



# GIVING MASSACHUSETTS

A Report on Philanthropy Trends | 2020



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## Acknowledgements

A report of this magnitude doesn't happen without a lot of help. We would especially like to thank our partners at **The Boston Foundation** who provided thought leadership and grant funding enabling us to expand the scope of this report. We would also like to extend our gratitude to:

- Reina Mukai, Davis Parchment, Katherine Neiheisal & Nicholas Savot, our partners at Candid who were essential in gathering data and supporting the report's development from start to finish.
- Gail Pinkham, our Senior Director of Communications, who was instrumental in pulling together the different components of this report and facilitating the editing process.
- Nancy Cowen, our talented designer who brought to life the data featured in this report.
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- Our many Members that responded to calls to e-report their data. We were able to triple the number of e-reporters in advance of this report leading to a higher level of quality data.
- All our Future of Philanthropy campaign and 50th Anniversary supporters who enabled us to take on a project of this scope. For a complete list, please visit [philanthropyma.org/support](http://philanthropyma.org/support).

We would be remiss if we didn't single out Nikita Singhal and Georganna Woods. As the primary researcher and author, Nikita's skill, efficiency and graciousness have been at the center of this report since May 2019. Georganna, our long-term Research Associate at Philanthropy Massachusetts was an early conceiver and cheerleader for this report. Her deep understanding of data, reporting and our sector has grounded this work.



A report of this magnitude doesn't happen without a lot of help.

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## MESSAGE FROM THE CEO



**During my ten-year tenure at Philanthropy Massachusetts,** I have often been called upon to share insights about philanthropy in our region. I usually cite general trends such as a stronger focus on general operating support or taking a trust-based philanthropy approach; alternatively, I might note pressing issues in the given year. But we have long felt that the region would benefit from more than my anecdotal (albeit I like to think informed) observations. In 2005, when we went by Associated Grant Makers, we issued a brief Giving in Massachusetts report but haven't returned to one since then. Until now.

**We hope Giving Massachusetts 2020 will provide a baseline understanding of giving BY Massachusetts, TO Massachusetts, and even within each county, and that we can return to this type of report periodically to share an update of patterns over time.**

We all know that how you slice and dice the data can be subjective. The focus of this report is foundation giving. While it is common knowledge that individual giving makes up the vast majority of charitable giving in the U.S. (and Massachusetts is no different), there is little tracking and depth of knowledge on individual giving at this time. This report primarily focuses on foundation giving in 2017, the most recent year for which there is a near complete dataset. We recognize that 2020 is already dramatically different than 2017 as giving has surely shifted due to COVID-19. We anticipate juxtaposing data in this report to that of future years to understand changes in giving over time and in response to the worldwide pandemic.

We invite you to share your perspective and reactions to this report. We hope to revisit this project every few years and would like to build on what we learn this go-around. While it won't be perfect out of the gate, we believe it will set the stage for many more learning opportunities and conversations about philanthropy in our region. We look forward to having those with you as we go forth!

Best,  
Jeff Poulos  
CEO, Philanthropy Massachusetts



Giving MA 2020  
will provide  
a baseline for  
looking at data  
and trends.



## METHODOLOGY & DATA LIMITATIONS

To gather grantmaking data for the report Philanthropy Massachusetts conducted outreach to foundations, providing instructions and guidance to facilitate data submission to Candid. As the premier repository of foundation giving, Candid played a critical role in data collection, organization and analysis for this report. When grantors self-report data to Candid they ensure their organization's work and subsequent regional trends are presented accurately to the public, allowing the greater philanthropic community to make informed grantmaking decisions moving forward.



# METHODOLOGY & DATA LIMITATIONS



## Giving by Massachusetts-Based Foundations

is based on Candid's grantmaker database. The section measures MA-based grantmakers by number, assets, and total giving to examine their growth and distribution, as well as their resources. Candid identified 3,481 MA-based independent, corporate, community, and operating foundations and used the total giving and assets collected for these foundations to provide the data in this section. Most foundations are represented with fiscal year 2017 data. Foundations for which data was unavailable at the time of publication are represented with 2016 or 2018 fiscal year data. Sources of data include the Form 990-PF for private foundations and Form 990 for community foundations.

For a comprehensive understanding of giving in MA, we made decisions around how best to filter and present data. Each of the report's main sections are primarily based on 2017 data but use different datasets. **Due to small discrepancies between these sources, data may differ across sections or to present-day data available on Candid's database.**

## Giving to Massachusetts-Based Recipients

is based on Candid's grants database. These grants are indexed according to Candid's Philanthropy Classification System, a glossary of terms used to describe and catalog the nature and focus of each grant. Analysis of the fiscal year 2017 philanthropic giving to MA includes a national sample of 9,708 funders including 1,895 MA foundations that awarded at least one grant of \$1,000 or more to a MA-based recipient organization. Dollar amounts may represent the full authorized grant award, or the amount paid in that year, depending on how the foundation reports its activity. Grants awarded to private and community foundations have been excluded from the analysis to prevent double counting of grants. The sources of grants data include the Form 990-PF for Private Foundations and Form 990 for community foundations and grantmaking public charities; grants reported directly to Candid by funders; foundation websites and other sources (e.g. news, press releases, or data through partner organizations).

**State and County Trends** is based on data in Candid's *Foundation Maps* in January of 2020. The data includes 2017 philanthropic giving by grantmakers located anywhere – in or out of MA – to recipients located in the specified MA county. The total dollar value of grants for each county is depicted through 1) the total dollar amount (as seen in the database); and 2) the total dollar amount excluding grants to private and community foundations and higher education to demonstrate the amount of funding reaching the broader community.



Presenting this data with and without these exclusions is necessary.

## What is the purpose of excluding certain grants from this analysis?

In 2017, total giving in MA was **\$4.7 billion**. When excluding grants to private and community foundations and those to higher education institutions, this amount reduces to **\$3.1 billion**. Presenting this data with and without these exclusions is necessary to add nuance to the story of giving in MA.

**Grants to private & community foundations** are excluded from datasets, where noted, because intermediary organizations that act as both recipients and funders may re-grant funding, resulting in double-counting of grants. *For example*, if organization A gives \$100K to organization B, a private or community foundation, which then grants the \$100K to education-related work, then Candid would capture that as \$200K towards education rather than \$100K, which is the actual amount received by the community.

**Grants to higher education institutions** are excluded from datasets, where noted, due to the large proportion of funds directed to MA colleges and universities. *For example*, total grantmaking funding received by Hampshire County in 2017 was \$110 million; however, excluding higher education reduces this amount to \$57 million.

## GIVING BY MASSACHUSETTS-BASED FOUNDATIONS

This section examines how foundations in the state have fared relative to U.S. foundations over the past decade and provides an overview of the scale and composition of the Massachusetts foundation community.

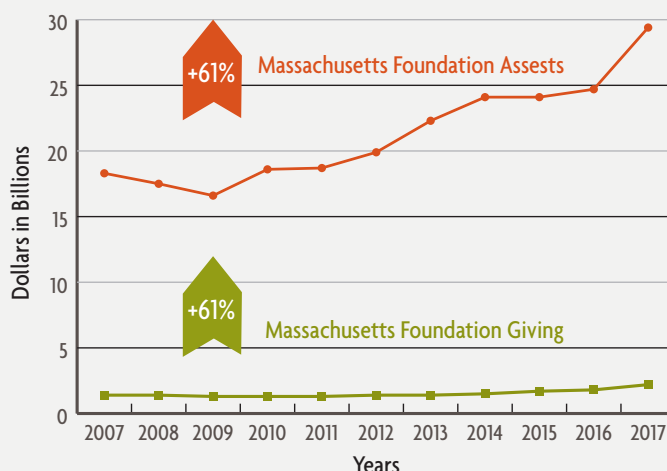


# GIVING BY MASSACHUSETTS-BASED FOUNDATIONS

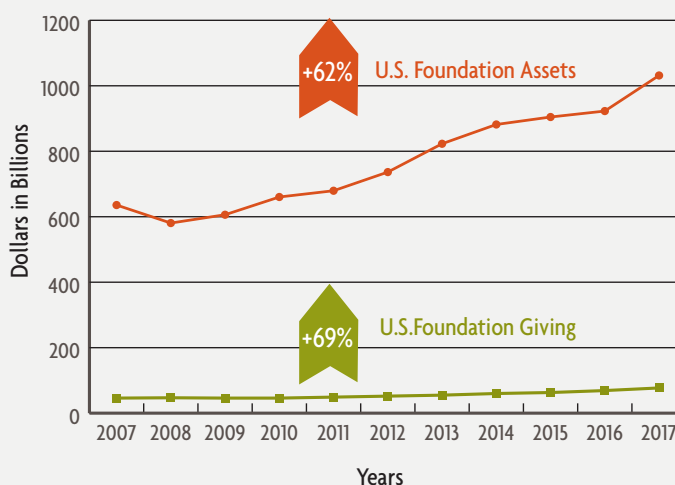


**In 2017, Massachusetts foundation assets reached peak levels at \$29.4 billion and giving surpassed \$2.0 billion.** MA-based foundations showed strong growth from 2015-2017, increasing from \$1.7 billion to \$2.2 billion. Over the ten-year period, both MA foundation assets and giving increased by 61%. In comparison, foundations nationwide experienced a 62% increase in assets and 69% rise in giving (from \$45.6 billion to \$77.2 billion).

