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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

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

OMB No. 1545-0052

2020

Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020

, and ending 12-31-2020

Name of foundation Blue Cross and Blue Shield of Massachusetts Foundation for Expanding Healthcare Access % MICHAEL CARDER		A Employer identification number 04-3148824	
Number and street (or P.O. box number if mail is not delivered to street address) 101 Huntington Avenue Suite 1300	Room/suite	B Telephone number (see instructions) (617) 246-5000	
City or town, state or province, country, and ZIP or foreign postal code Boston, MA 021997611		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 108,059,342	J Accounting method: ☐ 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) (see instructions).)	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	1,296,302			
	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	762,765	762,765		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	5,367,431			
	b Gross sales price for all assets on line 6a _____ 19,986,425				
	7 Capital gain net income (from Part IV, line 2)		5,367,431		
	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)					
12 Total. Add lines 1 through 11	7,426,498	6,130,196			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	153,870			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	108,677			108,677
	21 Travel, conferences, and meetings	33,753			33,753
	22 Printing and publications	5,386			5,386
	23 Other expenses (attach schedule)	3,559,544			3,559,544
	24 Total operating and administrative expenses. Add lines 13 through 23	3,861,230	0		3,707,360
	25 Contributions, gifts, grants paid	3,877,104			3,877,104
26 Total expenses and disbursements. Add lines 24 and 25	7,738,334	0		7,584,464	
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-311,836			
	b Net investment income (if negative, enter -0-)		6,130,196		
c Adjusted net income (if negative, enter -0-)					

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2020)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	850,094	2,522,021	
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>28,057</u>			
	Less: allowance for doubtful accounts ▶ _____	38,553	28,057	
	4 Pledges receivable ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable	87,173	232,888	
	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)		78,379,429	76,341,445	108,059,342
14 Land, buildings, and equipment: basis ▶ _____				
Less: accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		79,355,249	79,124,411	108,059,342
17 Accounts payable and accrued expenses		86,958	17,450	
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 ▶ _____)		929,769	1,080,278	
23 Total liabilities (add lines 17 through 22)		1,016,727	1,097,728	
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	105,116,868	109,744,581	
	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)	105,116,868	109,744,581	
30 Total liabilities and net assets/fund balances (see instructions) .	106,133,595	110,842,309		

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	105,116,868
2 Enter amount from Part I, line 27a	2	-311,836
3 Other increases not included in line 2 (itemize) ▶ _____	3	4,939,549
4 Add lines 1, 2, and 3	4	109,744,581
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	109,744,581

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., 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 REALIZED GAIN OR LOSS			
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 19,986,425		14,618,994	5,367,431
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			5,367,431
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	5,367,431
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	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

1 Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
2 Reserved		2	
3 Reserved.		3	
4 Reserved		4	
5 Reserved		5	
6 Reserved		6	
7 Reserved		7	
8 Reserved ,		8	

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	Reserved.	1	85,210
c	All other domestic foundations enter 1.39% 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	85,210
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	85,210
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	108,382
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	108,382
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	23,172
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 23,172 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes.</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes
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 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	No

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address bcbsmafoundation.org	13	Yes	
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 **021997611**

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 2020, 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 ▶	16	Yes No

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	No
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 2020?	1c	No
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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
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	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
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 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
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 2020?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	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.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No		7b	
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 during the year?	☐ Yes ☒ No		

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Attachment 	0	0	0	0
101 Huntington Avenue Suite 1300 Boston, MA 021997611	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
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
MANATT PHELPS & PHILLIPS LLP 7 Times Square NEW YORK, NY 10036	CONSULTING	609,397
TYE LAWRENCE S 139A Fayerwaeather Street CAMBRIDGE, MA 02138	CONSULTING	140,890
UNIVERSITY OF MASSACHUSETTS MEDICAL SCHO 55 Lake Ave North Worcester MA 0165 NORTH WORCESTER, MA 01655	CONSULTING	105,280
NEPC LLC 255 State Street BOSTON, MA 02109	0	127,709
CENTER FOR HEALTH CARE STRATEGIES INC 200 American Metro Blvd 119 TRENTON, NJ 08619	CONSULTING	195,996

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	
2	
3	
4	

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	

Total. Add lines 1 through 3 ►

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	100,651,327
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	100,651,327
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	0
3	Subtract line 2 from line 1d.	3	100,651,327
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,509,770
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	99,141,557
6	Minimum investment return. Enter 5% of line 5.	6	4,957,078

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	4,957,078
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	85,210
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	85,210
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	4,871,868
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	4,871,868
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	4,871,868

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	7,584,464
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	7,584,464
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	7,584,464

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				4,871,868
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 2018, 2017, 2016		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	4,572,468			
b From 2016.	4,298,743			
c From 2017.	3,732,685			
d From 2018.	2,441,391			
e From 2019.	2,695,308			
f Total of lines 3a through e.	17,740,595			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ <u>7,584,464</u>				
a Applied to 2019, but not more than line 2a			0	
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 2020 distributable amount.				4,871,868
e Remaining amount distributed out of corpus	2,712,596			
5 Excess distributions carryover applied to 2020. (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	20,453,191			
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.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. 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).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	4,572,468			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	15,880,723			
10 Analysis of line 9:				
a Excess from 2016.	4,298,743			
b Excess from 2017.	3,732,685			
c Excess from 2018.	2,441,391			
d Excess from 2019.	2,695,308			
e Excess from 2020.	2,712,596			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling. ▶

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

2a 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) 2020	(b) 2019	(c) 2018	(d) 2017	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NOT APPLICABLE

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

NOT APPLICABLE

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

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

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

AUDREY SHELTO
101 HUNTINGTON AVENUE SUITE 1300
BOSTON, MA 021997611
(617) 246-5000

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

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

c Any submission deadlines:

N/A

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

N/A

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 101 Huntington Avenue Suite 1300 Boston, MA 02199	FILER ADDRESS	I	TOTAL GRANTS PAID	3,877,104
Total ► 3a				3,877,104
b <i>Approved for future payment</i>				
Total ► 3b				

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 CONTRIBUTIONS, GIFTS, AND GRANTS						1,296,302
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	762,765	
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	5,367,431	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a UNREALIZED GAIN OR LOSS ON INVESTMENTS				14		4,939,549
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e). . .					6,130,196	6,235,851
13 Total. Add line 12, columns (b), (d), and (e).						12,366,047

[illegible]

TY 2020 All Other Program Related Investments Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

All Other Program Related Investments Schedule

Category	Amount
NONE	

TY 2020 Compensation Explanation

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Person Name	Explanation
See Attachment	SEE ATTACHMENT

