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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.

1912

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation		A Employer identification number
THE HERSHEY FAMILY FOUNDATION ROPES & GRAY LLP/CCASEY		34-1574366
Number and street (or P O box number if mail is not delivered to street address) 800 BOYLSTON STREET	Room/suite 3600	B Telephone number 617 951 7918
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02199-3600		C If exemption application is pending, check here ▶ ☐

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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

04

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) ▶$ 82,540,711.

J Accounting method: [X] Cash ☐ 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))

	Line	Description	(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	2,463,919.			
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	177,440.	177,440.		
	4	Dividends and interest from securities	1,888,459.	1,888,459.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	211,188.			
	b	Gross sales price for all assets on line 6a 15,155,948.				
	7	Capital gain net income (from Part IV, line 2)		211,188.		
	8	Net short-term capital gain			N/A	
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income				
	12	**Total** Add lines 1 through 11	4,741,006.	2,277,087.	0.	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees STMT 1	6,409.	6,409.	0.	0.
	b	Accounting fees STMT 2	21,525.	10,763.	0.	10,762.
	c	Other professional fees STMT 3	31,011.	31,011.	0.	0.
	17	Interest				
	18	Taxes STMT 4	105,540.	15,540.	0.	0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	164,485.	63,723.	0.	10,762.
	25	Contributions, gifts, grants paid	5,710,116.			5,710,116.
	26	**Total expenses and disbursements** Add lines 24 and 25	5,874,601.	63,723.	0.	5,720,878.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-1,133,595.			
	b	**Net investment income** (if negative, enter -0-)		2,213,364.		
	c	**Adjusted net income** (if negative, enter -0-)			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	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	6,492,759.	13,320,692.	13,320,692.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 5	32,962,169.	26,909,655.	62,796,860.
	c Investments - corporate bonds STMT 6	7,651,339.	6,313,135.	6,423,159.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	47,106,267.	46,543,482.	82,540,711.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ [X] and complete lines 26 through 30			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	47,106,267.	46,543,482.	
	29 Total net assets or fund balances	47,106,267.	46,543,482.	
	30 Total liabilities and net assets/fund balances	47,106,267.	46,543,482.	

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	47,106,267.
2	Enter amount from Part I, line 27a	2	-1,133,595.
3	Other increases not included in line 2 (itemize) ▶ TIMING DIFFERENCES - GRANTS (2019)	3	675,810.
4	Add lines 1, 2, and 3	4	46,648,482.
5	Decreases not included in line 2 (itemize) ▶ TIMING DIFFERENCES - GRANTS (2018)	5	105,000.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	46,543,482.

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.)
1a	US TRUST #1676 SHORT TERM SALES	P	01/01/19	12/31/19
b	US TRUST #1676 LONG TERM SALES	P	01/01/18	12/31/19
c	US TRUST #6247 LONG TERM SALES	P	01/01/18	12/31/19
d	VANGUARD #0675 SHORT TERM SALES	P	01/01/19	12/31/19
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	50,000.		49,553.	447.
b	2,952,952.		2,955,140.	-2,188.
c	2,550,375.		2,350,344.	200,031.
d	9,602,621.		9,589,723.	12,898.
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				447.
b				-2,188.
c				200,031.
d				12,898.
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** 211,188.

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) If (loss), enter -0- in Part I, line 8 **3** 13,345.

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	5,849,168.	75,119,580.	.077865
2017	4,407,074.	74,422,668.	.059217
2016	4,965,322.	70,929,357.	.070004
2015	4,968,372.	76,782,576.	.064707
2014	4,516,570.	75,880,153.	.059522

2	**Total** of line 1, column (d)	2	.331315
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	.066263
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	75,016,284.
5	Multiply line 4 by line 3	5	4,970,804.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	22,134.
7	Add lines 5 and 6	7	4,992,938.
8	Enter qualifying distributions from Part XII, line 4	8	5,720,878.

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	22,134.
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	0.
3 Add lines 1 and 2			3	22,134.
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	22,134.
6 Credits/Payments:				
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	27,319.		
b Exempt foreign organizations - tax withheld at source	6b	0.		
c Tax paid with application for extension of time to file (Form 8868)	6c	50,000.		
d Backup withholding erroneously withheld	6d	0.		
7 Total credits and payments. Add lines 6a through 6d			7	77,319.
8 Enter any **penalty** for underpayment of estimated tax. Check here [ ] if Form 2220 is attached			8	0.
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	55,185.
11 Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶		55,185. **Refunded** ▶	11	0.