Change in MA Foundation Assets and Giving, 2007-2017<sup>1</sup>



Change in U.S. Foundation Assets and Giving, 2007-2017<sup>1</sup>



## INDIVIDUAL GIVING

Internal Revenue Department data indicated that individual giving by MA residents in 2017 totaled \$6.8 billion (to recipients located within and outside the state), exceeding any other sources of giving.<sup>2</sup> According to Giving USA's Annual Report, individual giving on a national-level amounted to \$286.7 billion, making up 70% of all giving in the country. Foundation giving amounted to about \$67 billion (or 16% of total giving in the U.S.) in 2017.<sup>3</sup>

## TOP 20

### MA-Based Foundations by Total Giving, 2017

Foundation Name	Total Giving *
1. The Patrick J. McGovern Foundation	\$216.6
2. The Boston Foundation	\$108.4
3. Morningside Foundation	\$108.4
4. Adelson Family Foundation	\$89.1
5. Barr Foundation	\$76.4
6. The Rare Disease Charitable Foundation	\$74.8
7. Klarman Family Foundation	\$46.4
8. One8 Foundation	\$29.4
9. Dr. Miriam and Sheldon G. Adelson Medical Research Foundation	\$28.3
10. Grantham Foundation	\$22.6
11. Sumner M. Redstone Charitable Foundation	\$22.0
12. The Liberty Mutual Foundation	\$20.3
13. Yawkey Foundation II	\$20.2
14. The Kraft Family Foundation	\$18.9
15. State Street Foundation	\$17.6
16. Phillip and Susan Ragon Foundation	\$17.1
17. The Harold Whitworth Pierce Charitable Trust	\$16.5
18. Dentaquest Foundation	\$14.6
19. The TJX Foundation	\$13.9
20. Richard & Susan Smith Family Foundation	\$12.5

\* in millions

## TOP 20

### MA-Based Foundations by Total Assets, 2017

Foundation Name	Total Assets*
1. Barr Foundation	\$1700.0
2. Cummings Foundation	\$1320.5
3. The Boston Foundation	\$1115.3
4. The Patrick J. McGovern Foundation	\$944.6
5. Klarman Family Foundation	\$805.8
6. The Clifford Family Foundation Charitable Trust	\$722.3
7. The Flatley Foundation	\$650.0
8. Lincoln Institute of Land Policy	\$602.4
9. One8 Foundation	\$588.3
10. Grantham Foundation	\$582.3
11. Yawkey Foundation II	\$466.6
12. OneWorld Boston	\$436.2
13. Edward P. Evans Foundation	\$303.1
14. Richard & Susan Smith Family Foundation	\$286.9
15. China Medical Board	\$238.2
16. The George I. Alden Trust	\$215.4
17. Swartz Foundation	\$201.1
18. Phillip and Susan Ragon Foundation	\$195.8
19. Ruderman Family Foundation	\$183.6
20. Shipley Foundation	\$181.3

\* in millions

## MASSACHUSETTS IS HOME TO 3,173 Independent Foundations 136 Corporate Foundation 16 Community Foundations and 156 Operating Foundations

Candid uses the following classification system to categorize foundations by type:

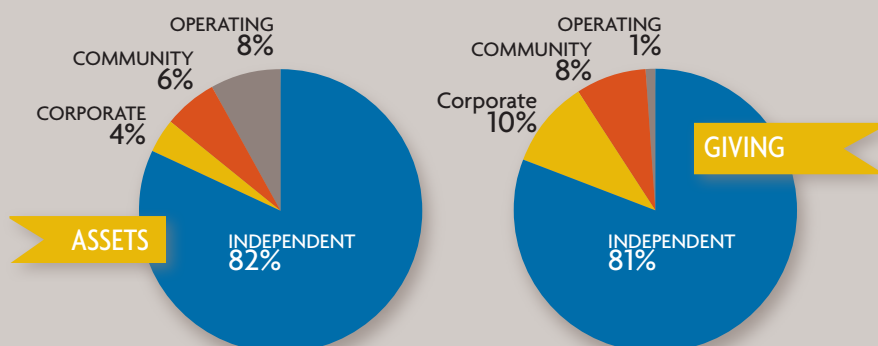
**Independent Foundation:** An organization with funds and programs managed by trustees or directors and established to maintain or aid charitable activities, generally serving the common welfare by making grants. Independent foundations may also be known as family, general purpose, special purpose or private non-operating foundations.

**Company-sponsored (Corporate) Foundation:** A foundation whose assets are derived primarily from the contributions of a for-profit business. While a company-sponsored foundation may maintain close ties with its parent company, it is an independent organization with its own endowment and is subject to the same rules and regulations as other private foundations.

**Community Foundation:** An organization that makes grants for charitable purposes in a specific community or region. The funds available to a community foundation are usually derived from many donors and held in an endowment that is independently administered.

**Operating Foundation:** A foundation whose primary purpose is to conduct research or run social programs determined by its governing body or establishment charter. An operating foundation may make grants, but the amount awarded is generally small relative to the funds used for the foundation's own programs.

### Summary Statistics for Massachusetts Foundations by Type, 2017<sup>1</sup>



Type	Assets*	Total Giving*
Independent	\$24.1	\$1.8
Corporate	\$1.1	\$.21
Community	\$1.9	\$.19
Operating	\$2.4	\$.02

\* in billions



**9 out of 10 foundations in Massachusetts are independent foundations.** This includes the state's largest foundation by assets, the Boston-based Barr Foundation, as well as Patrick J. McGovern Foundation, which ranked first in 2017 for total giving in MA.

## TOP 20

### MA-Based Independent Foundations by Total Giving, 2017

Foundation	Total Giving*
1. The Patrick J McGovern Foundation	\$216.6
2. The Morningside Foundation	\$108.4
3. Adelson Family Foundation	\$89.1
4. Barr Foundation	\$76.4
5. Klarman Family Foundation	\$46.4
6. One8 Foundation	\$29.4
7. Dr. Miriam and Sheldon G. Adelson Medical Research Foundation	\$28.3
8. Grantham Foundation for the Protection of the Environment	\$22.6
9. Sumner M. Redstone Charitable Foundation	\$22.0
10. Yawkey Foundation II	\$20.2
11. The Kraft Family Foundation	\$18.9
12. Phillip and Susan Ragon Foundation	\$17.1
13. The Harold Whitworth Pierce Charitable Trust	\$16.5
14. Richard & Susan Smith Family Foundation	\$12.5
15. The John Merck Fund	\$12.4
16. Highland Street Foundation	\$11.7
17. Flatley Foundation	\$11.2
18. Edward P. Evans Foundation	\$10.5
19. George I. Alden Trust	\$10.2
20. High Meadows Foundation	\$10.1

\* in millions

**Massachusetts corporate foundations account for 10% of grant dollars, and report total giving of \$213 million in 2017.** The 10% share of overall giving in the state exceeded the 8% share recorded nationally among corporate foundations. While 136 MA-based corporate foundations made grants in the last year, giving was highly concentrated among the largest funders.

## TOP 20

### MA-Based Corporate Foundations by Total Giving, 2017

Foundation	Total Giving*
1. The Rare Disease Charitable Foundation	\$74.8
2. Liberty Mutual Foundation	\$20.3
3. State Street Foundation	\$17.6
4. Dentaquest Partnership for Oral Health Advancement	\$14.6
5. The TJX Foundation	\$13.9
6. New Balance Foundation	\$7.0
7. MassMutual Foundation	\$7.0
8. The New England Patriots Charitable Foundation	\$5.6
9. University Industry Research Corp.	\$5.5
10. Eastern Bank Charitable Foundation	\$5.2
11. Blue Cross Blue Shield of Massachusetts Foundation	\$3.5
12. The Hanover Insurance Group Foundation	\$2.2
13. Berkshire Bank Foundation	\$2.0
14. Arbella Insurance Foundation	\$1.9
15. Staples Foundation	\$1.9
16. Bristol County Savings Charitable Foundation	\$1.8
17. Demoulas Market Basket Foundation	\$1.5
18. The Elsevier Foundation	\$1.3
19. LPL Financial Charitable Foundation	\$1.2
20. Institution for Savings Charitable Foundation	\$1.2

\* in millions



## DONOR-ADVISED FUNDS (DAF)

Giving through Donor-Advised Funds (DAF) has been on the rise over the past decade, notably in community foundations and grantmaking public charities. A DAF is a charitable account of an individual, family or organization that offers immediate tax benefits as well as the flexibility to give grants over time. Unlike private foundations that are required to spend 5% of their assets per year, DAF have no such requirements (but tend to payout close to 20%).<sup>4</sup> In 2017, the National Philanthropic Trust estimated that 463,622 DAFs exist across the country, a 60% rise from 2016. Charitable assets amounted to \$110 billion, providing a total of \$19 billion in grants.<sup>5</sup> Data collected from major DAF sponsors indicates that DAF giving aligns with national trends in prioritizing subjects of religion, education, and human services.<sup>3</sup>

**Massachusetts is home to 16 community foundations that collectively held \$1.9 billion in assets and gave \$189 million in 2017.** The top five MA-based community foundations alone accounted for 90% of 2017 grant dollars, led by the Boston Foundation that alone accounted for 74% of total giving in 2017. Over 90% of the community foundations funded arts and culture, and education; 80% funded environment-related activities; and more than 50% prioritized human services, health, and community and economic development.

