
c						
d						
e						
12 Subtotal. Add columns (b), (d), and (e)				7,051,547.		11,500,084.
13 Total. Add line 12, columns (b), (d), and (e)					13	18,551,631.

(See worksheet in line 13 instructions to verify calculations)

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)
▼	

[illegible]

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 | | |

[illegible]

- 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? ☒ Yes ☐ No
- b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
ATCH 12		

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.

**Sign
Here**

▶ AUDREY SHELTO

11/15/2020

PRESIDENT

Signature of Officer or trustee
Audrey Shello (Nov 10 2020 17:24 EST)

Date	Title
Nov 10, 2020	President

May the IRS discuss this return with the preparer shown below?

See instructions ☐ Yes ☒ 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

Form **990-PF** (2019)

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

Kind of Property		Description				P r o p e r t y	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)	
18972926.		REALIZED GAIN OR LOSS 13255132.					5,717,794.	
TOTAL GAIN (LOSS)							<u>5,717,794.</u>	

Schedule of Contributors

OMB No 1545-0047

2019

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

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
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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	2019 HEALTH COVERAGE FELLOWSHIP - MAINE 150 CAPITOL ST SUITE 4 AUGUSTA, ME 04330	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	ROBERT WOOD JOHNSON FOUNDATION 50 COLLEGE ROAD EAST PRINCETON, NJ 08543-2316	\$ 42,500.	Person ☐ 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	\$ 182,166.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
4	NATIONAL INSTITUTE FOR HEALTHCARE MGT 1225 19TH STREET NW STE 710 WASHINGTON, DC 20036	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
5	BCBS OF CA FOUNDATION HC FELLOWSHIP 50 BEALE STREET 14TH FLOOR SAN FRANCISCO, CA 94105	\$ 38,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
6	BLUE CROSS BLUE SHIELD OF MASACHUSETTS 101 HUNTINGTON AVENUE SUITE 1300 BOSTON, MA 02199-7611	\$ 987,000.	Person ☐ 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
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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	BOWER FOUNDATION GRANT - HC FELLOWSHIP 578 HIGHLAND COLONY PARKWAY SUITE 120 RIDGELAND, MS 39157	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
8	BOWER FOUNDATION GRANT - HC FELLOWSHIP 578 HIGHLAND COLONY PARKWAY SUITE 120 RIDGELAND, MS 39157	\$ 25,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
9	ENDOWMENT FOR HEALTH 2020 HEALTH COVERAG ONE PILLSBURY STREET, SUITE 301 CONCORD, NH 03301	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
10	CT HEALTH FOUNDATION - 2018 100 PEARL STREET HARTFORD, CT 06103	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
11	ST. DAVID'S FOUNDATION 1303 SAN ANTONIO STREET, SUITE 500 SAN ANTONIO, TX 78701	\$ 5,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
12	EPISCOPAL HEALTH FOUNDATION 500 FANNIN ST. SUITE 300 HOUSTON, TX 77002	\$ 5,000.	Person ☐ 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
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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
13	MEADOWS MENTAL HEALTH POLICY - 2019 HEAL 1303 SAN ANTONIO STREET, SUITE 810 SAN ANTONIO, TX 78701	\$ 5,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
14	METHODIST HEALTHCARE MINSITRIES OF TX - 4507 MEDICAL DRIVE, SAN ANTONIO SAN ANTONIO, TX 78229	\$ 5,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
15	THE KRESGE FOUNDATION 2019 HC 3215 W. BIG BEAVER RD TROY, MI 48084	\$ 19,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
16	AIM CATALYST FUND CONTRIBUTION 8600 WEST BRYN MAWR - SUITE 800S CHICAGO, IL 60631	\$ 5,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
17	TIVITY HEALTH - CATALYST FUND CONTRIBUTI 701 COOL SPRINGS BOULEVARD FRANKLIN, TX 37067	\$ 5,000.	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
18	THE KRESGE FOUNDATION 2020 HC 3215 W. BIG BEAVER RD TROY, MI 48084	\$ 19,000.	Person ☐ 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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

ATTACHMENT 1FORM 990PF, PART I - OTHER INCOME

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
UNREALIZED GAIN OR LOSS ON INVESTMENTS	<u>10,057,518.</u>
TOTALS	<u>10,057,518.</u>

ATTACHMENT 2FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
TAX ON INVESTMENT INCOME	348,243.
TOTALS	<u>348,243.</u>

ATTACHMENT 3

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
POSTAGE AND TELEPHONE	6,968.	6,968.
EXTERNAL PROFESSIONAL SERVICES	1,679,939.	1,679,939.
PURCHASED SERVICES FROM BCBS	1,785,828.	1,785,828.
MISCELLANEOUS EXPENSES	5,696.	5,696.
TOTALS	<u>3,478,431.</u>	<u>3,478,431.</u>