TY 2020 Contractor Compensation Explanation

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Contractor	Explanation
MANATT PHELPS PHILLIPS LLP	PROFESSIONAL LEGAL AND CONSULTING SERVICES
TYE LAWRENCE S	PROFESSIONAL CONSULTING SERVICES
UNIVERSITY OF MASSACHUSETTS MEDICAL	PROFESSIONAL CONSULTING SERVICES
NEPC LLC	CONSULTING
CENTER FOR HEALTH CARE STRATEGIES I	CONSULTING

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2020 Depreciation Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

TY 2020 Investments - Other Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ACCESS CAPITAL COMM INV FUND	FMV	4,176,424	4,024,252
PUTNAM TOTAL RETURN FUND	FMV	13,962,343	13,851,512
PIMCO ALL ASSET FUND	FMV	3,162,924	3,377,090
SSGA S&P 500 TOBACCO FREE FUND	FMV	15,560,026	37,485,652
SANDERSON TOBACCO FREE IN FUND	FMV	8,195,112	16,329,128
PIMCO TOTAL RETURN FUND	FMV		
IRONBRIDGE SM CAP LIFE CY FUND	FMV	6,880,821	6,831,128
CF DV DYNAMIC GROWTH FUND	FMV	2,481,544	3,251,233
SCHRODER EM MKT M/S BND-R6	FMV	4,542,668	4,426,133
SEGALL BRYANT & HAMILL INTL SM	FMV	5,268,781	4,353,658
SSGA US TIPS INDEX STRATEGY	FMV	3,598,843	4,386,950
SCHRODER EMERG MKT EQ FD-SDR	FMV	4,011,959	5,071,532
WILLIAM BLAIR EMERGING MARKET	FMV	4,500,000	4,671,074

TY 2020 Other Expenses Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE AND TELEPHONE	17,376			17,376
EXTERNAL PROFESSIONAL SERVICES	1,677,495			1,677,495
PURCHASED SERVICES FROM BCBS	1,860,843			1,860,843
MISCELLANEOUS EXPENSES	3,830			3,830

TY 2020 Other Income Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Unrealized Gain Or Loss on Investments			

TY 2020 Other Increases Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Other Increases Schedule

Description	Amount
UNREALIZED GAIN OR LOSS ON INVESTMENTS	4,939,549

TY 2020 Other Liabilities Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

EIN: 04-3148824

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO AFFILIATE BLUE CROSS AN	339,034	585,673
FEDERAL INCOME TAXES ON INVEST	372,220	440,880
FEDERAL INCOME TAX LIABILITY	218,515	53,725

TY 2020 Taxes Schedule

Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access
EIN: 04-3148824

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX ON INVESTMENT INCOME	153,870			

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93491311002011	
Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service		Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.			OMB No. 1545-0047 2020
Name of the organization Blue Cross and Blue Shield of Massachusetts Foundation for Expanding Healthcare Access				Employer identification number 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 other 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 33¹/₃% 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 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization Blue Cross and Blue Shield of Massachusetts Foundation for Expanding Healthcare Access	Employer identification number 04-3148824
---	--

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
—	See Additional Data Table 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)
—	 	\$ 	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contribution.)

Name of organization Blue Cross and Blue Shield of Massachusetts Foundation for Expanding Healthcare Access	Employer identification number 04-3148824
---	--

Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given (see instructions). Use duplicate copies of Part II if additional space is needed.	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Name of organization Blue Cross and Blue Shield of Massachusetts Foundation for Expanding Healthcare Access	Employer identification number 04-3148824
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Part III

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

Additional Data

Software ID:
Software Version:
EIN: 04-3148824
Name: Blue Cross and Blue Shield of Massachusetts
Foundation for Expanding Healthcare Access

Form 990 Schedule B, 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
<u>1</u>	Robert Wood Johnson Foundation	\$ 21,250	Person ☒
	50 College Road East		Payroll ☐
	Princeton, NJ 085432316		Noncash ☐ (Complete Part II for noncash contribution.)
<u>2</u>	Employees of Blue Cross Blue Shield	\$ 123,468	Person ☐
	101 Huntington Avenue Suite 1300		Payroll ☒
	Boston, MA 021997611		Noncash ☐ (Complete Part II for noncash contribution.)
<u>3</u>	National Institute for Healthcare M	\$ 19,000	Person ☒
	1225 19th Street NW Ste 710		Payroll ☐
	Washington, DC 20036		Noncash ☐ (Complete Part II for noncash contribution.)
<u>4</u>	Blue Cross Blue Shield of Masachuse	\$ 964,734	Person ☒
	101 Huntington Avenue Suite 1300		Payroll ☐
	Boston, MA 021997611		Noncash ☐ (Complete Part II for noncash contribution.)
<u>5</u>	CT Health Foundation	\$ 20,000	Person ☒
	100 Pearl Street		Payroll ☐
	Hartford, CT 06103		Noncash ☐ (Complete Part II for noncash contribution.)
<u>6</u>	Bower Foundation Grant - HC Fellows	\$ 19,000	Person ☒
	578 Highland Colony Parkway Suite 1		Payroll ☐
	Ridgeland, MS 39157		Noncash ☐ (Complete Part II for noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>7</u>	St David's Foundation	<u>\$ 5,000</u>	Person ☒
	1303 San Antonio Street Suite 500		Payroll ☐
	San Antonio, TX 78701		Noncash ☐ (Complete Part II for noncash contribution.)
<u>8</u>	Episcopal Health Foundation	<u>\$ 5,000</u>	Person ☒
	500 Fannin St Suite 300		Payroll ☐
	Houston, TX 77002		Noncash ☐ (Complete Part II for noncash contribution.)
<u>9</u>	Meadows Mental Health Policy - 2019	<u>\$ 5,000</u>	Person ☒
	1303 San Antonio Street Suite 810		Payroll ☐
	San Antonio, TX 78701		Noncash ☐ (Complete Part II for noncash contribution.)
<u>10</u>	Methodist Healthcare Minsitries of	<u>\$ 5,000</u>	Person ☒
	4507 Medical Drive San Antonio		Payroll ☐
	San Antonio, TX 78229		Noncash ☐ (Complete Part II for noncash contribution.)
<u>11</u>	Robert Wood Johnson Foundation gra	<u>\$ 18,850</u>	Person ☒
	50 College Road East Princeton		Payroll ☐
	Princeton, NJ 085432316		Noncash ☐ (Complete Part II for noncash contribution.)
<u>12</u>	Henry J Kaiser Foundation	<u>\$ 20,000</u>	Person ☒
	185 Berry Street - Suite 2000		Payroll ☐
	San Francisco, CA 94107		Noncash ☐ (Complete Part II for noncash contribution.)