## MA-Based Community Foundations by Total Giving, 2017

Foundation	Total Giving*
1. The Boston Foundation	\$137.2
2. Berkshire Taconic Community Foundation	\$13.3
3. Greater Worcester Community Foundation	\$8.4
4. Community Foundation of Western Massachusetts	\$7.7
5. Essex County Community Foundation	\$4.7
6. Cape Cod Foundation	\$4.1
7. North Central Massachusetts Community Foundation	\$3.6
8. Community Foundation for Nantucket	\$2.6
9. Community Foundation of Southeastern Massachusetts	\$2.3
10. Greater Lowell Community Foundation	\$1.4
11. Cambridge Community Foundation	\$1.3
12. Foundation for MetroWest	\$1.2
13. Permanent Endowment for Martha's Vineyard	\$0.6
14. Brookline Community Foundation	\$0.5
15. Watertown Community Foundation	\$0.1
16. Woods Hole Foundation	\$0.1

\* in millions

## TOP 20

### MA-Based Grantmaking Public Charities by Total Giving, 2017

Foundation	Total Giving*
1. Vanguard Charitable	\$758.2
2. President and Fellows of Harvard College	\$753.7
3. Sightsavers International	\$285.5
4. Partners Healthcare Systems	\$211.6
5. Combined Jewish Philanthropies of Boston	\$135.3
6. U.S. Charitable Gift Trust Fund	\$98.6
7. Pathfinder International	\$84.8
8. The Greater Boston Food Bank	\$75.8
9. Beth Israel Deaconess Medical Center	\$75.0
10. New England Farmworkers' Council	\$56.7
11. Pan-Massachusetts Challenge Trust	\$51.0
12. Way Finders	\$48.0
13. Central Boston Elder Services	\$42.4
14. United Way of Massachusetts Bay and Merrimack Valley	\$35.3
15. Springwell	\$29.9
16. Oxfam-America	\$29.2
17. Nellie Mae Education Foundation	\$28.2
18. The American Ireland Fund	\$27.2
19. Massachusetts Legal Assistance Corporation	\$25.6
20. Laspau	\$16.3

\* in millions

## Massachusetts operating foundations reported total giving of \$16 million in 2017

Operating foundations' 1% share of overall MA foundation giving was far less than the 14% share recorded nationally. However, the 14% seen nationally is largely due to foundations established by pharmaceuticals that provided close to \$10 billion in 2017, nearly all in the form of donated medicine.

## TOP 20

### MA-Based Operating Foundations by Total Giving, 2017

Foundation	Total Giving*
1. Gordon Foundation	\$8.1
2. Pinnacle Leadership Foundation	\$4.7
3. China Medical Board	\$4.3
4. Bert L. & N. Kuggie Vallee Foundation	\$1.3
5. Edu21C Foundation	\$0.9
6. BCLF Managed Assets Corporation	\$0.8
7. Association for the Relief of Aged Women of New Bedford	\$0.7
8. A Child Waits Foundation	\$0.5
9. Lincoln Institute of Land Policy	\$0.3
10. Neighborhood Partners Fund	\$0.3
11. Leo Murray & Irene D. Murray Scholarship Fund	\$0.3
12. Ossorio Foundation	\$0.3
13. John and Carol Barry Foundation	\$0.2
14. Swan Society in Boston	\$0.2
15. Sullivan Family Foundation	\$0.2
16. Griffin White Foundation	\$0.2
17. Lucretia Prentiss Bailey Trust of Massachusetts	\$0.2
18. Cummings Foundation	\$0.2
19. The Fragment Society	\$0.1
20. Lend A Hand Society	\$0.1

\* in millions

## Grantmaking Public Charities

Grantmaking public charities or public foundations are similar to community foundations in that they both raise money from the public and serve as grantmakers. Unlike community foundations, however, grantmaking public charities are typically defined based on specific issue areas rather than geographic areas. Candid tracks about 420 Massachusetts-based grantmaking public charities.

\* Data on grantmaking public charities has not been included in previous analyses in this section



## GIVING TO MASSACHUSETTS-BASED RECIPIENTS

This section examines giving by private and public  
U.S. grantmaking foundations to recipients within Massachusetts.

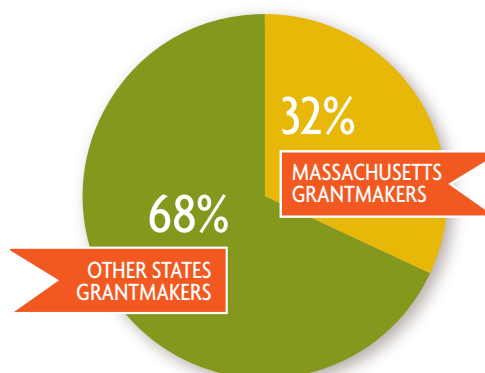
# GIVING TO MASSACHUSETTS-BASED RECIPIENTS



**Massachusetts received a total of \$4.5 billion in grant dollars in 2017, one-third of which was provided by MA-based grantmakers.** The Bill & Melinda Gates Foundation ranked first in grant dollars awarded, giving close to \$519 million to the state. Within MA, the Patrick J. McGovern Foundation provided the most grant dollars, followed by the Boston Foundation and Morningside Foundation.

## SOURCES OF SUPPORT FOR MA-BASED RECIPIENTS

Percent of Grant Dollars to Massachusetts



Total = \$4.5 Billion

## TOP 25

### Funders Awarding Grants to MA-Based Recipient Organizations, 2017\*

Name	State	Amount to MA*	Number of Grants
1. Bill & Melinda Gates Foundation	WA	\$518.9	121
2. Fidelity Charitable	OH	\$443.6	2,509
3. Patrick J. McGovern Foundation	MA	\$213.2	3
4. Dr. Miriam & Sheldon G. Adelson Charitable Trust	NV	\$119.2	2
5. Eli & Edythe Broad Foundation	CA	\$92.0	5
6. The Boston Foundation	MA	\$90.5	3,573
7. The Morningside Foundation	MA	\$82.1	3
8. Silicon Valley Community Foundation	CA	\$80.0	371
9. Combined Jewish Philanthropies of Boston	MA	\$65.9	350
10. President and Fellows of Harvard College	MA	\$65.8	91
11. Goldman Sachs Philanthropy Fund	NY	\$54.4	158
12. Schwab Charitable	CA	\$53.7	767
13. Stanley Family Foundation	CT	\$50.0	1
14. The Robert Wood Johnson Foundation	NJ	\$49.2	53
15. Barr Foundation	MA	\$43.6	165
16. National Philanthropic Trust	PA	\$40.8	41
17. The Kohlberg Foundation	NY	\$32.5	5
18. Klarman Family Foundation	MA	\$29.6	132
19. Beth Israel Deaconess Medical Center	MA	\$28.1	33
20. E. G. Watkins Family Foundation	FL	\$27.7	2
21. Atlantic Coast Conference	NC	\$26.5	1
22. Simons Foundation	NY	\$26.5	220
23. Bloomberg Family Foundation	NY	\$25.5	7
24. Massachusetts Legal Assistance Corporation	MA	\$25.3	15
25. Laura and John Arnold Foundation	TX	\$23.3	46