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 ▶ $ 0. (2) On foundation managers ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
If "Yes," attach a detailed description of the activities			
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? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
If "Yes," attach the statement required by *General Instruction T*			
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. ▶ MA			
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 2019 or the tax year beginning in 2019? 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

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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 ▶ N/A

14 The books are in care of ▶ BARRY J. HERSHEY Telephone no ▶ 617-951-7918

Located at ▶ ROPES & GRAY 800 BOYLSTON ST, STE 3600, BOSTON, M ZIP+4 ▶ 02199

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 N/A

			Yes	No
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?	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 N/A	1b		
	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 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) N/A	2b		
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.) N/A	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

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 [X] 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 [X] No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	[ ] Yes [X] No			
(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? See instructions	[ ] Yes [X] 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 [X] 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	N/A	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? N/A	[ ] 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 [X] 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 [X] No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		
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 [X] No			

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.

(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
BARRY J. HERSHEY Ropes & Gray LLP/CCasey 800 Boylston Street, Suite 3600 BOSTON, MA 02199-3600	TRUSTEE 0.10	0.	0.	0.
CONNIE HERSHEY Ropes & Gray LLP/CCasey 800 Boylston Street, Suite 3600 BOSTON, MA 02199-3600	TRUSTEE 0.10	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

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 N/A	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	0.
2	
All other program-related investments See instructions. 3 NONE	0.
Total. Add lines 1 through 3 ▶	0.

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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	67,219,440.
b	Average of monthly cash balances	1b	8,939,224.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	76,158,664.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	76,158,664.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,142,380.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	75,016,284.
6	**Minimum investment return** Enter 5% of line 5	6	3,750,814.

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	3,750,814.
2a	Tax on investment income for 2019 from Part VI, line 5 2a 22,134.		
b	Income tax for 2019. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	22,134.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,728,680.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,728,680.
6	Deduction from distributable amount (see instructions)	6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	3,728,680.

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	5,720,878.
b	Program-related investments - total from Part IX-B	1b	0.
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	5,720,878.
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	5	22,134.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	5,698,744.

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				3,728,680.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014 — 758,166.				
b From 2015 — 1,164,839.				
c From 2016 — 1,644,160.				
d From 2017 — 721,259.				
e From 2018 — 2,277,765.				
f **Total** of lines 3a through e	6,566,189.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 5,720,878.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				3,728,680.
e Remaining amount distributed out of corpus	1,992,198.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	8,558,387.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				0.
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)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	758,166.			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	7,800,221.			
10 Analysis of line 9:				
a Excess from 2015 — 1,164,839.				
b Excess from 2016 — 1,644,160.				
c Excess from 2017 — 721,259.				
d Excess from 2018 — 2,277,765.				
e Excess from 2019 — 1,992,198.				

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

1 a 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)

	Tax year	Prior 3 years			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
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					
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))

BARRY J. HERSHEY

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

NONE

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

Check here ▶ [X] 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.