Form 990 Schedule B, 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
<u>13</u>	Main Health Access Foundation	<u>\$ 19,000</u>	Person ☒
	150 Capitol Street Suite 4		Payroll ☐
	Augusta, ME 04330		Noncash ☐ (Complete Part II for noncash contribution.)
<u>14</u>	Blue Shield of CA Foundation	<u>\$ 40,000</u>	Person ☒
	315 Montgomery Street Suite 1200		Payroll ☐
	San Francisco, CA 94104		Noncash ☐ (Complete Part II for noncash contribution.)
<u>15</u>	Episcopal Health Foundation	<u>\$ 5,000</u>	Person ☒
	500 Fannin St Suite 300		Payroll ☐
	Houston, TX 77002		Noncash ☐ (Complete Part II for noncash contribution.)
<u>16</u>	Meadows Mental Health Policy Instit	<u>\$ 5,000</u>	Person ☒
	1303 San Antonio Street Suite 810		Payroll ☐
	San Antonio, TX 78701		Noncash ☐ (Complete Part II for noncash contribution.)

Page 6 Part VIII	Titles of officers and directors:	Address & Telephone of all Officers and Directors:
Manny Lopes	Board Chairman	101 Huntington Avenue Boston, MA 02199-7611 617 246-5000
Patricia Washington	Vice-Chair	
Audrey Shelto	President	
Anthony Criscuolo	Treasurer	
Melissa Bradley	Clerk	
Marie Fallon	Assistant Clerk	
JD Chesloff	Director	
Andrew Dreyfus	Director	
Sandro Galea	Director	
Shelly Greenfield	Director	
Michael Hunter	Director	
Thea James	Director	
Mary Kay Leonard	Director	
Antonia (Toni) McGuire	Director	
Michael Miller	Director	
Sandhya Rao	Director	
Henry Thomas III	Director	

The Officers and Directors listed on this attachment are not compensated by Blue Cross and Blue Shield Foundation Inc, For Expanding Healthcare Access.