\* in millions



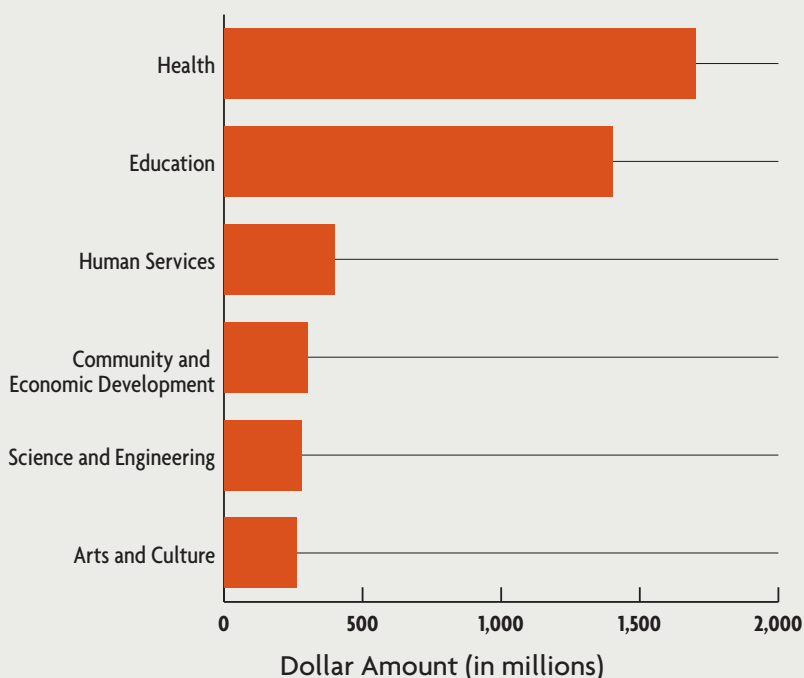
## Health, education, and human services were top funding priorities of grantmakers giving to Massachusetts in 2017.



Foundation Giving in Massachusetts by Major Subject, 2017<sup>6</sup>

The largest health award reported was a \$273 million grant from the Bill & Melinda Gates Foundation to the Cambridge-based Bill & Melinda Gates Medical Institute to develop transformative therapies, biologics, vaccines and biomarkers to improve the lives of the world's poorest populations. Within education, the Morningside Foundation granted an \$82 million general operating grant to the President and Fellows of Harvard College. Among the larger human services grants, was a \$3 million grant from W.K. Kellogg Foundation to Brandeis University to strengthen access to publicly available information on child wellbeing and racial and ethnic equity through support of an expanded state-of-the-art website; equity-focused research and outreach, user engagement and partnership activities.

DOLLAR AMOUNT BY SUBJECT



NUMBER OF GRANTS BY SUBJECT

Subject	Number of Grants
Health	8,674
Education	16,923
Human Services	10,812
Community and Economic Development	3,556
Science and Engineering	1,207
Arts and Culture	5,559

*Grants may benefit multiple subjects.*

## Foundation Giving to MA Recipients by Subject, 2017 <sup>6</sup>

Subject	Dollar Amount*	No. of Grants
<b>Agriculture, Fishing, and Forestry</b>	<b>\$40.9</b>	<b>611</b>
<b>Arts and Culture</b>	<b>\$259.6</b>	<b>5,559</b>
Arts (Multipurpose)	\$18.3	596
Historical Activities	\$22.7	733
Humanities	\$34.3	427
Museums	\$72.2	1,257
Performing Arts	\$87.2	1,849
Visual Arts	\$13.7	322
Other Arts	\$30.7	901
<b>Community and Economic Development</b>	<b>\$301.9</b>	<b>3,556</b>
Community Improvement	\$41.3	778
Economic Development and Employment	\$135.7	1,278
Housing Development	\$19.5	438
Other Community and Economic Development	\$130.5	1,382
<b>Education</b>	<b>\$1,454.4</b>	<b>16,923</b>
Adult Education	\$8.7	219
Early Childhood Education	\$9.1	183
Education Services	\$112.5	1,451
Elementary and Secondary Education	\$344.3	4,407
Graduate and Professional Education	\$97.7	1,173
Higher Education	\$757.7	5,949
Post-Secondary Student Services	\$10.0	206
Vocational Education	\$8.6	114
Other Education	\$271.3	5,242
<b>Environment and Animals</b>	<b>\$162.4</b>	<b>3,507</b>
Biodiversity	\$22.0	645
Domesticated Animals	\$6.8	458
Natural Resources	\$81.6	1,529
Other Environment and Animals	\$76.8	1,473
<b>Health</b>	<b>\$1,684.9</b>	<b>8,674</b>
In-Patient/Out-Patient Health Care	\$396.2	3,322
Medical Specialties	\$585.9	407
Mental Health	\$36.5	642
Public Health	\$528.7	788
Reproductive Health Care	\$63.6	249
Specified Diseases and Conditions	\$879.0	2,371
Other Health	\$264.6	2,313
<b>Human Rights</b>	<b>\$144.2</b>	<b>1,990</b>
<b>Human Services</b>	<b>\$414.2</b>	<b>10,812</b>
Emergency Assistance	\$30.9	1,363
Family Services	\$87.3	1,682
Housing Services and Residential Care	\$38.6	1,615
Youth Development	\$134.9	2,483
Other Human Services	\$159.3	4,871
<b>Information and Communications</b>	<b>\$102.0</b>	<b>1,234</b>
Communication Media	\$33.9	483
Journalism	\$15.2	131
Libraries	\$22.5	442
Media Access and Technology	\$36.4	220
<b>International Relations</b>	<b>\$78.3</b>	<b>1,055</b>
<b>Philanthropy and Nonprofit Management</b>	<b>\$162.5</b>	<b>1,334</b>
<b>Public Affairs</b>	<b>\$110.4</b>	<b>1,094</b>
<b>Public Safety</b>	<b>\$79.2</b>	<b>1,215</b>
Abuse Prevention	\$5.7	170
Courts and Legal Services	\$39.1	418
Crime Prevention	\$7.7	128
Disasters and Emergency Management	\$12.7	162
Other Public Safety	\$19.2	371
<b>Religion</b>	<b>\$89.1</b>	<b>2,206</b>
<b>Science and Engineering</b>	<b>\$288.2</b>	<b>1,207</b>
<b>Social Sciences</b>	<b>\$70.7</b>	<b>418</b>
<b>Sports and Recreation</b>	<b>\$40.6</b>	<b>1,605</b>
<b>Other/Unknown</b>	<b>\$44.9</b>	<b>1,566</b>

\* in millions Grants may benefit multiple subjects

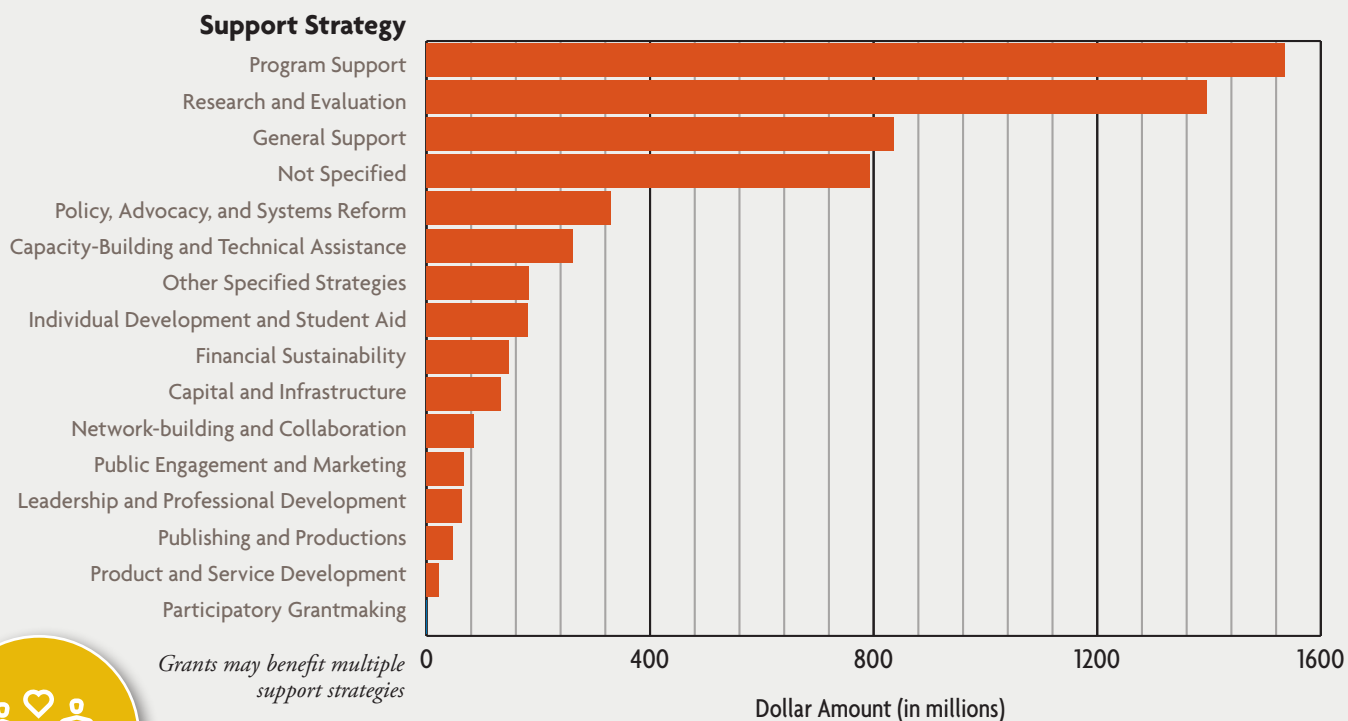




**Grantmakers provided 14,000 grants – a combined total of \$1.5 billion – to Massachusetts for program support, the largest share of funding received by any type of support strategy.**

While research and evaluation accounted for the second largest share at \$1.3 billion in giving, the category received less than 4,000 grants. General operating support was the third most common support strategy, the top recipients of which were Harvard College (\$61 million), Boston College (\$33 million), and the Children's Hospital Corporation (\$29 million). About 18% of grants did not specify support strategy, therefore figures may underestimate giving to each group.