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

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 Paid during the year				
ALTRUISM IN MEDICINE INSTITUTE 101 S CEDAR ST CORTEZ, CO 81321	NONE	PC	THE MISSION OF THE ALTRUISM MEDICINE INSTITUTE IS TO PROMOTE AND SUPPORT RIGOROUS,	25,000.
AMERICAN REPERTORY THEATRE 64 BRATTLE ST CAMBRIDGE, MA 02138	NONE	PC	FUNDING HELPS EXPAND THE BOUNDARIES OF THEATRE, PRODUCTION, PERFORMING, AND PRESENTING LITERARY	75,000.
BIDMC 330 BROOKLINE AVE BOSTON, MA 02215	NONE	PC	BETH ISRAEL DEACONESS MEDICAL CENTER SERVES PATIENTS COMPASSIONATELY AND EFFECTIVELY, AND	250,000.
BROWN UNIVERSITY 38 GEORGE STREET PROVIDENCE, RI 02912	NONE	PC	FUNDING FOR BROWN UNIVERSITY TO EDUCATE STUDENTS.	35,000.
CENTER FOR CONTEMPLATIVE MIND IN SOCIETY 296 NONOTUCK STREET SUITE 5 FLORENCE, MA 01062	NONE	PC	THE CENTER FOR CONTEMPLATIVE MIND IN SOCIETY TRANSFORMS HIGHER EDUCATION BY SUPPORTING AND	30,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	5,710,116.
b Approved for future payment NONE				
Total			▶ 3b	0.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
CONCORD FREE PUBLIC LIBRARY CORPORATION 129 MAIN ST CONCORD, MA 01742	NONE	PC	TO OWN AND MAINTAIN PUBLIC LIBRARY BUILDINGS IN CONCORD, MASSACHUSETTS; OWN AND MAINTAIN SPECIAL COLLECTIONS OF THE CONCORD FREE PUBLIC LIBRARY; MISCELLANEOUS OTHER SUPPORT SERVICES FOR THE CONCORD FREE PUBLIC LIBRARY	50,000.
DALAI LAMA CTR FOR ETHICS & TRANSFORMATIVE VALUES 77 MASSACHUSETTS AVE CAMBRIDGE, MA 02139	NONE	PC	DEDICATED TO INQUIRY, DIALOGUE, AND EDUCATION ON THE ETHICAL AND HUMANE DIMENSIONS OF LIFE. AS A COLLABORATIVE AND NONPARTISAN THINK TANK, THE CENTER FOCUSES ON THE DEVELOPMENT OF INTERDISCIPLINARY RESEARCH AND PROGRAMS IN VARIED FIELDS OF KNOWLEDGE,	25,000.
EQUAL JUSTICE INITIATIVE 122 COMMERCE STREET MONTGOMERY, AL 36104	NONE	PC	EJI IS COMMITTED TO ENDING MASS INCARCERATION AND EXCESSIVE PUNISHMENT IN THE UNITED STATES, TO CHALLENGING RACIAL AND ECONOMIC INJUSTICE, AND TO PROTECTING BASIC HUMAN RIGHTS FOR THE MOST VULNERABLE PEOPLE IN AMERICAN SOCIETY.	50,000.
FEEDING AMERICA 35 E. WACKER DRIVE, SUITE 2000 CHICAGO, IL 60601	NONE	PC	FUNDING FOR AMERICA'S HUNGRY THROUGH A NATIONWIDE NETWORK OF FOOD BANKS IN THE FIGHT TO END HUNGER.	100,000.
FINCA 1201 15TH STREET NW 8TH FLOOR WASHINGTON, DC 20005	NONE	PC	FUNDING HELPS PROVIDE FINANCIAL SERVICES TO THE WORLD'S LOWEST-INCOME ENTREPRENEURS.	250,000.
FUNDERBURG SCHOLARS 199 PARK LANE CONCORD, MA 01742	NONE	PC	FUNDERBURG SCHOLARS IS AN ALL VOLUNTEER ORGANIZATION THAT HELPS INNER CITY YOUTH ATTEND COLLEGE. 86% OF OUR FUNDS WERE USED FOR TUITION AND 13% FOR TEXTBOOKS. THE STUDENTS ARE THOSE WHO ATTENDED THE UNITARIAN UNIVERSALIST URBAN MINISTRY'S AFTER SCHOOL	30,000.
GLOBAL ARTS PROJECT FOR PEACE PO BOX 40445 TUCSON, AZ 85717	NONE	PC	FUNDING FOR THE PROMOTION OF WORLD PEACE THROUGH USE OF THE ARTS.	30,000.
Total from continuation sheets				5,295,116.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
HAITI PROJECTS, INC. 31 LEONARD STREET ANNISQUAM, MA 01930	NONE	PC	FUNDING FOR THE EMPLOYMENT OF LOCAL HAITIAN WOMEN TO CREATE EMBROIDERED PRODUCTS AND LINENS TO STIMULATE INCOME PRODUCTION AND EMPLOYMENT OPPORTUNITIES.	72,000.
HARVARD DIVINITY SCHOOL 45 FRANCIS AVE CAMBRIDGE, MA 02138	NONE	PC	HARVARD DIVINITY SCHOOL IS A NONSECTARIAN SCHOOL OF RELIGIOUS AND THEOLOGICAL STUDIES THAT EDUCATES STUDENTS BOTH IN THE PURSUIT OF THE ACADEMIC STUDY OF RELIGION AND IN PREPARATION FOR LEADERSHIP IN RELIGIOUS, GOVERNMENTAL, AND A WIDE RANGE OF SERVICE	200,000.
HARVARD UNIV GRAD SCH ARTS/SCIENCES 1350 MASSACHUSETTS AVE HOLYOKE CENTER 350 CAMBRIDGE, MA 02138	NONE	PC	FUNDING FOR HARVARD UNIVERSITY GRADUATE SCHOOL OF ARTS AND SCIENCES TO EDUCATE STUDENTS.	300,000.
HUNTINGTON THEATRE COMPANY 264 HUNTINGTON AVE BOSTON, MA 02115	NONE	PC	FUNDING HELPS TRAIN AND SUPPORT THE NEXT GENERATION OF THEATRE ARTISTS, PROVIDES ART EDUCATION PROGRAMS THAT PROMOTE LIFE-LONG LEARNING TO A DIVERSE COMMUNITY, AND CELEBRATES THE ESSENTIAL POWER OF THE THEATRE.	50,000.
INSIGHT MEDITATION SOCIETY 1230 PLEASANT ST BARRE, MA 01005	NONE	PC	IMS IS A SPIRITUAL REFUGE FOR ALL WHO SEEK FREEDOM OF MIND AND HEART. WE OFFER MEDITATION RETREATS ROOTED IN THE EARLY BUDDHIST TEACHINGS OF ETHICS, CONCENTRATION AND WISDOM. THESE PRACTICES HELP DEVELOP AWARENESS AND COMPASSION IN OURSELVES, GIVING	200,000.
INWARD BOUND MINDFULNESS EDUCATION 768 GREAT POND RD N ANDOVER, MA 01845	NONE	PC	FUNDING FOR YOUTH TRAINING	320,000.
KARUNA-SHECHEN 237 WEST 35TH STREET SUITE 1101 NEW YORK, NY 10001	NONE	PC	KARUNA-SHECHEN WORKS TO PROVIDE HEALTH CARE, EDUCATION, AND SOCIAL SERVICES FOR THE UNDER-SERVED POPULATIONS OF INDIA, NEPAL, AND TIBET.	200,000.
Total from continuation sheets				