Full Proposal Record Type	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Catalyst Fund	Abortion Rights Fund of Western Massachusetts	P.O. Box 2162, Amherst, MA 01004	\$5,000.00	4/15/2020	Funding to hire a strategic planning consultant to help expand areas of focus and increase impact.
Catalyst Fund	Adolescent Consultation Services	189 Cambridge Street, Cambridge, MA 02141	\$5,000.00	3/2/2020	Funding to obtain the services of the Institute for Community Health to develop and implement an organization-wide evaluation matrix.
Catalyst Fund	Backyard Growers	3 Duncan Street, Gloucester, MA 01930	\$2,040.00	8/27/2020	Funding to purchase equipment and accessories to create high-quality and engaging virtual content and to safely and effectively deliver programs and food resources to children and families during the pandemic. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Berkshire Center for Justice	284 Main St, Suite 7, Great Barrington, Massachusetts 01230	\$5,000.00	10/6/2020	Funding to hire a grant writer to raise funds to meet increased demand for services due to the pandemic and for outreach activities in accordance with health and safety guidelines for COVID-19. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Boston Arts Academy Foundation	45 Temple Place, Boston, MA 02111	\$5,000.00	10/6/2020	Funding to provide supplies and coping resources for students engaged in mental health programs due to loss, stress, and anxiety related to the pandemic and racial climate. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Boston Cancer Support	831 Beacon Street #107, Newton, Massachusetts 02459	\$5,000.00	3/2/2020	Funding to hire a strategic planning consultant to help Boston Cancer Support develop a three-year strategic plan.
Catalyst Fund	Bread of Life	54 Eastern Avenue, Malden, MA 02148	\$4,800.00	4/22/2020	Funding to provide food delivery for home-bound individuals during the Massachusetts COVID-19 "stay at home" advisory. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Building Audacity	75 Allen Avenue, Lynn, Ma 01902	\$5,000.00	11/23/2020	Funding to fund food and basic needs while youth access academic supports and connect with its multi-lingual mental health practitioner. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Community Farms Outreach, d/b/a Waltham Fields Community Farm	240 Beaver Street, Waltham, MA 02452	\$5,000.00	6/24/2020	Funding to ensure safe food growing, harvesting, packing and delivery procedures during the pandemic, enabling them to continue their healthy food access programs, including donations to food banks and emergency nutrition services, a weekly low-income mobile market, half-price farm shares, and a Produce Prescription Rx Pilot with Charles River Community Health Center. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Community Health Programs, Inc.	444 Stockbridge Road, Great Barrington, MA 01230	\$5,000.00	3/2/2020	Funding to purchase and install a KaVo NOMAD Pro 2 handheld x-ray system to allow the organization to give multiple patients x-rays at the same time.
Catalyst Fund	De Novo	47 Thorndike Street, SB-L1-1, Cambridge, Massachusetts 02141	\$5,000.00	6/24/2020	Funding to purchase teleworking equipment, a credit card processing system to capture remote co-pays, and a HIPAA-compliant software to support their teletherapy expansion during COVID-19. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Dixmas House of Massachusetts, Inc.	PO Box 30125, Worcester, MA 01603	\$5,000.00	10/26/2020	Funding to meet increased needs resulting from the pandemic, including for grocery, sanitation, and personal protective equipment. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Exceptional Lives Inc.	77 Heath Street, Brookline, MA 02445	\$4,000.00	6/24/2020	Funding to translate, critical information related to the coronavirus into other languages for parents of children with disabilities. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Fall River Deaconess Home	259 Prospect Street, Fall River, MA 02720	\$5,000.00	4/22/2020	Funding to purchase personal protective equipment, grocery cards, supplies and technology enhancements as a COVID-19 Response project. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Families for Depression Awareness	391 Totten Pond Road, Suite 101, Waltham, MA 02451	\$5,000.00	5/28/2020	Funding to hire a public health consultant to rapidly assess and modify the organization's teen depression program for the current environment with a focus on serving low-income teens from underserved sectors of Greater Boston disproportionately affected by the COVID. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Farrington Memorial Inc dba Farrington Nature Linc	PO BOX 293, Lincoln, MA 01773	\$5,000.00	8/27/2020	Funding to expand the garden to meet increased demand for healthy food for participating teens with low-income and for their food pantry and for equipment to engage participants in virtual programming. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Found in Translation	1532B Dorchester Ave., Dorchester, MA 02122	\$5,000.00	4/15/2020	Funding to cover implementation costs of transitioning the organization to Intaia bookkeeping and accounting software.
Catalyst Fund	Heading Home	529 Main Street, Suite 100, Charlestown, MA 02129	\$5,000.00	4/22/2020	Funding to offset unplanned items such as food, supplies, cleaning services and increased staff time in response to COVID-19. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Health Care Without Walls	148 Linden Street, Suite 208, Wellesley, MA 02482	\$3,898.00	3/27/2020	Funding to purchase new technology equipment i.e., three laptops and two iPhones that would make it possible for Community Health Workers to be more mobile and efficiently address client needs in real time.
Catalyst Fund	Hospitality Homes	P.O. Box 15265, Boston, MA 02215	\$5,000.00	10/26/2020	Funding to hire a trainer and bookkeeper to maximize donor software and integrate it with financial management tools to better manage relationships with donors and hosts remotely in the pandemic. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Junk Roots Inc.	34 Glenbrook Drive, Apt. 1B, Greenfield, MA 01301	\$5,000.00	6/24/2020	Funding to support a 2-0 week CSA program with weekly distribution of farm fresh food and nutrition/cooking resources providing food security to meet increased demand as a result of COVID-19. JR partners with the Community Health Center of Franklin County through a direct referral program, enrolling food insecure patients into the CSA program. JR also works with affordable housing complexes, offering year-round food access/health equity programming. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Metro Housing Boston	1411 Tremont Street, Boston, Massachusetts 02120-3401	\$5,000.00	4/22/2020	Funding for an Emergency Assistance Fund to patients at Boston Medical Center including food, furniture, move in costs, diapers in response to COVID-19. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	MetroWest Legal Services	65 Fountain Street, Suite 304, Framingham, MA 01702	\$5,000.00	5/28/2020	Funding to purchase laptops, printers, scanners and licenses for remote video conferencing for use by attorneys and intake staff to work remotely while providing legal assistance to clients. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Mill City Grows Inc	650 Suffolk Street, Suite G10, Lowell, MA 01879	\$5,000.00	11/23/2020	Funding to fund business planning focused on preparing preserved and value-added products from local produce to support its participant health beyond the growing season. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Mission Hill Health Movement, Inc.	1514 Tremont Street, Roxbury, MA 02120	\$5,000.00	3/2/2020	Funding to hire a grant writer to fundraise for the organization.
Catalyst Fund	Montachusett Veterans Outreach Center	268 Central Street, Gardner, Massachusetts 01440	\$5,000.00	4/15/2020	Funding to secure the services of a strategic planning consultant to design and implement an effective strategy.
Catalyst Fund	Paine Senior Services	3 Church St., Cambridge, MA 02138	\$5,000.00	4/15/2020	Funding to redesign the organization's website.
Catalyst Fund	Rebel Cause Inc	150 Avery Street, Springfield, Massachusetts 01119	\$5,000.00	8/27/2020	Funding to customize the exterior, obtain permits, train volunteers, and purchase equipment for a food truck to provide nutritious smoothies for people experiencing food insecurity and homelessness in Boston. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Revitalize Community Development	1145 Main Street, Suite 107, Springfield, MA 01103	\$5,000.00	10/6/2020	Funding to support operational needs such as hand scanners, tablets, program analysis, and shelving to store basic needs items for clients, as part of its emergency pandemic response. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Rian Immigrant Center	1 State Street, 8th Floor, Boston, Massachusetts 02109	\$5,000.00	5/28/2020	Funding to support an emergency relief fund for immigrant families amid the COVID-19 pandemic. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Ruth's Way For Women	25 Swan Avenue, East Boston, Massachusetts 02128-3210	\$3,000.00	3/27/2020	Funding to provide a Parenting Journey Facilitator training for three Board members who will learn group management and facilitation techniques to help women effectively care for and communicate with their children.
Catalyst Fund	Self Esteem Boston Educational Institute Inc.	8 Lakeville Road, Suite 3, Jamaica Plain, MA 02130, MA 02130	\$5,000.00	3/27/2020	Funding to hire a marketing consultant to help launch an online curriculum and training center.
Catalyst Fund	Sonali Development Center, Inc.	30 Malcolm X Boulevard, 2nd Floor, Roxbury, MA 02119	\$5,000.00	3/27/2020	Funding to purchase four computers that would help with client intake, enrollment and case management and furniture for the organization's conference room.
Catalyst Fund	The Boston Home	2049 Dorchester Avenue, Dorchester, MA 02124	\$5,000.00	4/22/2020	Funding to purchase personal protective equipment, cleaning supplies, health screeners, and supporting education administration.
Catalyst Fund	The Community Builders	185 Dartmouth Street, Boston, MA 02116	\$5,000.00	5/28/2020	Funding to provide supplies for households with young children that are home all day, including diapers, wipes, books, and educational toys and activities due to the closure of early education programs as a result of COVID-19. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	The Forsyth Institute	245 First Street, Cambridge, MA 02142-3200	\$5,000.00	10/6/2020	Funding to fund a tele-dentistry tool to reach youth who, due to the pandemic, have not had access to dental treatment. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	The Haven Project Inc.	57 Munroe Street, Lynn, MA 01901	\$5,000.00	6/24/2020	Funding to support immediate health and safety issues facing vulnerable young adults with housing instability during the pandemic, offering basic needs items, along with increased mental and physical health supports. They anticipate continued negative effects on clients' mental health and are actively building relationships with appropriate providers as well as encouraging active learning and personal growth during this time. This grant was made in response to the COVID-19 pandemic.