FORM 990PF, PART II - OTHER INVESTMENTSATTACHMENT 4

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
ACCESS CAPITAL COMM INV FUND	5,517,725.	5,203,781.
PUTNAM TOTAL RETURN FUND	2,967,062.	5,370,970.
PIMCO ALL ASSET FUND	5,139,925.	5,257,815.
SSGA S&P 500 TOBACCO FREE FUND	8,751,331.	25,760,168.
SANDERSON TOBACCO FREE IN FUND	8,273,273.	16,124,948.
PIMCO TOTAL RETURN FUND	16,078,654.	15,273,471.
IRONBRIDGE SM CAP LIFE CY FUND	7,280,152.	6,583,627.
CF DV DYNAMIC GROWTH FUND	4,355,706.	5,541,703.
SCHRODER EM MKT M/S BND-R6	5,069,096.	5,059,763.
SEGALL BRYANT & HAMILL INTL SM	5,200,000.	4,599,848.
SSGA US TIPS INDEX STRATEGY	3,600,248.	3,953,938.
SCHRODER EMERG MKT EQ FD-SDR	6,146,257.	6,427,743.
TOTALS	<u>78,379,429.</u>	<u>105,157,775.</u>

ATTACHMENT 5

FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
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FEDERAL EXCISE TAX RECOVERABLE		
OTHER LOSS - MARKET TO MARKET		
REALIZED GAIN ON INVESTMENTS		
OTHER INC - MARKET TO MARKET		

TOTALS

ATTACHMENT 6FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>
DUE TO AFFILIATE BLUE CROSS AN	339,034.
FEDERAL INCOME TAXES ON INVEST	372,220.
FEDERAL INCOME TAX LIABILITY	218,515.
TOTALS	<u>929,769.</u>

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

ATTACHMENT 7

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
SEE ATTACHMENT

GRAND TOTALS

0. 0. 0.

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALSATTACHMENT 8

<u>NAME AND ADDRESS</u>	<u>TYPE OF SERVICE</u>	<u>COMPENSATION</u>
MANATT, PHELPS & PHILLIPS LLP 7 TIMES SQUARE NEW YORK, NY 10036 PROFESSIONAL LEGAL AND CONSULTING SERVICES	CONSULTING	409,683.
TYE, LAWRENCE S 139A FAYERWAEATHER STREET CAMBRIDGE, MA 02138 PROFESSIONAL CONSULTING SERVICES	CONSULTING	132,135.
BAILIT HEALTH PURCHASING LLC 56 PICKERING NEEDHAM, MA 02492 PROFESSIONAL CONSULTING SERVICES	CONSULTING	141,463.
URBAN INSTITUTE 500 L'ENFANT PLAZA SW WASHINGTON, DC 20024 PROFESSIONAL CONSULTING SERVICES	CONSULTING	134,490.
UNIVERSITY OF MASSACHUSETTS MEDICAL SCHO 55 LAKE AVE NORTH WORCESTER MA 01655 NORTH WORCESTER, MA 01655 PROFESSIONAL CONSULTING SERVICES	CONSULTING	73,370.
TOTAL COMPENSATION		<u>891,141.</u>

ATTACHMENT 9FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

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

FORM IN WHICH APPLICATION SHOULD BE SUBMITTED AND INFORMATION THEY
SHOULD INCLUDE:

A TWO PAGE LETTER OF INQUIRY CAN BE SUBMITTED TO AUDREY SHELTO

SUBMISSION DEADLINES:

N/A

RESTRICTIONS OR LIMITATIONS ON AWARDS:

N/A

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

ATTACHMENT 10

<u>DESCRIPTION</u>	BUSINESS CODE	<u>AMOUNT</u>	EXCLUSION CODE	<u>AMOUNT</u>	RELATED OR EXEMPT FUNCTION INCOME
CONTRIBUTIONS, GIFTS, AND GRANTS					1,442,566.
TOTALS					<u>1,442,566.</u>

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

ATTACHMENT 11

<u>DESCRIPTION</u>	<u>BUSINESS CODE</u>	<u>AMOUNT</u>	<u>EXCLUSION CODE</u>	<u>AMOUNT</u>	<u>RELATED OR EXEMPT FUNCTION INCOME</u>
UNREALIZED GAIN OR LOSS ON INVESTMENTS			14		10,057,518.
TOTALS					<u>10,057,518.</u>