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
LAMA YESHE WISDOM PUBLICATIONS PO BOX 356 WESTON, MA 02493	NONE	PC	FUNDING HELPS TRANSLATE, EDIT, REPRODUCE, PUBLISH AND DISTRIBUTE EDUCATIONAL MATERIALS ON THE TEACHINGS OF LAMA YESHE AND LAMA ZAPA RINPOCHE TO THE GENERAL PUBLIC.	50,000.
MIND AND LIFE INSTITUTE 7007 WINCHESTER CIRCLE SUITE 100 BOULDER, CO 80301	NONE	PC	FUNDING FOR MEETINGS BETWEEN WESTERN SCIENTISTS AND LEADING CONTEMPLATIVE FIGURES TO STUDY SIMILARITIES AND DIFFERENCES BETWEEN WESTERN SCIENTIFIC PRACTICES AND CONTEMPLATIVE MEDITATIONAL TECHNIQUES.	1,300,028.
MONTESSORI DEVELOPMENT PARTNERSHIP 13693 BUTTERNUT ROAD BURTON, OH 44021	NONE	PC	TO DEVELOP AND IMPLEMENT MONTESSORI PROJECTS SUCH AS MEDIA DEVELOPMENT, STUDY GROUPS, PROFESSIONAL DEVELOPMENT, TEACHER TRAINING, CURRICULUM DEVELOPMENT, AND COLLABORATIVE PROGRAMS.	334,000.
ONE HEART WORLD-WIDE 1818 PACHECO ST SAN FRANCISCO, CA 94116	NONE	PC	PURPOSE IS TO DECREASE MATERNAL AND NEONATAL MORTALITY AND MORBIDITY IN REMOTE, RURAL AREAS.	25,000.
OXFAM AMERICA 26 WEST STREET BOSTON, MA 02111 BOSTON, MA 02111	NONE	PC	FUNDING IS FOR THE CREATION OF LASTING SOLUTIONS TO END POVERTY, HUNGER AND INJUSTICE. 170(B)(1)(A)(VI)	150,000.
PARTNERS IN HEALTH 800 BOYLSTON ST, SUITE 300 BOSTON, MA 02199	NONE	PC	OUR MISSION IS A PREFERENTIAL OPTION FOR THE POOR IN HEALTH CARE. BY ESTABLISHING LONG-TERM RELATIONSHIPS WITH SISTER ORGANIZATIONS BASED IN SETTINGS OF POVERTY, PARTNERS IN HEALTH STRIVES TO ACHIEVE TWO OVERARCHING GOALS: TO BRING BENEFITS OF MODERN	250,000.
PRAJNOPAYA INSTITUTE OF BUDDHIST STUDIES 40 MASSACHUSETTS AVE SUITE 063 CAMBRIDGE, MA 02139	NONE	PC	PURPOSE IS TO DEVOTE TO A NON-SECTARIAN AND NON-DENOMINATIONAL APPROACH TO DHARMA. STUDENTS ARE ENCOURAGED TO ENGAGE IN THE STUDY OF THE THERAVADA, MAHAYANA, AND VAJRAYANA (TRIYANA) SCHOOLS. PRAJNOPAYA ALSO BRINGS TOGETHER ALL FIVE SCHOOLS OF TIBETAN	125,000.
Total from continuation sheets				