Full Proposal Record Type	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Catalyst Fund	The Joint Committee for Children's Health Care in Everett	484 Broadway, Room 27, Everett, MA 02149	\$2,700.00	10/6/2020	Funding to support communications enhancements for the website, social media, newsletters, text, and Zoom, supporting staff to better meet increased demand remotely. This grant was made in response to the COVID-19 pandemic.
Catalyst Fund	Treehouse Foundation	1 Treehouse Circle, Easthampton, MA 01027	\$5,000.00	5/28/2020	Funding to support the organization's COVID-19 Safe Together initiative with the purchase of food and essentials, staff training as well as programmatic activities for the multi-generational, supportive community to succeed while social distancing. This grant was made in response to the COVID-19 pandemic.
Community Resource Database Initiative	Massachusetts Association for Mental Health	50 Federal Street, Floor 6, Boston, Massachusetts 02110	\$263,000.00	4/29/2020	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	Boston Health Care for the Homeless Program	780 Albany Street, Boston, MA 02118	\$40,000.00	10/23/2020	Boston Health Care for the Homeless Program will 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, where it sees a large volume of patients with limited English language proficiency. It will also expand access to enrollment services at its Oasis Clinic, a dedicated clinic that incorporates a variety of services to meet the needs of immigrant and patients with limited English proficiency. At the clinic, it will inform patients about their health coverage, the requirements for retaining benefits, and provide advice for overcoming logistical barriers that homelessness brings in maintaining coverage. It will also include enrollment services on its outreach van in East Boston, which serves primarily immigrant and uninsured patients. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Boston Public Health Commission	1010 Massachusetts Avenue, Boston, MA 02118	\$45,000.00	10/23/2020	Boston Public Health Commission will strengthen and grow its impact and presence in communities with the highest rates of uninsured by scaling up successful outreach and enrollment strategies, including flyer and one-on-one counseling, as well as its multilingual enrollment assistance in the office and the community. It will also expand hours, collaborate with local businesses, leverage radio and social media to promote its services, and share information about open enrollment and plan selection periods. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients and staff.
Connecting Consumers with Care	Brookline Neighborhood Health Center	61 Main Street, Brookline, MA 02301	\$45,000.00	10/23/2020	Brookline Neighborhood Health Center, which serves a community with one of the state's highest number of uninsured residents, will partner with local organizations to expand its reach to specific populations, including immigrants, recently or chronically unemployed, residents recovering from substance use disorder, probationers and parolees. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Cambridge Economic Opportunity Committee	11 Roman Street, Cambridge, MA 02139	\$45,000.00	10/23/2020	Cambridge Economic Opportunity Committee (CEOC), which serves several communities with high rates of uninsured residents, will work to reduce barriers to obtaining insurance enrollment assistance by co-locating enrollment services where individuals live, or where they receive other services. CEOC will focus on locations where individuals who are more likely to be uninsured may frequent, such as food pantries, homeless shelters, single-room occupancy residences, English as a Second Language programs, cultural organizations, and job and career service programs. It will also bundle insurance enrollment assistance with its other programs, including the food pantry, Supplemental Nutrition Assistance Program (SNAP) enrollment, free tax preparation, as well as housing stabilization services. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients and staff.
Connecting Consumers with Care	Caring Health Center	1049 Main St, Springfield, MA 01103	\$45,000.00	10/23/2020	Caring Health Center, which serves a community with a high rate of uninsurance, will provide culturally competent insurance enrollment assistance and education to patients, including insurance eligibility, applications, enrollment, policies, subsidies and tax credits, plan selection, and assistance in maintaining coverage. Caring Health Center will increase health insurance literacy through culturally and linguistically appropriate education and community outreach, including to programs serving jobseekers, unemployed persons, students, and community members who need support outside of the health center. It will also implement extensive media and grassroots community outreach campaigns. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Community Action Committee of Cape Cod & Islands	372 North St., Hyannis, MA 02601	\$45,000.00	10/23/2020	Community Action Committee of Cape Cod & Islands (CACCI), which serves a community with a limited number of insurance plans and available providers, will provide education and ongoing support to consumers as they navigate the health care system and access services. CACCI works with organizations across the region to ensure that consumers enroll in and maintain coverage through advertising, cultural and ethnic events, health and human service providers, businesses, and outreach to specific populations, including immigrant communities. CACCI offers extended hours and tools in languages other than English to increase knowledge and to empower consumers to proactively maintain health care coverage and access the care they need. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients and staff.
Connecting Consumers with Care	East Boston Neighborhood Health Center	10 Gove Street, East Boston, MA 02128	\$45,000.00	10/23/2020	East Boston Neighborhood Health Center (EBNHC) serves one of the largest Latino populations in the state and several of the communities it serves have among the highest rates of uninsurance. EBNHC will conduct outreach in partnership with local community organizations, proactively assist with 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. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Ecu-Health Care, Inc.	99 Hospital Ave Suite 208, North Adams, BERKSHIRE 02147	\$45,000.00	10/23/2020	Ecu-Health Care will support clients in accessing and maintaining health insurance coverage through one-on-one education and outreach in partnership with local community organizations. It will also participate in a variety of outreach activities to build awareness of its services and to provide coverage information to consumers. It will disseminate information about coverage through social media, flyers, and brochures throughout the community, and will proactively outreach to uninsured Berkshire Medical Center patients to provide insurance enrollment support. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients and staff.
Connecting Consumers with Care	Edward M. Kennedy Community Health Center	650 Lincoln Street, Worcester, MA 01605	\$45,000.00	10/23/2020	Edward M. Kennedy Community Health Center will enhance partnerships with other community organizations in the region for outreach and enrollment services and it will increase visibility in the community where the most vulnerable clients are likely to congregate, including community centers, cultural events, and libraries. To better assist clients, the health center will implement a schedule to increase access to assistance. It will proactively provide clients with the tools they need to prevent lapses in coverage and will work with insurers to obtain lists of members who are up for renewal, supporting those patients in the re-determination process. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Family Health Center of Worcester, Inc.	26 Queen Street, Worcester, MA 01610	\$45,000.00	10/23/2020	Family Health Center of Worcester will focus insurance outreach and enrollment efforts towards refugee, immigrant, and asylum populations through clinics and community events, with an emphasis on dispelling misinformation, myths, and fears related to public charge. It will proactively outreach to patients who are newly uninsured as a result of a change in life circumstances and will hold new patient education sessions monthly in languages other than English. Family Health Center of Worcester will also conduct ongoing reviews of information collected from Health Insurance Literacy surveys and provide group learning opportunities for its navigators to identify and address themes and content for staff training. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Greater New Bedford Community Health Center	874 Purchase Street, New Bedford, MA 02740	\$45,000.00	10/23/2020	Greater New Bedford Community Health Center, which serves a community with a high rate of uninsurance, will provide screening, education, enrollment, and post-enrollment services for patients and community residents, including information on how to maintain insurance coverage. It will also attend community events and partner with the Immigrant Assistance Center to inform individuals about the insurance application process and to answer questions about public charge. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	Lowell Community Health Center	161 Jackson Street, Lowell, MA 01852	\$45,000.00	10/23/2020	Lowell Community Health Center, which serves a community with a high rate of uninsurance, will strengthen 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. It will increase efficiencies to improve patient access to health insurance benefits services and it will increase its capacity to formalize tracking systems for its patients to address churn. Lowell Community Health Center will increase timely, culturally and linguistically appropriate guidance to assist clients in making informed decisions and maintaining health insurance. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.