Foundation Giving in Massachusetts by Type of Support, 2017<sup>7</sup>



## Foundation Giving in Massachusetts by Population Group, 2017<sup>7</sup>

Population Group	Amount*	No. of Grants
Aging/Seniors	\$46.0	887
Children and Youth	\$884.3	14,669
Economically Disadvantaged People	\$1,255.1	13,714
Ethnic/Racial Identity	\$173.7	2,674
Immigrants, Migrants, and Refugees	\$24.1	682
Incarcerated People and Ex-Offenders	\$7.8	260
Indigenous Peoples Outside U.S.	\$3.3	91
LGBTQ People	\$7.5	224
Men and Boys	\$51.4	1,195
Military Personnel and Veterans	\$11.5	414
People with HIV/AIDS	\$52.2	337
People with Disabilities	\$126.0	2,903
Religious Affiliation [Religious group]	\$107.4	2,400
Substance Abusers	\$23.3	339
Women and Girls	\$228.1	3,579
Other Specified Populations	\$1,416.9	10,121
Not Specified/General Public	\$937.9	13,002

\*in millions

**Across identified population groups in Massachusetts, 'economically disadvantaged people' and 'children and youth' received the most funding.** While 'economically disadvantaged people' received over \$1 billion, 'children and youth' obtained the greatest number of grants across population types. The largest grant towards 'economically disadvantaged people' was a \$273 million dollar grant to the Bill & Melinda to the Cambridge-based Bill & Melinda Gates Medical Research Institute. Among the larger grants awarded for 'children and youth' was a \$2.2 million grant from the Robert Wood Johnson Foundation to Boston Medical Center to build early childhood systems across states and communities that promote health equity. 21% of grants did not specify population group, therefore figures may underestimate giving to each of these groups.



## STATE AND COUNTY-LEVEL TRENDS

This section focuses on trends across Massachusetts, providing insight into each of the state's fourteen counties. Since MA is home to over 100 higher education institutions that receive large proportions of funding, the grants analysis looks at both total funding to MA and total funding to MA excluding giving to higher education institutions and private and community foundations (See Methodology).



# STATE AND COUNTY-LEVEL TRENDS



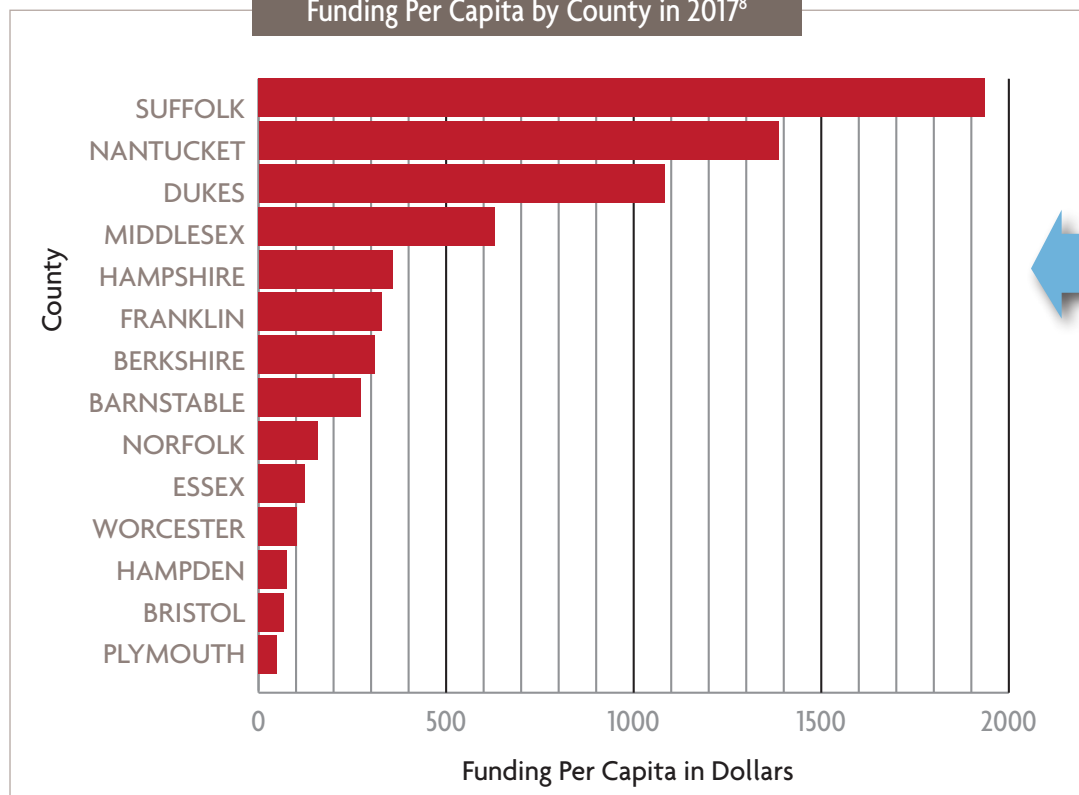
**According to Candid's Foundation Maps, cumulative grantmaking to Massachusetts in 2017 amounted to \$4.7 billion. Excluding grants to private and community foundations and higher education institutions reduced this amount by over \$1.5 billion dollars.**

## Total Grantmaking Funding to MA by County in 2017

County	Total Dollar Value of Grants	Dollar Value excluding grants to foundations and higher education
Barnstable	\$61	\$59
Berkshire	\$79	\$40
Bristol	\$48	\$38
Dukes	\$19	\$19
Essex	\$110	\$96
Franklin	\$24	\$23
Hampden	\$60	\$35
Hampshire	\$111	\$58
Middlesex	\$2000	\$999
Nantucket	\$17	\$15
Norfolk	\$265	\$110
Plymouth	\$26	\$24
Suffolk	\$1800	\$1500
Worcester	\$143	\$84
Total	\$4700	\$3100

*\*in millions*

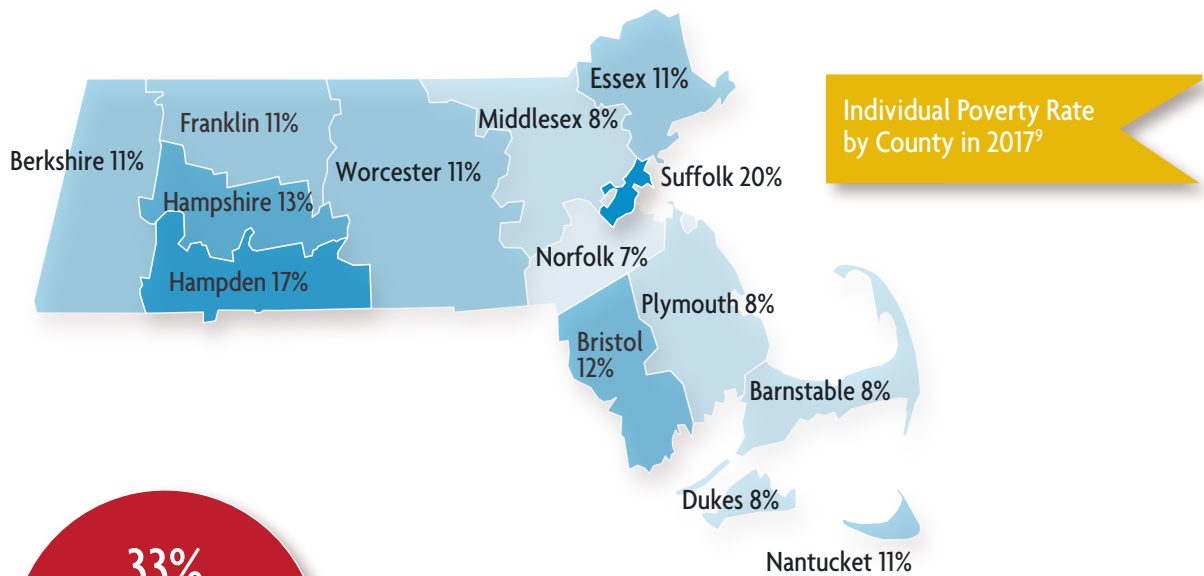
## Funding Per Capita by County in 2017<sup>8</sup>



Since MA counties range in population from 10,000 to over a million people, funding per capita allows comparison between regions of different size. **When accounting for the number of residents within each county and excluding grants to private and community foundations and higher education institutions, Suffolk received the most funding per capita and Plymouth received the least.**

## POVERTY

According to the 2017 American Community Survey's 5-year estimates, 11% of individuals across Massachusetts live below the poverty threshold. Suffolk experiences the highest rates of poverty at 20%, followed by Hampden where the individual poverty rate is 17%.