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
PRISON MINDFULNESS INSTITUTE 98 COLUMBIA AVENUE CRANSTON, RI 02908	NONE	PC	PROVIDES PRISONERS, AND THOSE WHO WORK WITH THEM, WITH THE MOST EFFECTIVE CONTEMPLATIVE TOOLS FOR SELF-TRANSFORMATION AND REHABILITATION.	125,000.
PROJECT BREAD 145 BORDER STREET BOSTON, MA 02128	NONE	PC	FUNDING PROVIDES HUNGER RELIEF GRANTS TO FOOD PANTRIES, SOUP KITCHENS, FOOD BANKS, FOOD SALVAGE PROGRAMS, AND FOOD TRANSPORTATION PROGRAMS.	30,000.
RESURGE INTERNATIONAL 145 N. WOLFE ROAD SUNNYVALE, CA 94086	NONE	PC	RESURGE HAS FOCUSED ON PROVIDING PEOPLE IN DEVELOPING COUNTRIES WITH ACCESS TO LIFE-CHANGING RECONSTRUCTIVE SURGICAL CARE THAT IS SAFE, TIMELY AND AFFORDABLE. WE TRAIN THE NEXT GENERATION OF RECONSTRUCTIVE SURGEONS IN AFRICA, LATIN AMERICA AND ASIA; WORK WITH THEM TO	25,000.
ROSIE'S PLACE 889 HARRISON AVENUE BOSTON, MA 02118	NONE	PC	FUNDING HELPS PROVIDE FOOD AND NUTRITION, HOUSING, EMPLOYMENT, AND HEALTH SERVICES FOR POOR AND HOMELESS WOMEN IN BOSTON.	30,000.
ST BONIFACE HAITI FOUNDATION 40 GLEN AVE NEWTON, MA 02459	NONE	PC	HEALTH EQUITY INTERNATIONAL IS DEDICATED TO PROVIDING ESSENTIAL HEALTH SERVICES TO THE PEOPLE OF SOUTHERN HAITI, ESPECIALLY THE MOST VULNERABLE. WE ARE COMMITTED TO BUILDING A COMPREHENSIVE, EFFICIENT, AND RESILIENT HEALTH SYSTEM THAT PROVIDES HIGH QUALITY	75,000.
ST. BARBARA INSTITUTE FOR CONSCIOUSNESS STUDIES PO BOX 3573 SANTA BARBARA, CA 93130	NONE	PC	CONTEMPLATIVE RESEARCH AND EDUCATION.	40,000.
STILL HARBOR 666 DORCHESTER AVE BOSTON, MA 02127	NONE	PC	FUNDING TO SUPPORT THE OFFERING OF SPIRITUAL FORMATION AND ACCOMPANIMENT TO INDIVIDUALS AND ORGANIZATIONS CONCERNED WITH HUMAN THRIVING AND SOCIAL JUSTICE.	20,000.
Total from continuation sheets				

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
TEENSMART INTERNATIONAL 107 APPLE CART WAY MORRISVILLE, NC 27560	NONE	PC	LIFE-SKILLS EDUCATION FOR TEENAGERS	50,000.
THE HUNGER PROJECT 15 EAST 26TH STREET NEW YORK, NY 10010	NONE	PC	FUNDING GOES TOWARDS EMPOWERING PEOPLE TO CREATE LASTING PROGRESS THROUGH EDUCATION, HEALTH, NUTRITION, FAMILY INCOMES AND GENDER EQUALITY.	100,000.
THE TIBET FUND 241 EAST 32ND STREET NEW YORK, NY 10016	NONE	PC	FUNDING PROVIDES HUMANITARIAN AID PROGRAMS FOR TIBETAN REFUGEES AND TIBETANS IN TIBET.	75,000.
THE UMBRELLA COMMUNITY ARTS CENTER 40 STOW ST CONCORD, MA 01742	NONE	PC	THE UMBRELLA ENRICHES THE LIFE OF THE COMMUNITY BY, NURTURING CREATIVE EXPRESSION IN PEOPLE OF ALL AGES, FOSTERING A COMMUNITY OF ARTISTS, BUILDING INNOVATIVE MULTIDISCIPLINARY INITIATIVES, AND ENCOURAGING COMMUNITY ORGANIZATIONS AND COMMUNITY COLLABORATION.	20,000.
THOMPSON ISLAND OUTWARD BOUND PO BOX 127 BOSTON, MA 02127	NONE	PC	TO PROVIDE INDIVIDUALS WITH ADVENTUROUS AND CHALLENGING EXPERIMENTAL LEARNING PROGRAMS THAT INSPIRE CHARACTER DEVELOPMENT, COMPASSION, COMMUNITY SERVICE, ENVIRONMENTAL RESPONSIBILITY AND ACADEMIC ACHIEVEMENT.	75,000.
UC DAVIS FOUNDATION 1 SHIELDS AVE DAVIS, CA 95616	NONE	PC	FUNDING FOR UNIVERSITY OF CALIFORNIA, DAVIS TO EDUCATE STUDENTS.	104,088.
UNIV OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 53726	NONE	PC	AIDS UNIVERSITY OF WISCONSIN-MADISON BY SOLICITING GIFTS AND BEQUESTS, ADMINISTERS AND INVESTS SECURITIES AND PROPERTY AND DISTRIBUTES PAYMENTS FOR BENEFIT OF UW-MADISON.	275,000.
Total from continuation sheets				