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Connecting Consumers with Care	The Dimock Center	55 Dimock Street, Roxbury, MA 02119	\$45,000.00	10/23/2020	The Dimock Center, which serves a community with a high rate of uninsurance, will strengthen its capacity to provide health insurance outreach and enrollment services, ensuring that its clients gain knowledge about coverage options as well as how to access and navigate the health care system. The Dimock Center will focus on clients with substance use disorder, specifically those seeking to and who are currently accessing services at its inpatient detox and residential recovery homes. These clients are often disconnected from the health care system, including health insurance coverage, therefore the Dimock Center will enhance its services to ensure that clients interested in participating in these programs are connected with financial counselors to enroll in, maintain coverage. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients, patients, and staff.
Connecting Consumers with Care	The Joint Committee for Children's Health Care in Everett	484 Broadway, Room 27, Everett, MA 02149	\$45,000.00	10/23/2020	The Joint Committee for Children's Health Care in Everett assists clients, many from immigrant, multilingual, and multicultural backgrounds, to understand health insurance coverage options and how to access services. It coordinates enrollment events across different settings and provides focused outreach to specific populations, including children aging out of parents' household coverage. It will also attend community events and distribute flyers throughout the service area at venues such as service agencies, ethnic small businesses, laundromats, libraries, parks and places of worship including virtually and through social media. Through 2021, specific grant plans may be adjusted to meet the current health and safety guidelines to protect the wellbeing of clients and staff.
Expanding Access to Behavioral Health Urgent Care	Bay Cove Human Services	66 Canal Street, Boston, MA 02114	\$200,000.00	12/15/2020	Bay Cove Human Services Cape Cod Emergency Services Program (CCESP) will 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 program will increase outreach efforts to support individuals with urgent crises before they become emergencies, including regular ride alongs with police departments to proactively identify emerging crises at an earlier stage and to encourage more police departments to call the ESP in at the first sign of constituent in distress.
Expanding Access to Behavioral Health Urgent Care	Boston Medical Center	One Boston Medical Center Place, Boston, MA 02118	\$200,000.00	12/15/2020	Boston Medical Center will 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 Behavioral Health Urgent Care	Clinical and Support Options, Inc.	8 Atwood Dr., Northampton, MA 01060	\$200,000.00	12/15/2020	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 Behavioral Health Urgent Care	Community Healthlink, Inc.	72 Jaques Avenue, Worcester, MA 01610	\$200,000.00	12/15/2020	Community Healthlink will continue the integration of its substance use disorder program with its mental health services. The program will implement its medication-assisted treatment (MAT) program for both long and short term use, provide case management and follow-up services with clients who come to Behavioral Health and Addiction Urgent Care for either mental health or substance use disorder treatment; and continue to strengthen its collaboration with local police departments and health and human services providers.
Expanding Access to Behavioral Health Urgent Care	Northeast Behavioral Health Corporation D/B/A Lahey Behavioral Services	41 Mall Road, Lahey Health Philanthropy Office, Burlington, MA 01805	\$200,000.00	12/15/2020	Lahey Health Behavioral Services will continue implementation of telemedicine for psychiatric prescribing and consultation to its Urgent Care Clinic, initiate medication-assisted treatment (MAT) via telepharmacy, and implement a crisis management program to facilitate communication among members of an individual's care team.
Expanding Access to Behavioral Health Urgent Care	The Brien Center for Mental Health and Substance Abuse Services	P.O. Box 4219, Pittsfield, MA 01201	\$200,000.00	12/15/2020	Brien Center will increase community-based locations with behavioral health urgent care (BHUC) and increase operating hours, including 24/7/365 staffed BHUC. Brien Center's BHUC program will also serve as a bridge between an individual's emergency services assessment and the connection to outpatient services. The Center will increase its focus on working with all local police departments, the Massachusetts State Police, and other sources to encourage appropriate direct referral and transport to community-based behavioral health urgent care rather than the Emergency Department.
Going Beyond Health Care 2019	Metro Housing Boston	1411 Tremont Street, Boston, Massachusetts 02120-3401	\$75,000.00	12/15/2020	Metro Housing Boston, in partnership with Boston Medical Center (BMC), is serving 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 will develop infrastructure for sustainable and efficient data sharing across the two organizations.
Going Beyond Health Care 2019	The Community Builders	185 Dartmouth Street, Boston, MA 02116	\$75,000.00	12/15/2020	The Community Builders (TCB), in partnership with the Family Health Center of Worcester, Worcester Addresses Childhood Trauma (Worcester ACT), the Regional Environmental Council (REC) Clark University, and Boston College, is working to understand and document the connections between trauma and housing instability. The partner organizations are integrating trauma-informed services, supports, and property management protocols to assist residents in maintaining housing stability. Trauma-informed care-trained Community Life staff and resident Health Champions support residents by providing resources and education through group information sessions and other community-based activities. They also provide referrals to needed services, including emergency and ongoing support with Worcester ACT, trauma treatment through Family Health Center of Worcester, food access through the REC, and eviction prevention services. To support these activities, TCB is increasing its capacity by supporting ongoing training and coaching for staff, developing leadership opportunities for residents, and reviewing and adapting the infrastructure necessary for this cross-sectoral partnership to be sustained.
Policy and Research	Massachusetts Law Reform Institute (MLRI)	40 Court Street, Suite 800, Boston, MA 02108	\$15,000.00	4/22/2020	Funding solely develop a centralized resource that documents and describes key changes in programs and/or policies resulting from COVID-19 that pertain to MassHealth, the Health Safety Net, and the Health Connector. MLRI will leverage information it has compiled for the legal services community to develop a resource for a general audience that highlights and explains policies intended to promote continuity and access to health coverage and access to health care services during this pandemic. The resource will be focused on those policies and programmatic changes impacting consumers; it will not cover provider-focused changes such as new credentialing requirements, billing codes, reimbursement rates, etc., unless there is a direct, corollary impact from these types of changes on consumers. This resource will be regularly updated to ensure relevance and accuracy of information. It will be co-branded by MLRI and the BCBSMA Foundation and available on the BCBSMA Foundation website.
Special Initiatives	Bridge Over Troubled Waters	47 West Street, Boston, MA 02111	\$50,000.00	4/29/2020	Bridge Over Troubled Waters will train four counselors in Dialectical Behavior Therapy (DBT) and establish DBT groups for homeless youths. DBT teaches methods to accept and tolerate negative emotions as opposed to just focusing on the alteration and dissolution of negative emotions. DBT imparts young adults with critical behavioral skills to utilize independently, in order to increase focus on long-term aspirations, finishing their education, securing a job, and attaining housing.
Special Initiatives	Essex County Community Organization	24 S. Common Street, Lynn, MA 01902	\$12,500.00	12/16/2020	Essex County Community Organization will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.
Special Initiatives	Family Health Center of Worcester, Inc.	26 Queen Street, Worcester, MA 01610	\$13,570.00	12/16/2020	Family Health Center of Worcester will develop a formal plan to install a telehealth console on the Community Builders property, increasing access to primary care and behavioral health services for households without access to the internet or technology in their home. This grant is made in relationship to the Going Beyond Health Care grant program.
Special Initiatives	GreenRoots, Inc.	227 Marginal Street, Suite 1, Chelsea, MA 02150	\$12,500.00	12/16/2020	GreenRoots will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.
Special Initiatives	Health Imperatives, Inc.	942 West Chestnut Street, Brockton, MA 02301	\$12,500.00	12/16/2020	Health Imperative will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.
Special Initiatives	Massachusetts League of Community Health Centers	40 Court Street, 10th Fl., Boston, MA 02108	\$20,000.00	12/16/2020	Funding to support the development of The Health Equity Task Force Final Report to the Legislature by the end of February 2021 or such other date determined by the Legislature. The Deputy CEO of the League, Michael Curry, is the co-chair of the Task Force and has offered the League as the fiscal sponsor for this grant. The Health Equity Task Force was established by the Massachusetts Legislature through Chapter 93 of the Acts of 2020 to study and make recommendations to the general court that address health disparities for underserved or underrepresented populations based on culture, race, ethnicity, language, disability, gender identity, sexual orientation, geographic location, including but not limited to, gateway cities with hospitals dedicated to caring for patients who test positive for COVID-19, and age in the Commonwealth during the COVID-19 pandemic.
Special Initiatives	Public Health Institute of Western MA	127 State Street, 4th Floor, Springfield, MA 01103	\$12,500.00	12/16/2020	Public Health Institute of Western Massachusetts will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.