**33%**  
of residents in  
Amherst, Hampden  
County live in  
poverty.

### Across the state, the following cities and towns experience poverty levels exceeding 20%

1. Amherst, Hampden County 33%
2. Springfield, Hampden County 29%
3. Holyoke, Hampden County 29%
4. Lawrence, Essex County 24%
5. New Bedford, Bristol County 23%
6. Lowell, Middlesex County 22%
7. Worcester, Worcester County 22%
8. Aquinnah, Dukes County 22%
9. Boston, Suffolk County 21%
10. Fall River, Bristol County 20%





## EDUCATIONAL ATTAINMENT

Educational attainment refers to the percent of the county's population over 25 that have obtained either a High School or bachelor's degree.<sup>10</sup>

Across Massachusetts, 90% of residents graduated from high school, and 42% held a bachelor's degree in 2017. Within the state, **Bristol County experienced the lowest rates of high school graduation at 84%.** In Hampden County, only slightly more than a quarter of residents attained a bachelor's degree.



## FOOD INSECURITY

The United States Department of Agriculture describes food insecurity as "a household-level economic and social condition of limited or uncertain access to adequate food," hindering individuals from living active, healthy lives.<sup>11</sup>

Across Massachusetts, 9% of the population faced food insecurity. **Suffolk County experienced the highest rates** with 14% of residents having limited and/or uncertain access to food.



## HOUSING

Residents across the state struggle to access safe housing due to a shortage of affordable units. Housing cost burden refers to households that spend more than 30% of their income on housing; those spending more than 50% on housing are considered severely cost burdened.<sup>12</sup>

Across Massachusetts, 35% of households are cost burdened and 16% are severely cost burdened. **Residents in Suffolk and Dukes County are most drastically affected,** with 43% of the population experience housing cost burden.



## POVERTY

There are various statistics to demonstrate the poverty status of a community. As child poverty rates tend to be higher than adult poverty rates across MA, we provide poverty status for adults, 18 and over, and children, under 18, across counties.<sup>9</sup>

10% of adults and 15% of children across Massachusetts live below the federal poverty level. **Suffolk County experiences the highest rates of adult and child poverty** at 18% and 28%, respectively.

*Please refer to endnotes on this page for this section's data sources.*





## Barnstable

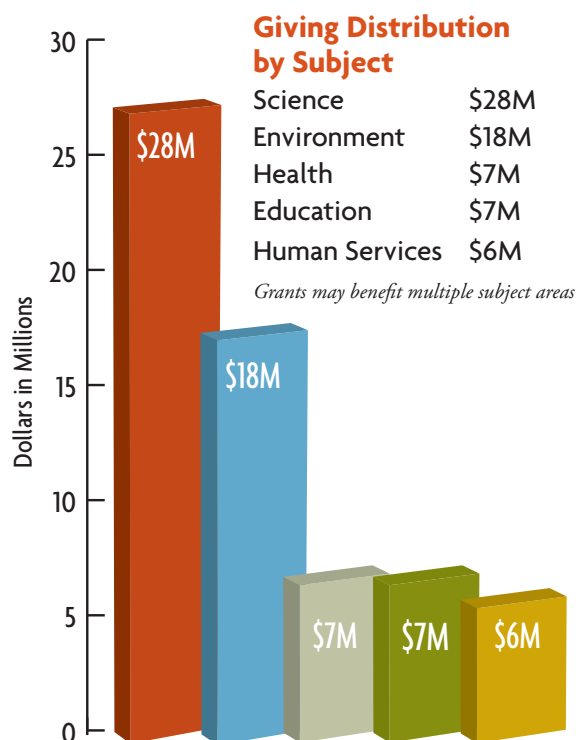
Barnstable County is home to **213,900** residents. The population has a median age of **52** – the highest of any MA county – and over **10%** of Barnstable residents are veterans.<sup>14</sup> For the year-round population, **a shortage of affordable housing** significantly affects low to middle-income families. To learn more, please access Housing Assistant Corporation's 2018 report Housing on Cape Cod.

In 2017, Barnstable received **2,307** grants from **791** funders. Funders prioritized giving to environment and/or science-related topic areas, with a total of \$25 million directed to Woods Hole Oceanographic Institute.



**\$61 Million**  
total dollar value of grants

**\$59 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Stanley W. Watson Foundation
2. Cape Cod Foundation
3. Josephine and Louise Crane Foundation
4. Yawkey Foundation II
5. The Boston Foundation

## COUNTY FACTS

### POVERTY



**7%** of Adults  
**12%** of Children  
in Barnstable Live in Poverty

### EDUCATIONAL ATTAINMENT

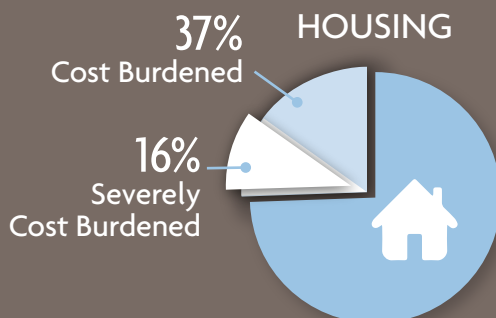


High School Graduate or Higher

**96%**

Bachelor's Degree or Higher

**42%**



**FOOD INSECURITY**  
**16,910** Individuals





## Berkshire

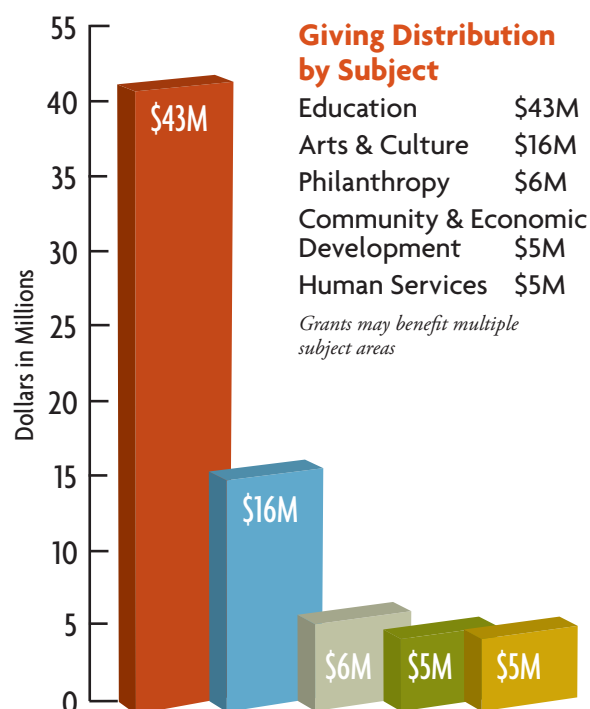
Berkshire County consists of 32 cities and towns with **127,751** individuals. Among Berkshire subdivisions, the cities of **North Adams** and **Pittsfield**, and town of **Mount Washington** experience poverty rates exceeding 15%. In 2017, Berkshire Taconic Community Foundation (BTCF) identified challenges faced by county residents related to **jobs and the economy, demographic transitions, youth and the future workforce, deepening inequality, and assets and infrastructure**. Please access [BTCF's A Closer Look: The Berkshire Taconic Region](#) Today learn more about the region.

In 2017, Berkshire County received **3,425** grants from **853** funders. Nearly 50% of all funding supported education, namely higher education. Further, funders prioritized arts and culture giving to museums and performing arts.