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information (continued)

3a Grants and Contributions Paid During the Year

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
UPAYA INSTITUE AND ZEN CENTER 1404 CERRO GORDO ROAD SANTA FE, NM 87501	NONE	PC	UPAYA ZEN CENTER IS MODEL OF SOCIALLY ENGAGED BUDDHISM. IT BRINGS TOGETHER MANY PROJECTS FOCUSED ON SOCIAL TRANSFORMATION, INCLUDING WORK IN PRISONS, END-OF-LIFE CARE, SERVING THE HOMELESS, TRAINING OF CHAPLAINS IN SOCIALLY ENGAGED PRACTICE, PEACE AND	100,000.
WISDOM PUBLICATIONS 199 ELM ST SOMERVILLE, MA 02144	NONE	PC	THE LEADING PUBLISHER OF CONTEMPORARY AND CLASSIC BOOKS AND PRACTICAL WORKS ON BUDDHISM, MINDFULNESS, MEDITATION, AND OTHER CONTEMPLATIVE TRADITIONS. WISDOM IS A NONPROFIT CHARITABLE ORGANIZATION DEDICATED TO CULTIVATING WRITERS AND TEACHERS THE	40,000.
Total from continuation sheets				

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - ALTRUISM IN MEDICINE INSTITUTE

THE MISSION OF THE ALTRUISM MEDICINE INSTITUTE IS TO PROMOTE AND SUPPORT RIGOROUS, MULTI-DISCIPLINARY SCIENTIFIC INVESTIGATION OF THE ROLE OF ALTRUISM AND HEALTHY MENTAL STATES IN FOSTERING A MORE PEACEFUL AND HAPPY SOCIETY. RESEARCH AND KNOWLEDGE SERVE AS THE FOUNDATION FOR THE PROMOTION AND EDUCATION OF ALTRUISM

NAME OF RECIPIENT - AMERICAN REPERTORY THEATRE

FUNDING HELPS EXPAND THE BOUNDARIES OF THEATRE, PRODUCTION, PERFORMING, AND PRESENTING LITERARY WORKS.

NAME OF RECIPIENT - BIDMC

BETH ISRAEL DEACONESS MEDICAL CENTER SERVES PATIENTS COMPASSIONATELY AND EFFECTIVELY, AND CREATES A HEALTHY FUTURE FOR THEM AND THEIR FAMILIES. OUR MISSION IS SUPPORTED BY OUR COMMITMENT TO PERSONALIZED, EXCELLENT CARE FOR OUR PATIENTS; A WORKFORCE COMMITTED TO INDIVIDUAL ACCOUNTABILITY, MUTUAL RESPECT AND COLLABORATION; AND A COMMITMENT TO MAINTAINING OUR FINANCIAL HEALTH.

NAME OF RECIPIENT - CENTER FOR CONTEMPLATIVE MIND IN SOCIETY

THE CENTER FOR CONTEMPLATIVE MIND IN SOCIETY TRANSFORMS HIGHER EDUCATION BY SUPPORTING AND ENCOURAGING THE USE OF CONTEMPLATIVE/INTROSPECTIVE PRACTICES AND PERSPECTIVES TO CREATE ACTIVE LEARNING AND RESEARCH ENVIRONMENTS THAT LOOK DEEPLY INTO EXPERIENCE AND MEANING FOR ALL IN SERVICE OF A MORE JUST AND COMPASSIONATE SOCIETY.

NAME OF RECIPIENT - DALAI LAMA CTR FOR ETHICS & TRANSFORMATIVE VALUES

DEDICATED TO INQUIRY, DIALOGUE, AND EDUCATION ON THE ETHICAL AND HUMANE

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

DIMENSIONS OF LIFE. AS A COLLABORATIVE AND NONPARTISAN THINK TANK, THE CENTER FOCUSES ON THE DEVELOPMENT OF INTERDISCIPLINARY RESEARCH AND PROGRAMS IN VARIED FIELDS OF KNOWLEDGE, FROM SCIENCE AND TECHNOLOGY TO EDUCATION AND INTERNATIONAL RELATIONS. OUR PROGRAMS EMPHASIZE RESPONSIBILITY AND EXAMINE MEANINGFULNESS AND MORAL PURPOSE BETWEEN INDIVIDUALS, ORGANIZATIONS, AND SOCIETIES.