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Catalyst Fund	Berkshire Immigrant Center	67 East St., Pittsfield, MA 01201	\$5,000.00	1/25/2019	Funding to purchase a new client database management system
Catalyst Fund	Tapestry Health	296 Nonotuck Street, 2nd Fl., Florence, MA 01062	\$3,850.00	1/25/2019	Funding to hire a consultant for Medicare credentialing services
Catalyst Fund	Sahel, Inc	11 Bedford St., Burlington, MA 01803	\$3,750.00	3/6/2019	Funding to support the creation of outreach materials in the three languages of Bengali, Nepali and Arabic
Catalyst Fund	The Urban Farming Institute of Boston, Inc	487R Norfolk Street, Mattapan, MA 02126	\$5,000.00	3/6/2019	Funding to purchase updated technology equipment, including a server, wireless sound system and speakers
Catalyst Fund	Prevent Blindness America	424 Beacon Street, Boston, MA 02115	\$3,703.00	4/5/2019	Funding to translate and print childhood vision information leaflets
Catalyst Fund	Respond, Inc	PO Box 555, Somerville, MA 02143	\$5,000.00	4/5/2019	Funding to purchase a new terminal server with significant storage space
Catalyst Fund	THRIVE Communities of Massachusetts	175 Cabot Street Suite 100 (E for All) Lowell, MA 01854	\$5,000.00	4/5/2019	Funding to hire a consultant to conduct a strategic planning process
Catalyst Fund	Boston Arts Academy Foundation	45 Temple Place, 4th Floor, Boston, MA 02111	\$5,000.00	5/1/2019	Funding to hire a consultant to institute an evaluation process and assessment tool for its Health and Wellness Program
Catalyst Fund	Harvard Street Neighborhood Health Center	632 Blue Hill Avenue, Dorchester, MA 02121	\$5,000.00	5/1/2019	Funding to redesign its website
Catalyst Fund	Advocates, Inc	1881 Worcester Road, Framingham, MA 01701	\$4,465.00	5/24/2019	Funding to purchase equipment and supplies to outfit four sensory rooms at the organization's Autism Day Services program in Ashland
Catalyst Fund	City of Gloucester	9 Dale Avenue, Gloucester, MA 01930	\$4,998.00	5/24/2019	Funding to purchase digital sensor x-ray equipment for diagnostic testing
Catalyst Fund	Drug Story Theater, Inc	675 Summer St., Marshfield, MA 02050	\$5,000.00	5/24/2019	Funding to purchase student response survey handsets with remotes
Catalyst Fund	Waltham Boys & Girls Club	20 Exchange St., Waltham, MA 01970	\$5,000.00	5/24/2019	Funding to hire a professional development consultant to implement a year-round staff training plan focused on the topics of emotional wellness, mental health, and substance abuse issues as they affect youth
Catalyst Fund	Codman Square Health Center	637 Washington Street, Dorchester, MA 02124	\$2,500.00	7/9/2019	Funding to purchase a mammography chair for the Radiology
Catalyst Fund	Enroot, Inc	99 Bishop Richard Allen DR, Cambridge, MA 02139	\$5,000.00	7/9/2019	Funding to hire a grants consultant
Catalyst Fund	Shooting Touch	65 Sprague St., East Building, 2nd Floor Boston, Massachusetts 02136-2061	\$4,560.00	7/9/2019	Funding to purchase Donor Management and fundraising software
Catalyst Fund	Regional Environmental Council, Inc	9 Castle St., Apt 1, Worcester, MA 01610	\$5,000.00	7/9/2019	Funding to hire a strategic planning consultant
Catalyst Fund	Boston Area Rape Crisis Center	99 Bishop Allen DR, Cambridge, MA 02139	\$5,000.00	10/2/2019	Funding to translate the organization's website and client intake/release forms into Spanish
Catalyst Fund	Carroll Center for the Blind, Inc	770 Centre Street, Newton, MA 02458	\$5,000.00	10/2/2019	Funding to hire a consultant to develop marketing and outreach strategy
Catalyst Fund	Edward M. Kennedy Health Center	650 Lincoln Street, Worcester, MA 01605	\$3,199.00	10/2/2019	Funding to purchase an ultrasound probe for prenatal clinics
Catalyst Fund	Hospitality Homes	1018 Beacon St., Brookline, MA 02446	\$5,000.00	10/2/2019	Funding to hire a consultant to implement a website re-design
Catalyst Fund	New England Homes for the Deaf	154 Water St., Danvers, MA 01923	\$4,875.00	10/2/2019	Funding to hire a grant writer to implement a comprehensive grants administration program
Catalyst Fund	Stanley Street Treatment & Resources, Inc	386 Stanley St., Fall River, MA 02720	\$5,000.00	10/2/2019	Funding to hire a consultant to set up an Immunization Interface to monitor vaccines
Catalyst Fund	Enhance Asian Community on Health, Inc	1 Franklin Street, Unit 1207, Boston, MA 02110	\$4,400.00	10/21/2019	Funding for a Prevention and Wellness program, purchasing medical equipment, hosting community meetings, producing marketing materials and making technology enhancements
Catalyst Fund	Foundation for Home Health, Inc	75 Kneeland Street, Ste 709, BOSTON, Massachusetts 02111	\$5,000.00	10/21/2019	Funding to convene a symposium on Long Term Support Services including recording a video, the compilation, printing, and distribution of a final report to disseminate across Massachusetts