**\$79 Million**  
total dollar value of grants

**\$40 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Berkshire Taconic Community Foundation
2. Barr Foundation
3. The Feigenbaum Foundation
4. Josephine & Louise Crane Foundation
5. Berkshire United Way

## COUNTY FACTS

### POVERTY



11% of Adults  
15% of Children  
in Berkshire Live in Poverty

### EDUCATIONAL ATTAINMENT

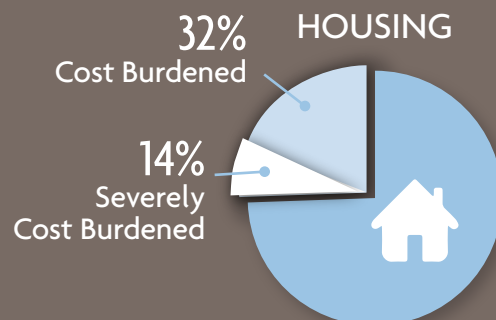


High School Graduate or Higher

91%

Bachelor's Degree or Higher

33%



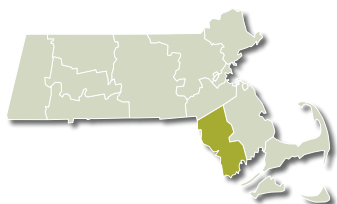
FOOD INSECURITY  
12,350 Individuals



## Bristol

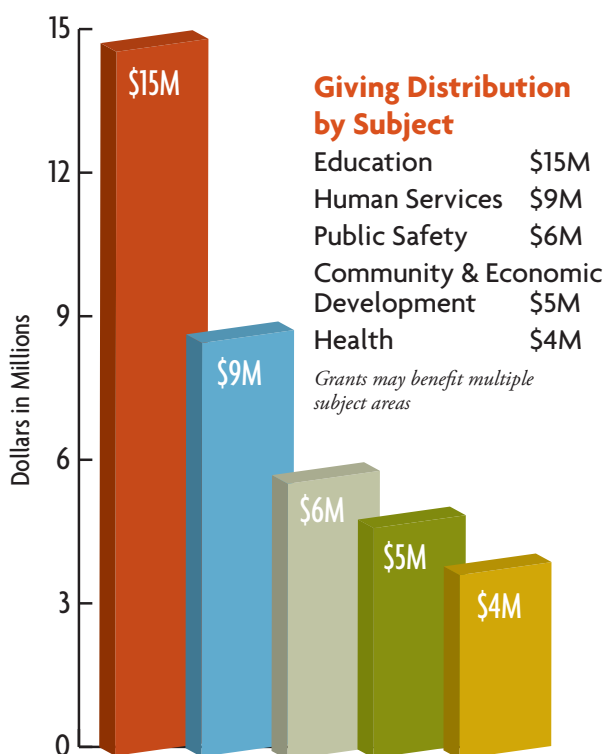
Bristol County consists of 20 cities and towns with a total population of **557,016**. Within the county, **New Bedford** and **Fall River** experience poverty rates of over 20%. In 2017, People Acting in Community Endeavors' (PACE) study of Greater New Bedford identified goals around **homelessness prevention, affordable housing advocacy, a strengthened response to the opioid epidemic** and **food bank expansion** for community improvement. Please visit [PACE's Community Assessment Report & Strategic Plan](#) for more information on the region.

In 2017, Bristol County received **1,978** grants from **719** funders. Of the \$15 million supporting education, nearly half went towards higher education. Funders additionally prioritized human services including shelter and residential care and youth development.



**\$48 Million**  
total dollar value of grants

**\$38 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Harold Whitworth Pierce Charitable Trust
2. Lloyd G. Balfour Foundation
3. Bristol County Savings Charitable Foundation
4. Island Foundation
5. The Carney Family Charitable Foundation

## COUNTY FACTS

### POVERTY



**11%** of Adults  
**17%** of Children  
in Bristol Live in Poverty

### EDUCATIONAL ATTAINMENT

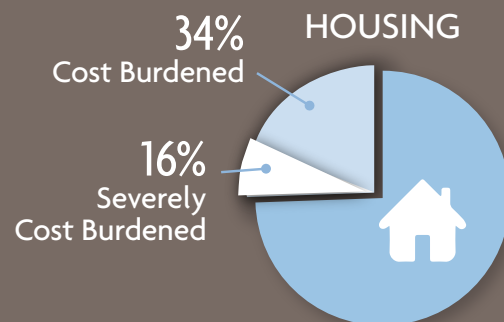


High School Graduate or Higher

**84%**

Bachelor's Degree or Higher

**27%**



**FOOD INSECURITY**  
**56,280** Individuals

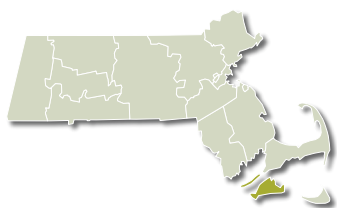




## Dukes

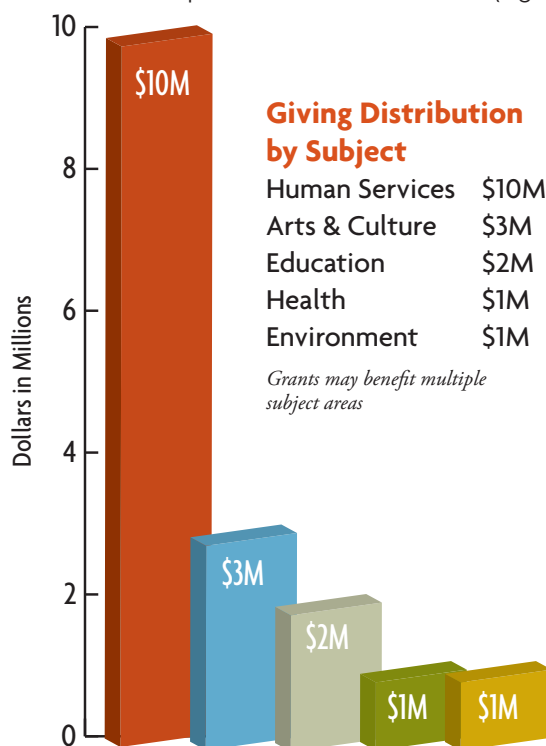
Comprised of various islands including Martha's Vineyard, Dukes County contains 7 towns with **17,275** residents. While the county experiences the lowest levels of unemployment (3%), seen in any MA county, the town of **Aquinnah** experiences disproportionately high rates of poverty at **22%**. In 2017, the Community Action Committee of Cape Cod & Islands (CACCI) identified **access to childcare, health care, immigration services, housing** and **employment** as challenges faced by Dukes residents. To learn more, please visit [CACCI's Community Assessment & Strategic Plan](#).

In 2017, Dukes County received a total of **735** grants from **221** funders. More than half of all giving supported human services including youth development and basic and emergency aid. Funders further prioritized arts and culture (e.g. historical activities, performing arts).



**\$19 Million**  
total dollar value of grants

**\$19 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Barr Foundation
2. Cedar Tree Foundation
3. The Louise, Sven and Anna Betty Carlson Foundation
4. The Boston Foundation, Inc
5. Permanent Endowment for Martha's Vineyard

## COUNTY FACTS

### POVERTY



**7%** of Adults  
**13%** of Children  
in Dukes Live in Poverty

### EDUCATIONAL ATTAINMENT



High School Graduate or Higher

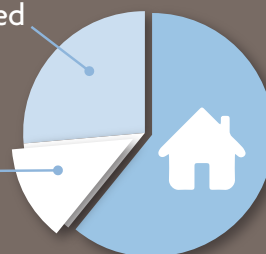
**97%**

Bachelor's Degree or Higher

**46%**

**43%** HOUSING  
Cost Burdened

**21%**  
Severely  
Cost Burdened



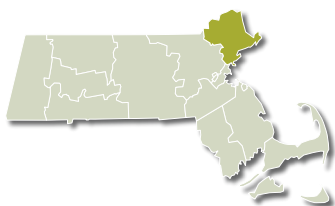
**FOOD INSECURITY**  
**1,550** Individuals



## Essex

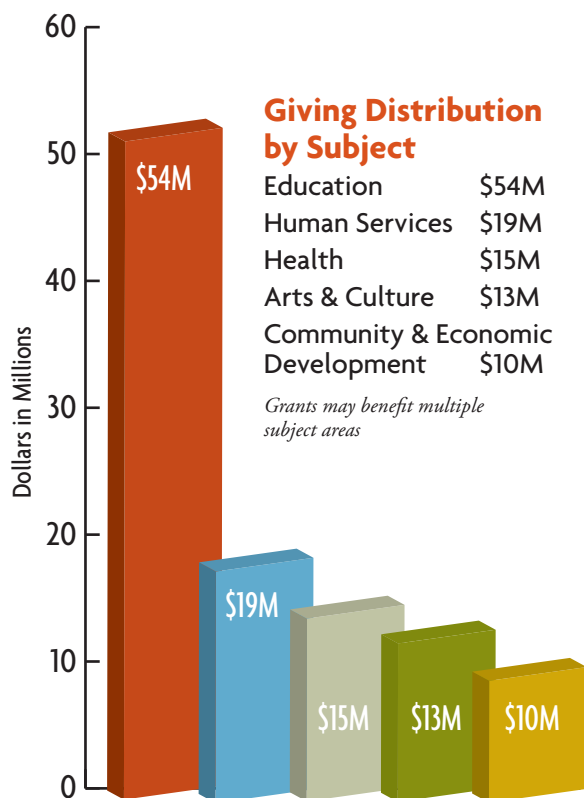
Essex County has a population of **775,860** living across 34 cities and towns. In the city of **Lawrence**, nearly a quarter of residents live in poverty; **Lynn** and **Salem** additionally experience poverty rates exceeding 15%. To learn more about Essex, please visit Essex County Community Foundation's [community indicator project](#) for regional action.