NAME OF RECIPIENT - FUNDERBURG SCHOLARS

FUNDERBURG SCHOLARS IS AN ALL VOLUNTEER ORGANIZATION THAT HELPS INNER CITY YOUTH ATTEND COLLEGE. 86% OF OUR FUNDS WERE USED FOR TUITION AND 13% FOR TEXTBOOKS. THE STUDENTS ARE THOSE WHO ATTENDED THE UNITARIAN UNIVERSALIST URBAN MINISTRY'S AFTER SCHOOL ROXBURY YOUTH PROGRAM.

NAME OF RECIPIENT - HARVARD DIVINITY SCHOOL

HARVARD DIVINITY SCHOOL IS A NONSECTARIAN SCHOOL OF RELIGIOUS AND THEOLOGICAL STUDIES THAT EDUCATES STUDENTS BOTH IN THE PURSUIT OF THE ACADEMIC STUDY OF RELIGION AND IN PREPARATION FOR LEADERSHIP IN RELIGIOUS, GOVERNMENTAL, AND A WIDE RANGE OF SERVICE ORGANIZATIONS.

NAME OF RECIPIENT - INSIGHT MEDITATION SOCIETY

IMS IS A SPIRITUAL REFUGE FOR ALL WHO SEEK FREEDOM OF MIND AND HEART. WE OFFER MEDITATION RETREATS ROOTED IN THE EARLY BUDDHIST TEACHINGS OF ETHICS, CONCENTRATION AND WISDOM. THESE PRACTICES HELP DEVELOP AWARENESS AND COMPASSION IN OURSELVES, GIVING RISE TO GREATER PEACE AND HAPPINESS IN THE WORLD.

NAME OF RECIPIENT - PARTNERS IN HEALTH

OUR MISSION IS A PREFERENTIAL OPTION FOR THE POOR IN HEALTH CARE. BY

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

ESTABLISHING LONG-TERM RELATIONSHIPS WITH SISTER ORGANIZATIONS BASED IN SETTINGS OF POVERTY, PARTNERS IN HEALTH STRIVES TO ACHIEVE TWO OVERARCHING GOALS: TO BRING BENEFITS OF MODERN MEDICAL SCIENCE TO THOSE MOST IN NEED OF THEM AND TO SERVE AS AN ANTIDOTE TO DESPAIR.

NAME OF RECIPIENT - PRAJNOPAYA INSTITUTE OF BUDDHIST STUDIES
PURPOSE IS TO DEVOTE TO A NON-SECTARIAN AND NON-DENOMINATIONAL APPROACH TO DHARMA. STUDENTS ARE ENCOURAGED TO ENGAGE IN THE STUDY OF THE THERAVADA, MAHAYANA, AND VAJRAYANA (TRIYANA) SCHOOLS. PRAJNOPAYA ALSO BRINGS TOGETHER ALL FIVE SCHOOLS OF TIBETAN BUDDHISM.

NAME OF RECIPIENT - RESURGE INTERNATIONAL
RESURGE HAS FOCUSED ON PROVIDING PEOPLE IN DEVELOPING COUNTRIES WITH ACCESS TO LIFE-CHANGING RECONSTRUCTIVE SURGICAL CARE THAT IS SAFE, TIMELY AND AFFORDABLE. WE TRAIN THE NEXT GENERATION OF RECONSTRUCTIVE SURGEONS IN AFRICA, LATIN AMERICA AND ASIA; WORK WITH THEM TO CREATE A SUSTAINABLE BUSINESS MODEL; AND TOGETHER, WE PROVIDE HIGH QUALITY RECONSTRUCTIVE SURGICAL CARE TO PEOPLE LIVING IN POVERTY AND IN REMOTE AREAS.

NAME OF RECIPIENT - ST BONIFACE HAITI FOUNDATION
HEALTH EQUITY INTERNATIONAL IS DEDICATED TO PROVIDING ESSENTIAL HEALTH SERVICES TO THE PEOPLE OF SOUTHERN HAITI, ESPECIALLY THE MOST VULNERABLE. WE ARE COMMITTED TO BUILDING A COMPREHENSIVE, EFFICIENT, AND RESILIENT HEALTH SYSTEM THAT PROVIDES HIGH QUALITY CARE. WE BELIEVE THAT ENSURING ACCESS TO LIFE-SAVING AND LIFE-CHANGING HEALTH SERVICES IS A CRITICAL COMPONENT TO BUILDING STRONG AND PRODUCTIVE COMMUNITIES.