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Catalyst Fund	Cycle Kids	955 Massachusetts Ave Suite 322, Cambridge, MA 02139	\$5,000 00	12/9/2019	Funding to hire consultants to improve their website to facilitate a new Donor Recruitment and Retention Strategy
Catalyst Fund	Massachusetts Science Center Corporation	400 West Cummings Park, Suite 1725-128, Woburn, MA 01801	\$5,000 00	12/9/2019	Funding for a one-year pilot wellness program for 50 students in grades 2-6 at Boston area urban schools
Catalyst Fund	Spina Bida Association of Greater New England	219 E Main Street, Suite 100B, Milford, MA 01757	\$5,000 00	12/9/2019	Funding to develop and print outreach materials and translate into Spanish and Portuguese
Catalyst Fund	Virginia Thurston Healing Garden Cancer Support Center	145 Bolton Road, Harvard, MA 01451	\$5,000 00	12/9/2019	Funding to hire a grant writing consultant
Catalyst Fund	Lynn Shelter Association	100 Willow St., Lynn, MA 01901	\$5,000 00	12/20/2019	Funding to conduct an elder needs assessment on the needs of older homeless clients in order to design and implement responsive programs
Catalyst Fund	The Arc of the South Shore	20 Pond Park Rd., Hingham, MA 02043	\$4,330 00	12/20/2019	Funding to purchase exercise equipment for a fitness program
Catalyst Fund	The Children's Room	1210 Massachusetts Ave, Arlington, MA 02476	\$5,000 00	12/20/2019	Funding to hire a consultant to analyze data on the impact of its work
Catalyst Fund	Jewish Family Service of Western Massachusetts	15 Lenox St., Springfield, MA 01108	\$5,000 00	5/1/2019	Funding to hire a consultant to help the organization obtain licensure with the Massachusetts Department of Public Health to become a Behavioral Health Clinic
Catalyst Fund	Visiting Dental Hygiene, Inc	4 Keith Way #3, Hingham, Massachusetts 02043	\$5,000 00	12/20/2019	Funding to purchase dental hygiene equipment and technology to expand outreach to patients with limited access to preventive dental
Catalyst Fund	West End House Girls Camp, Inc	105 Alliston St., Alliston, MA 02134	\$5,000 00	5/1/2019	Funding to hire a grantwriting consultant
Community Resource Database Initiative/Network of Care	Massachusetts Association for Mental Health, Inc	50 Federal Street, 6th Floor, Boston, MA 02110	\$122,800 00	1/24/2019	Funding to implement Through a contract with Trilogy Integrated Resources, the design and delivery of a functional Network of Care website for Massachusetts that includes modules on behavioral health, children and families, and social services
Connecting Consumers with Care	The Joint Committee for Children's Health Care in Everett	484 Broadway Room 2, Everett, MA 02149	\$45,000 00	10/8/2019	To assist clients, many from immigrant, multilingual, and multicultural backgrounds, to access, maintain and navigate health insurance coverage options as well as how to access health services
Connecting Consumers with Care	Greater New Bedford Community Health Center	874 Purchase Street, New Bedford, MA 02740	\$45,000 00	10/8/2019	To serve a community with a high rate of uninsurance by providing screening, education, enrollment, and post-enrollment services for patients and community residents, including information on how to maintain insurance coverage
Connecting Consumers with Care	Lowell Community Health Center	161 Jackson Street, Lowell, MA 01852	\$45,000 00	10/8/2019	To serve a community with a high rate of uninsurance by strengthening services to engage and enroll clients in health insurance and educate staff and community-based agencies about the health care system to increase understanding and trust, especially among refugee and immigrant populations
Connecting Consumers with Care	The Dimock Center	55 Dimock St., Roxbury, Massachusetts 02119	\$45,000 00	10/8/2019	To support patients in its substance use disorder residential programs to educate them about health insurance coverage and connect them with financial counselors at the health center to enroll and sustain their coverage
Connecting Consumers with Care	Edward M. Kennedy Community Health Center	650 Lincoln Street, Worcester, MA 01605	\$45,000 00	10/8/2019	To enhance partnerships with community organizations for outreach and enrollment services and to increase visibility in the community where the most vulnerable clients are likely to congregate. ENK also proactively provides clients with the tools they need to prevent lapses in coverage and supports them through the re-determination process
Connecting Consumers with Care	Caring Health Center	1049 Main Street, Room 118, Springfield, MA 01103	\$45,000 00	10/8/2019	To serve a community with a high rate of uninsurance, providing culturally competent insurance enrollment assistance and education to patients, increasing health insurance literacy through culturally and linguistically appropriate education and community outreach
Connecting Consumers with Care	Boston Health Care for the Homeless Program	780 Albany St., Boston, MA 02118	\$40,000 00	10/8/2019	To bridge gaps in care for homeless immigrant and non-English speaking patients by enhancing and expanding outreach and health insurance enrollment services at key locations, including shelter sites. It will also include enrollment services on its outreach van in East Boston, which serves primarily immigrant and uninsured patients