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Special Initiatives	Regional Environmental Council, Inc.	9 Castle Street #1, Worcester, MA 01610	\$15,096.00	12/16/2020	The Regional Environmental Council will bring fresh, local produce to the Community Builders properties and will develop a no/low contact mobile pre-order model to ensure safe and uninterrupted access to healthy foods. It will provide culturally and linguistically responsive training to increase access to food security resources including the Supplemental Nutrition Assistance Program (SNAP) and the state's Healthy Incentives Program (HIP). This grant is made in relationship to the Going Beyond Health Care grant program.
Special Initiatives	United Teen Equality Center	15 Warren Street #3, Lowell, MA 01852	\$50,000.00	4/29/2020	United Teen Equality Center (UTEC) will support the Circling Home pilot project, a new comprehensive behavioral health project for incarcerated and/or probation and parole-involved young adults (ages 18-25), extending from pre- to post-release without interruption in service or care provider. UTEC serves young people who have not succeeded in other shorter-term programming or who may have been underserved by the judicial system; many of their clients have active substance use issues or are diagnosed with a mental illness. By improving the continuum of care through the reentry process, UTEC expects to improve recidivism and health outcomes.
Special Initiatives	Volunteers in Medicine Berkshires	777 Main Street, Suite 4, Great Barrington, Massachusetts 01230	\$12,500.00	12/16/2020	Volunteers in Medicine Berkshires will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.
Special Initiatives	William James College (formerly MSPP)	One Wells Avenue, Newton, MA 02459	\$50,000.00	4/29/2020	William James College will pilot the Behavioral Health Service Corps (BHSC) program that will engage 20-25 recent college graduates who wish to spend a year learning about and working in behavioral health organizations. BHSC scholars will become employees of behavioral health host organization in inpatient units, home-based services, residential treatment, and recovery centers, among others. A key focus of this project is to both diversify and grow the behavioral health workforce.
Special Initiatives	YWCA of Central Mass	One Salem Square, Worcester, MA 01608	\$12,500.00	12/16/2020	The YWCA Central Massachusetts will assist the BCBSMA Foundation staff in conducting a focus group to understand the needs, concerns, and challenges facing organizations of color and organizations working in communities of color. The focus group will also help the Foundation identify potential solutions to change the systems, policies, and structures that perpetuate racial inequities in health in Massachusetts.
Special Initiatives COVID-19	Advocates, Inc.	1881 Worcester Road, Framingham, MA 01701	\$25,000.00	5/15/2020	Advocates will purchase Zoom accounts, computer monitors, laptops, and printers for six recently hired bilingual clinicians to expand access to behavioral health care for low-income Latino individuals and families. Funding will also provide equipment to two medical assistants to improve their efficiency when scheduling appointments and updating client charts. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Casa Esperanza, Inc.	302 Euclid Street, Roxbury, MA 02119	\$25,000.00	10/7/2020	Casa Esperanza will maintain and expand its telehealth infrastructure and build staff resilience to better support patients. It will hire bilingual clinical facilitators to enhance and sustain their successful groups for staff to process trauma and stress related to pandemic care. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	East Boston Neighborhood Health Center	10 Grove Street, East Boston, MA 02128	\$25,000.00	5/15/2020	East Boston Neighborhood Health Center, in collaboration with the Chelsea Senior Center, will expand and sustain COVID food delivery services to include medications and pharmacy goods. Partnering medication and pharmacy goods with its food deliveries will benefit the individual health of the patients receiving necessary medications while also working to stop the community spread of COVID by allowing patients to stay at home. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Family Services of the Merrimack Valley	430 North Canal Street, Lawrence, MA 01840	\$25,000.00	10/7/2020	Family Services of the Merrimack Valley will provide emotional health workshops, enhanced case management, and expanded crisis helpline services, and will facilitate community-wide emotional wellness resources. These services are designed to help residents access support services and provide them with skills to be resilient in the face of this ongoing crisis. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	Fathers' Uplift, Inc.	12 Southern Ave, Dorchester, Massachusetts 02124	\$25,000.00	5/15/2020	Fathers' Uplift will purchase grocery store gift cards for families in need of food and other supplies, increasing the ability of fathers and families to address mental health concerns by providing resources to lessen the stressors associated with their physical and financial health. Funding will also cover expenses associated with implementing remote counseling and therapy services. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Hilltown Community Health Center	58 Old North Road, Worthington, MA 01098	\$25,000.00	5/15/2020	Hilltown Community Health Center will increase staff time for patient navigators and community health workers, along with obtaining Community Sustainable Agriculture shares for food insecure patients. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Immigrant Family Services Institute (IFSI-USA)	575 American Legion Highway, Rosindale, MA 02131	\$25,000.00	10/7/2020	Immigrant Family Services Institutes will build a sustainable program to provide counseling and case management to community members experiencing social and emotional difficulties. Through training and technical assistance, service providers will be educated on Haitian mental health needs and stigmas and on best practices for promoting individual and community-wide mental health. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	La Alianza Hispana, Inc.	409 Dudley Street, Roxbury, MA 02119	\$25,000.00	5/15/2020	La Alianza Hispana will support telehealth services for seniors through the Aliancianos Senior Center. It will also provide tiered telehealth services for families with children age 0-5 through their Madres y Niños program. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Lowell Community Health Center	161 Jackson Street, Lowell, MA 01852	\$25,000.00	5/15/2020	Lowell Community Health Center will provide multi-cultural communication and outreach efforts with a focus on immigrant and communities of color and expand its capacity for medical interpretation to ensure that patients are referred to trusted partners to address identified health-related social needs. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Martha's Vineyard Community Services, Inc.	111 Edgartown Road, Vineyard Haven, MA 02568	\$25,000.00	5/15/2020	Martha's Vineyard Community Services will help meet a dramatic increase in client requests for emergency assistance for basic needs, such as rent, diapers, supplies, and other health-related social needs. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Massachusetts Coalition for the Homeless	75 Buffum Street, Lynn, MA 01902	\$25,000.00	5/15/2020	Massachusetts Coalition for the Homeless will continue to partner with Lynn Community Health Center to assist referred families with food and housing assistance and develop a short- and long-term plan for continuing to address their health-related social needs. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Multicultural AIDS Coalition	7 Palmer Street, Roxbury, Massachusetts 02119	\$25,000.00	10/7/2020	Multicultural AIDS Coalition will address the gap in culturally appropriate COVID-19 education, prevention, and support services in response to the disproportionate impact of the pandemic on communities of color and among immigrant communities. These communities may also be experiencing trauma, domestic violence, racial discrimination, HIV status, along with health-related social needs. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	Rian Immigrant Center	1 State Street, 8th Floor, Boston, Massachusetts 02109	\$25,000.00	10/7/2020	The Rian Immigrant Center's Wellness Program will expand its services to include a Spanish speaking case manager to increase its capacity to serve more Spanish speakers who need mental health supports. The case manager will also provide crisis intervention. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	Roca, Inc.	101 Park Street, Chelsea, MA 02150	\$25,000.00	10/7/2020	Roca, Inc. will transition its innovative approach to behavioral health for young adults so that interactive cognitive-behavioral theory (CBT) and educational training can be delivered virtually. It will also work to combine its skills in engagement, outreach, and CBT with the more traditional skills of Community Health Workers and Therapeutic Mentors, to maximize the number of young people engaged and retained in appropriate levels of both non-clinical and clinical care. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	Samaritans, Inc.	41 West Street, 4th Floor, Boston, MA 02111	\$25,000.00	5/15/2020	Samaritans, Inc. will upgrade their video conference and webinar capacities to conduct virtual workshops for youth and their caregivers. Samaritans will focus these workshops on individuals in communities experiencing health inequities who are particularly vulnerable during these challenging times. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	The Food Bank of Western Massachusetts	97 N. Hatfield Rd.	\$25,000.00	5/15/2020	The Food Bank of Western Massachusetts, in partnership with Holyoke Community Health Center and other health care providers in Holyoke and Springfield, will screen and match food insecure community members with counseling, referrals, emergency food and other non-food resources to address the social determinants of health. This grant was made in response to the COVID-19 pandemic.
Special Initiatives COVID-19	Trinity Boston Connects	206 Clarendon Street, Boston, MA 02116	\$25,000.00	10/7/2020	Trinity Boston Connects will provide clinical services for youth workers who experience road barriers to accessing therapy and are experiencing a decline in mental health care access due to significant changes in their routine, family income, or from being unemployed due to the pandemic. This grant was made in response to COVID-19 pandemic.
Special Initiatives COVID-19	YMCA of Metro North	2 Centennial Drive #46, Peabody, MA 01960	\$25,000.00	10/7/2020	YMCA of Metro North will support the Lynn Youth Mental Health Collaborative, a partnership between the Lynn YMCA and Lynn Community Health Center. The partnership will include the following components: a Youth Mental Health Clinic, embedded Trauma-Informed Care practices in all Lynn YMCA Youth Programs; resource-sharing fairs to connect families to outside services; and a "Go for the Y" providing parents with free memberships to increase physical activity. This grant was made in response to COVID-19 pandemic.
Strengthening the Voice for Access	Boston Center for Independent Living	60 Temple Place, 5th Floor, Boston, MA 02111	\$60,000.00	10/23/2020	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 (DAHAR) Coalition, focusing on social determinants of health.