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - UPAYA INSTITUE AND ZEN CENTER

UPAYA ZEN CENTER IS MODEL OF SOCIALLY ENGAGED BUDDHISM. IT BRINGS TOGETHER MANY PROJECTS FOCUSED ON SOCIAL TRANSFORMATION, INCLUDING WORK IN PRISONS, END-OF-LIFE CARE, SERVING THE HOMELESS, TRAINING OF CHAPLAINS IN SOCIALLY ENGAGED PRACTICE, PEACE AND NON-VIOLENCE WORK, TRAINING OF CLINICIANS ALL OVER THE WORLD IN COMPASSIONATE CARE, AND DELIVERING HEALTHCARE IN REMOTE REGIONS OF THE HIMALAYAS. UPAYA IS A GLOBAL COMMUNITY FOR THOSE WORKING TO CREATE RACIAL, ECONOMIC, AND ENVIRONMENTAL JUSTICE, COMPASSIONATE CARE FOR THE MOST VULNERABLE, AND A PLACE OF COMMITTED, DAILY CONTEMPLATIVE PRACTICE AND LEARNING THROUGH ITS RETREATS, TRAININGS, AND PROGRAMS, FREE DHARMA PODCASTS AND COMMUNITY SERVICES.

NAME OF RECIPIENT - WISDOM PUBLICATIONS

THE LEADING PUBLISHER OF CONTEMPORARY AND CLASSIC BOOKS AND PRACTICAL WORKS ON BUDDHISM, MINDFULNESS, MEDITATION, AND OTHER CONTEMPLATIVE TRADITIONS. WISDOM IS A NONPROFIT CHARITABLE ORGANIZATION DEDICATED TO CULTIVATING WRITERS AND TEACHERS THE WORLD OVER, ADVANCING CRITICAL SCHOLARSHIP, PRESERVING AND SHARING THE LITERARY CULTURE OF VARIOUS CONTEMPLATIVE TRADITIONS, AND HELPING PEOPLE FIND AND ENGAGE WITH THE TEACHERS, TEACHINGS, AND PRACTICES FOR A WISE AND COMPASSIONATE LIFE.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
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			14	177,440.	
4 Dividends and interest from securities			14	1,888,459.	
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	211,188.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		2,277,087.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 2,277,087.

(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)

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
	0.		

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
N/A		

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

Signature of officer or trustee — Date 11/16/20 — Title TRUSTEE

May the IRS discuss this return with the preparer shown below? See instr ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
CHRISTOPHER P. KEARLEY	Christopher P. Kearley CPA	11/13/2020		P01245937

Firm's name ▶ ERNST & YOUNG U.S. LLP — Firm's EIN ▶ 34-6565596

Firm's address ▶ 725 SOUTH FIGUEROA STREET LOS ANGELES, CA 90017-5418 — Phone no. 213-240-7000

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 **2019**

Name of the organization	Employer identification number
THE HERSHEY FAMILY FOUNDATION ROPES & GRAY LLP/CCASEY	34-1574366

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	[X] 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

[X] 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	Employer identification number
THE HERSHEY FAMILY FOUNDATION ROPES & GRAY LLP/CCASEY	34-1574366

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	BARRY J. HERSHEY 381 GARFIELD ROAD CONCORD, MA 01742	$ 2,463,919.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
THE HERSHEY FAMILY FOUNDATION ROPES & GRAY LLP/CCASEY	34-1574366

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
1	20,207 SHARES OF CONOCOPHILLIPS	$ 1,210,399.	11/22/19

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	17,000 SHARES OF ROYAL DUTCH SHELL PLC	$ 1,002,150.	11/22/19

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	28,000 SHARES OF BP PLC SPON ADR (BP)	$ 1,079,400.	11/22/19

(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: THE HERSHEY FAMILY FOUNDATION ROPES & GRAY LLP/CCASEY

Employer identification number: 34-1574366

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 info once) ▶ $

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

FORM 990-PF LEGAL FEES STATEMENT 1

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	6,409.	6,409.	0.	0.
TO FM 990-PF, PG 1, LN 16A	6,409.	6,409.	0.	0.

FORM 990-PF	ACCOUNTING FEES			STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ERNST & YOUNG	21,525.	10,763.	0.	10,762.
TO FORM 990-PF, PG 1, LN 16B	21,525.	10,763.	0.	10,762.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CUSTODIAN FEES AND BANK CHARGE	31,011.	31,011.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	31,011.	31,011.	0.	0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	15,040.	15,040.	0.	0.
STATE TAXES	500.	500.	0.	0.
FEDERAL TAXES	90,000.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	105,540.	15,540.	0.	0.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
US TRUST	11,808,461.	41,759,296.
VANGUARD BROKERAGE	10,497,440.	11,566,590.
VANGUARD MUTUAL FUNDS	4,603,754.	9,470,974.
TOTAL TO FORM 990-PF, PART II, LINE 10B	26,909,655.	62,796,860.

FORM 990-PF CORPORATE BONDS STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
US TRUST - CORP BONDS	6,313,135.	6,423,159.
TOTAL TO FORM 990-PF, PART II, LINE 10C	6,313,135.	6,423,159.