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Connecting Consumers with Care	East Boston Neighborhood Health Center	10 Gove St, East Boston, MA 02128	\$45,000 00	10/8/2019	To conduct outreach in partnership with local community organizations, participate in community events, proactively assist self-pay patients in applying for coverage, and promote enrollment services through social media and in clinical areas of the health center. It will also cross-train call center staff to provide appropriate health insurance information (pre-and-post enrollment) and support to patients.
Connecting Consumers with Care	Family Health Center of Worcester, Inc	26 Queen St, Worcester, Massachusetts 01610	\$45,000 00	10/8/2019	To focus insurance outreach and enrollment efforts towards refugee, immigrant, and asylee populations through targeted clinics and community events with an emphasis on dispelling misinformation, myths, and fears related to public charge and to proactively outreach to patients who are newly uninsured as a result of a change in life circumstances.
Connecting Consumers with Care	Ecu-Health Care, Inc	99 Hospital Ave Suite 208, North Adams, MA 01247	\$45,000 00	10/8/2019	To support clients in accessing and maintaining health insurance coverage through one-on-one education and outreach in partnership with local community organizations.
Connecting Consumers with Care	Boston Public Health Commission	1010 Massachusetts Avenue, Boston, MA 02118	\$45,000 00	10/8/2019	To strengthen and grow its impact and presence in communities with the highest rates of uninsured by scaling up successful outreach and enrollment strategies, sharing information about open enrollment and plan selection periods, and assisting clients in applying for and maintaining health insurance coverage.
Connecting Consumers with Care	Community Action Committee of Cape Cod & Islands	372 North St, Hyannis, MA 02601	\$45,000 00	10/8/2019	To serve a community with a limited number of insurance plans and available providers by providing education and ongoing support to consumers as they navigate the health care system and access services, working to ensure that consumers enroll in and maintain coverage.
Connecting Consumers with Care	Cambridge Economic Opportunity Committee, Inc	11 Inman Street, Cambridge, MA 02139	\$45,000 00	10/8/2019	To serve several communities with high rates of uninsured residents by working to reduce barriers to obtaining insurance enrollment assistance and assisting clients in maintaining coverage and navigating care.
Connecting Consumers with Care	Brockton Neighborhood Health Center	63 Main Street, Brockton, MA 02301	\$45,000 00	10/8/2019	To serve a community with one of the state's highest number of uninsured residents by partnering with local organizations to expand its reach to specific population, working to assist consumers in enrolling in coverage and working with them post-enrollment to ensure that they maintain coverage and have access to care.
Expanding Access to BH Urgent Care	Bay Cove Human Services, Inc	66 Canal Street, Boston, MA 02114	\$200,000 00	12/18/2019	Bay Cove Human Services seeks a grant to enable its Cape Cod Emergency Services Program (CESP) to expand behavioral health urgent care services, encompassing mental health conditions, substance use disorders (SUD), and co-occurring disorders, to difficult to reach and isolated areas of Cape Cod. The focus of the program is to increase outreach efforts to support individuals with urgent/emerging crises before they become emergencies.
Expanding Access to BH Urgent Care	The Brien Center for Mental Health and Substance Abuse Services	P O Box 4219, Pittsfield, MA 01201	\$200,000 00	12/18/2019	Brien Center seeks a grant to increase community-based locations with behavioral health urgent care (BHUC) and expand their operating hours, including 24/7/365 staff for BHUC. Brien Center BHUC program will continue to serve as a bridge between an individual's emergency services assessment and the connection with outpatient services. Brien Center uses solution-focused therapy, cognitive processing therapy, brief motivational interviewing, or interim check-in via telephone or in-person, to support clients until they've connected with the appropriate outpatient providers.