Full Proposal Record Type	Organization Name	Organization Address	Amount Awarded	Award Date	Internal Reason for Decision
Strengthening the Voice for Access	Disability Policy Consortium	11 Dartmouth Street, Suite 301, Malden, MA 02148	\$60,000.00	10/23/2020	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 DAHR, and an expanded social media presence.
Strengthening the Voice for Access	Health Care For All	One Federal Street, 5th Fl., Boston, MA 02110	\$75,000.00	10/23/2020	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 (ACTH) 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	Health Law Advocates	One Federal Street, Boston, MA 02110	\$65,000.00	10/23/2020	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	Massachusetts Association for Mental Health	30 Federal Street, Floor 6, Boston, Massachusetts 02110	\$75,000.00	10/23/2020	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 policy 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 Immigrant and Refugee Advocacy Coalition	105 Chauncy St, Suite 901, Boston, Massachusetts 02111	\$65,000.00	10/23/2020	Massachusetts Immigrant and Refugee Advocacy (MIRA) will work to defend and expand funding and access to health coverage for immigrant and refugee populations in Massachusetts. In addition to advocacy regarding state-level policies, MIRA will work with national partners to expand health access to all immigrants. To this end, MIRA aims to initiate a long-term campaign in partnership with the National Immigration Law Center. They will also work with additional coalition partners to end restrictions to coverage for DACA grantees.
Strengthening the Voice for Access	Massachusetts Law Reform Institute (MLRI)	40 Court Street, Suite 800, Boston, MA 02108	\$75,000.00	10/23/2020	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 League of Community Health Centers	40 Court Street, 10th Fl., Boston, MA 02108	\$60,000.00	10/23/2020	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 findings to policymakers, state agencies, member organizations, and other advocacy groups. Additional priorities will include increasing the League's capacity for grassroots advocacy work and improving health literacy among patients at community health centers.
Strengthening the Voice for Access	Massachusetts Organization for Addiction Recovery, Inc.	105 Chauncy Street 6th Floor, Boston, Massachusetts 02111	\$60,000.00	10/23/2020	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 Public Health Association	30 Federal Street, 8th Floor, Boston, MA 02110	\$60,000.00	10/23/2020	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
Strengthening the Voice for Access	Massachusetts Senior Action Council	108 Myrtle Street, Suite 112, Quincy, MA 02271	\$60,000.00	10/23/2020	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				\$3,877,194.00	