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Expanding Access to BH Urgent Care	Community Healthlink, Inc	72 Jaques Avenue, Worcester, MA 01610	\$200,000.00	12/18/2019	Community Healthlink (CHL) in Worcester is one of only three Massachusetts Department of Public Health/Bureau of Substance and Addiction Services licensed Behavioral Health Urgent Care Centers. Community Healthlink will continue the integration of its substance use disorder program with its mental health services. Over the next year, the program will focus on implementing its medication-assisted treatment program for both long and short term use, providing case management and follow-up services with clients who come to the Behavioral Health and Addiction Urgent Care (BHAUC) for either mental health or SUD treatment, and continuing to strengthen its collaboration with local police departments and health and human services providers.
Expanding Access to BH Urgent Care	Boston Medical Center	One Boston Medical Center Place, Boston, MA 02118	\$200,000.00	12/18/2019	Boston Medical Center seeks a grant to enhance the Boston Emergency Services Team (BEST) model to improve the delivery of high-quality, culturally competent care to individuals with mental health conditions, substance use disorders (SUD), and co-occurring disorders. It seeks to strengthen the rapid assessment and treatment of individuals while providing referrals and access to appropriate services in the least restrictive environment, promoting safety and recovery, and providing medical support and triage to divert people from the emergency department and inpatient psychiatric units.
Expanding Access to BH Urgent Care	Clinical and Support Options, Inc	8 Atwood Drive Suite 301, Northampton, MA 01060	\$200,000.00	12/18/2019	Clinical & Support Options, Inc (CSO) operates an Emergency Services Program (ESP) in Hampden, Hampshire and Franklin counties. Clinical and Support Options (CSO) will increase its ability to provide an integrated behavioral health system that determines, assigns and begins the right service at the time needed for each person, increase prescriber hours, enhance addiction services, continue to improve the Greenfield Living Room peer support diversion program, and grow partnerships with community organizations, state human services agencies, and police departments.
Expanding Access to BH Urgent Care	Northeast Behavioral Health Corporation D/B/A Lahey Health Behavioral Services	41 Mall Road, Lahey Health Philanthropy Office, Burlington, MA 01805	\$200,000.00	12/18/2019	Lahey Health Behavioral Services (LHBS) Emergency Services Program provides rapid assessment and immediate stabilization services to people in need in the greater Lowell area. The grant will help to enhance their urgent care clinic by introducing telemedicine for real-time psychiatric prescribing, using community health workers to assist clients following an emergent or urgent evaluation, and developing an integrated HER to improve crisis treatment and follow-up planning.
Going Beyond Health Care 2018	Metro Housing Boston	1411 Tremont Street, Boston, MA 02120-3401	\$75,000.00	12/18/2019	In partnership with Boston Medical Center, to serve patient families who face imminent homelessness, eviction, foreclosure, or have an impending housing court date. Families referred by the hospital's Pediatric Emergency Department, Obstetrics Clinic, Newborn Nursery, and the Domestic Violence Program are provided with complex stabilization services. In addition to supporting clients, the grant partners are developing infrastructure for sustainable and efficient data sharing across the two organizations.

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Going Beyond Health Care 2018	Project Bread- The Walk for Hunger	145 Border Street, East Boston, MA 02128	\$75,000 00	12/18/2019	In partnership with the Family Health Center of Worcester and the Regional Environmental Council, to address food insecurity to increase the consumption of healthy foods among the patients of Family Health Center of Worcester. The organizations are formalizing a referral system for patients of the health center who screen positive for food insecurity to connect them to available resources in the community that will contribute to sustainable nutrition solutions. This includes its partner the Regional Environmental Council, which enables access to affordable, local produce through its farm-to-table and mobile market .
Going Beyond Health Care 2018	The Community Builders	185 Dartmouth Street, Boston, MA 02116	\$75,000 00	12/18/2019	In partnership with the Family Health Center of Worcester, Worcester Addresses Childhood Trauma (Worcester ACT), Clark University, and Boston College, to work to understand and document the connections between trauma and housing instability and integrating trauma-informed services, supports and property management protocols to assist residents in maintaining housing stability.
Nick Littlefield Award	Children's Advocacy Center of Bristol County A Program of JRI	58 Arch Street, Fall River, MA 02724	\$50,000 00	7/10/2019	Funding to support a new position of Child Sexual Abuse Prevention Specialist for two years, which will use research from the Adverse Childhood Experiences (ACEs) studies to develop online training modules and webinars for local child-serving professionals.
Policy and Research	Boston Center for Independent Living	60 Temple Place, 5th Floor, Boston, MA 02111	\$25,000 00	12/10/2019	Funding for Boston Center for Independent Living to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.
Policy and Research	Massachusetts Organization for Addiction Recovery (MOAR)	105 Chauncy Street, Sixth Floor, Boston, MA 02111	\$25,000 00	12/10/2019	Funding for MOAR to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.
Policy and Research	Health Law Advocates	ONE Federal St, Boston, MA 02110	\$25,000 00	12/10/2019	Funding for Health Law Advocates (HLA) to develop an educational issue brief that identifies current health reform related court cases and/or legal challenges that have particular focus on or implications for coverage and consumer protections. The issue brief will identify the issues and topics current court case(s) raise, describe the current status of these challenges and process for moving forward through legal channels, and highlight potential implications for MA if/when applicable, informed largely by review of relevant amicus briefs.
Policy and Research	Massachusetts Immigrant and Refugee Advocacy Coalition	105 Chauncy Street, Suite 901, Boston, MA 02111	\$25,000 00	12/10/2019	Funding for MIRA to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.
Policy and Research	Health Care For All	ONE Federal St, Boston, MA 02110	\$25,000 00	12/10/2019	Funding for HCFA to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Policy and Research	Health Care For All	ONE Federal St, Boston, MA 02110	\$5,000 00	4/11/2019	The goal of this grant is for Health Care for All to identify a small number of MassHealth members (approximately 3-4 individuals) who can be further vetted to select a subject (or subjects) for one or more additional profiles for the qualitative component of BCBSMA Foundation Faces of MassHealth report who will add racial and/or ethnic diversity to the group of profile subjects already featured in a draft of the Faces of MassHealth report.
Policy and Research	National Alliance on Mental Illness	529 Main St #1M17, Boston, MA 02129	\$25,000 00	12/10/2019	Funding for National Alliance on Mental Illness to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.
Policy and Research	Massachusetts Senior Action Council	108 Myrtle St, Quincy, MA 02171	\$25,000 00	12/10/2019	Funding for Massachusetts Senior Action Council to develop two one-page journalistic profiles of MassHealth members that the BCBSMA Foundation can include in relevant policy and research products. The goal is for these members' stories to help readers of BCBSMA Foundation reports understand why MassHealth matters and how it affects the lives of real people.
Policy and Research	Health Leads, Inc	PO Box 961630 Boston, MA 02196	\$25,000 00	7/10/2019	Funding to support costs associated with a full day learning symposium in September 2019 that will convene MassHealth Accountable Care Organizations and their Social Service Organization partners for a day of learning and preparation for implementation of the MassHealth Flex Services program.
Special Initiatives	Boston Association for Childbirth Education	P O Box 29Newtonville MA 02460	\$25,000 00	12/19/2019	Boston Association for Childbirth Education will increase the number of doulas that come from Communities of Color to meet the linguistic, racial and cultural needs of families in key target areas. Communities of focus will include Fall River, New Bedford, Brockton, Taunton, Lawrence/Lowell, Haverhill, Worcester/Framingham, it will also provide training and mentoring of new doulas.
Special Initiatives	Powers Music School	395 Concord Ave, Belmont, MA 02478	\$12,000 00	12/19/2019	Powers Music School will replicate the key elements of the Watch City Singers program, an innovative and successful cross-sector music program which addresses the harmful effects of isolation and loneliness on older adults through weekly rehearsals that combine progressive skill-building content with social engagement activities. The program will focus on low-income, diverse communities with an emphasis on communities of color, utilizing appropriate capacity building activities, with an eye towards longer-term sustainability.
Special Initiatives	Beth Israel Deaconess Medical Center	330 Brookline Ave (OV), Boston, MA 02115	\$50,000 00	12/18/2019	Beth Israel Lahey Health will build the capacity of health center care teams to be spiritual care generalists in order to promote spiritual wellness in their patients, families and staff. Spiritual care generalist refers to a provider who attends to patients' self-reported religious or spiritual needs as they pertain to their health and identifies those in need of the specialty care that chaplains can provide.

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Special Initiatives	Community Catalyst	ONE Federal St, Boston, MA 02110	\$100,000.00	4/30/2019	Robert (Rob) Restuccia was a health advocate, well-regarded leader in national and local health policy, and one of the key architects of the broad coalition that successfully passed state and federal health reform. Rob was one of the longest serving board members of the Blue Cross Blue Shield of Massachusetts Foundation, having served since the Foundation was established in 2001. The Restuccia Leadership Fund will be established to advance Rob's vision for a vital and cohesive health care advocacy movement. Contributions to the Restuccia Leadership Fund will be used to build and launch a legacy program in Rob's honor. In keeping with Rob's lifelong commitment, the program, which will be based in Massachusetts, will focus on strengthening health care advocacy organizations around the country and will address the deep inequities in the health care system.
Special Initiatives	Institute for Community Health	350 Main St, Malden, MA 02148	\$28,000.00	12/18/2019	Institute for Community Health (ICH) will evaluate BCBSMA Foundation's Special Initiatives grant program. The Foundation will partner with ICH to evaluate the Special Initiatives program in order to understand the impact of past grants and make data-informed decisions about the program moving forward.
Special Initiatives	Heywood Hospital	242 Green St, Gardner, MA 01440	\$50,000.00	5/1/2019	Heywood Hospital will expand their school-based tele-behavioral health counseling program to include families of the students who are currently participating in the program for family therapy through student-family counseling sessions. This expansion will require parent education and engagement, program coordination by a Community Health Worker (CHW) and therapy sessions conducted by a Behavioral Health Therapist (BHT) dedicated to the Narragansett School District. The funding will primarily be used to support the services delivered by the CHW and the BHT to implement the family therapy phase of this program.
Special Initiatives	Community Catalyst	One Federal Street, 5th Flr, Boston, MA 02110	\$50,000.00	10/8/2019	Community Catalyst will create a quality measurement train-the-trainer curriculum and a glossary for consumer leaders and consumer advocates across Massachusetts. Consumers face significant access issues for substance use treatment and recovery services as well as substantial variability in the quality of services available. Community Catalyst and other advocates support that stronger consumer advocacy is needed to improve the measurement of and subsequent quality of services.
Special Initiatives	Beth Israel Lahey Health Inc	330 Brookline Ave (OV), Boston, MA 02215	\$50,000.00	10/8/2019	Beth Israel Lahey Health Behavioral Services (BILH BS) will enhance current community-based alcohol use disorder (AUD) treatment by providing a tool that rewards participation in recovery activities. The project will make use of the DynamicCare Health mobile application (https://www.dynamiccarehealth.com), a digital platform that helps people monitor and change their use of drugs, opioids, alcohol, and tobacco.
Special Initiatives	The Family Van	1542 Tremont St, CROSSING, MA 02120	\$50,000.00	10/8/2019	The Family Van will test how an innovative approach used to increase access to mental health care internationally (Problem Management Plus) can be adapted domestically. Healthy Roads will increase access to mental health services in low-income communities and build the capacity of Community Health Workers (CHW) to address mental health issues.
Special Initiatives	The Massachusetts Health Policy Forum	417 South Street, Waltham MA 02454	\$10,000.00	12/10/2019	Funding to support the 2020 Princeton Conference

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Special Initiatives	The Arc of Massachusetts	217 South St, Waltham, MA 02453	\$25,000 00	6/6/2019	The Arc of Massachusetts (The Arc) seeks to enhance the lives of people with intellectual and developmental disabilities (I/DD), including autism, and their families. They provide advocacy for community supports and services that foster social inclusion, self-determination, and equity. The organization represents the interests of more than 200,000 children and adults, and operates eighteen chapters in local communities throughout the state. The Arc requests funding to expand the Operation House Call (OHC) program, which provides future health care providers with instruction and exposure to individuals with autism and I/DD, as well as their parents and caregivers.
Special Initiatives	Massachusetts Association for Mental Health, Inc	50 Federal St, Boston, MA 02110	\$50,000 00	6/6/2019	The Massachusetts Association for Mental Health (MAMH) will conduct an environmental scan in Massachusetts and produce recommendations to improve the availability of trauma-informed policies and practices and expand access to trauma-informed programs serving adults and seniors in community settings. The scan will identify strengths, gaps, and opportunities for improvements across service delivery systems. Funds will be used to conduct focus groups, key informant interviews, project management led by the Director of Knowledge Management and Technical Assistance, and to hold a half-day forum to present the findings to state agencies, service providers, policymakers and other stakeholders.
Special Initiatives Strengthening the Voice for Access	Massachusetts Organization for Addiction Recovery (MOAR)	105 Chauncy Street, Sixth Floor, Boston, MA 02111	\$60,000 00	10/8/2019	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	Massachusetts Association for Mental Health, Inc	50 Federal Street, 6th Floor, Boston, MA 02110	\$75,000 00	10/8/2019	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	Massachusetts League of Community Health Centers	40 Court Street, 10th Fl, Boston, MA 02108	\$60,000 00	10/8/2019	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 disseminate 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.

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Strengthening the Voice for Access	Massachusetts Law Reform Institute, Inc	40 Court Street, Suite 800, Boston, MA 02108	\$75,000 00	10/8/2019	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 Public Health Association	14 Beacon St., Suite 706, Boston, MA 02108	\$60,000 00	10/8/2019	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.
Strengthening the Voice for Access	Health Law Advocates	One Federal Street, Boston, MA 02110	\$65,000 00	10/8/2019	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	10/8/2019	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 (ACT!) 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 Immigrant and Refugee Advocacy Coalition	105 Chauncy Street, Suite 901, Boston, MA 02111	\$65,000 00	10/8/2019	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	Disability Policy Consortium	11 Dartmouth Street, Suite 301, Malden, MA 02148	\$60,000 00	10/8/2019	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.

Grant Area	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Strengthening the Voice for Access	Boston Center for Independent Living	60 Temple Place, 5th Floor, Boston, MA 02111	\$60,000.00	10/8/2019	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	Massachusetts Senior Action Council	108 Myrtle St, Quincy, MA 02171	\$60,000.00	10/8/2019	Mass Senior Action Council (MSAC) is a member-led organization and is the only organization in Massachusetts that informs, engages, and empowers low-income seniors from diverse communities to have direct input in shaping the Commonwealth's health policy decisions. Through its structure and programs, diverse communities of lower-income seniors will be empowered with information, skills, and organizational capacity to have a strong voice on key healthcare and other public policy issues that affect their lives. As organizational and community leaders MSAC members will be involved at every level, from identifying critical issues to developing leadership teams that drive strategic planning and the campaigns to address them.
Total Amount Awarded			\$3,807,430.00		

ATTACHMENT 12FORM 990PF, PART XVII, LINE 2B - INFORMATION REGARDING TRANSFERS

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