In 2017, Essex received a total of **4,539** grants from **1,361** funders. Over half of all giving supported education, with a focus on elementary and secondary education. Further, giving was directed to human services. (e.g. youth development, shelter and residential care).



**\$110 Million**  
total dollar value of grants

**\$96 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Boston Foundation
2. Barr Foundation
3. Essex County Community Foundation
4. United Way of Massachusetts Bay
5. Yawkey Foundation II

## COUNTY FACTS

### POVERTY



10% of Adults  
15% of Children  
in Essex Live in Poverty

### EDUCATIONAL ATTAINMENT



High School Graduate or Higher

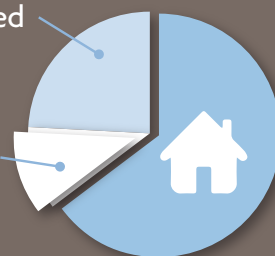
89%

Bachelor's Degree or Higher

39%

37% HOUSING  
Cost Burdened

17%  
Severely  
Cost Burdened



FOOD INSECURITY  
55,620 Individuals

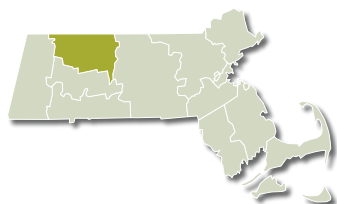




## Franklin

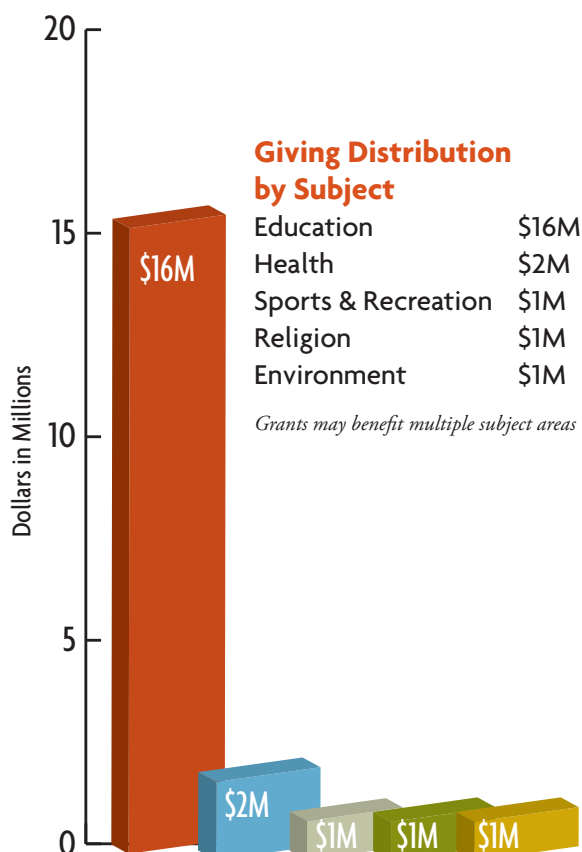
Franklin County consists of **70,926** individuals in 26 subdivisions. The towns of **Wendell**, **Sutherland** and **Charlemont** experience poverty rates over 15%, the highest within the county. For more information on the region, please visit Community Action of the Franklin, Hampshire, and North Quabbin Regions' [Community Needs Assessment](#).

In 2017, Franklin County received **794** grants from **400** funders. More than two thirds of all giving supported education (e.g. elementary and secondary education). Further, funders prioritized health-related work with a focus on out-patient medical care.



**\$24 Million**  
total dollar value of grants

**\$23 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Edward P. Evans Foundation
2. J. M. R. Barker Foundation
3. Community Foundation of Western Massachusetts
4. The Beveridge Family Foundation
5. The Henry P. Kendall Foundation

## COUNTY FACTS

### POVERTY



**10%** of Adults  
**15%** of Children  
in Franklin Live in Poverty

### EDUCATIONAL ATTAINMENT

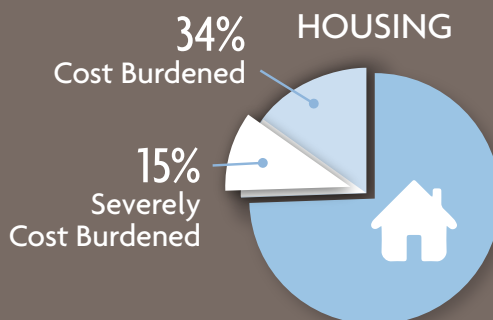


High School Graduate or Higher

**93%**

Bachelor's Degree or Higher

**37%**



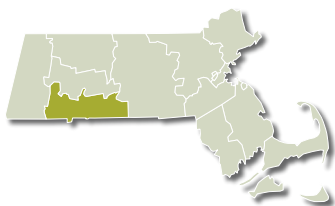
**FOOD INSECURITY**  
**6,280** Individuals



## Hampden

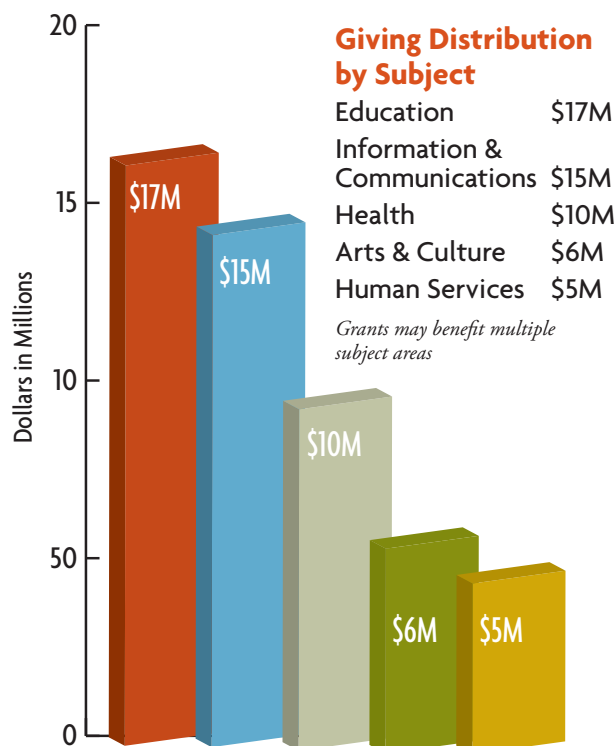
Hampden county is home to **469,188** residents across 32 cities and towns. Demographically, nearly **a quarter** of residents identify as Hispanic or Latino; **16%** of the population reports living with a disability. Within Hampden, **Springfield** and **Holyoke** experience disproportionately high poverty rates of **28%**. For more information on Hampden, please visit Community Action of the Franklin, Hampshire, and North Quabbin Regions' [Community Needs Assessment](#).

In 2017, Hampden County received **3,241** grants from **705** funders. About a quarter of all giving supported a variety of education-related services. Further, funders prioritized information and communication media (e.g. WGBH).



**\$60 Million**  
total dollar value of grants

**\$35 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Community Foundation of Western Massachusetts
2. MassMutual Foundation
3. Irene E. & George A. Davis Foundation
4. The Beveridge Family Foundation
5. Barr Foundation

## COUNTY FACTS

### POVERTY



**15%** of Adults  
**27%** of Children  
in Hampden Live in Poverty

### EDUCATIONAL ATTAINMENT

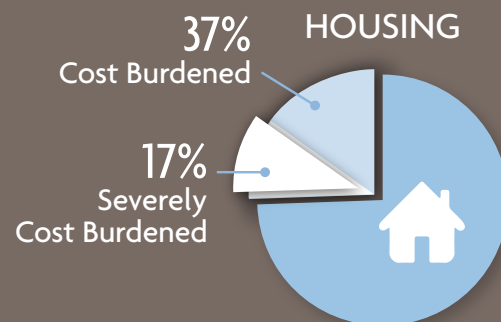


High School Graduate or Higher

**85%**

Bachelor's Degree or Higher

**27%**



**FOOD INSECURITY**  
**46,890** Individuals

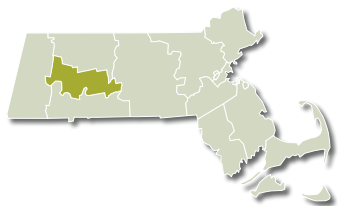




## Hampshire

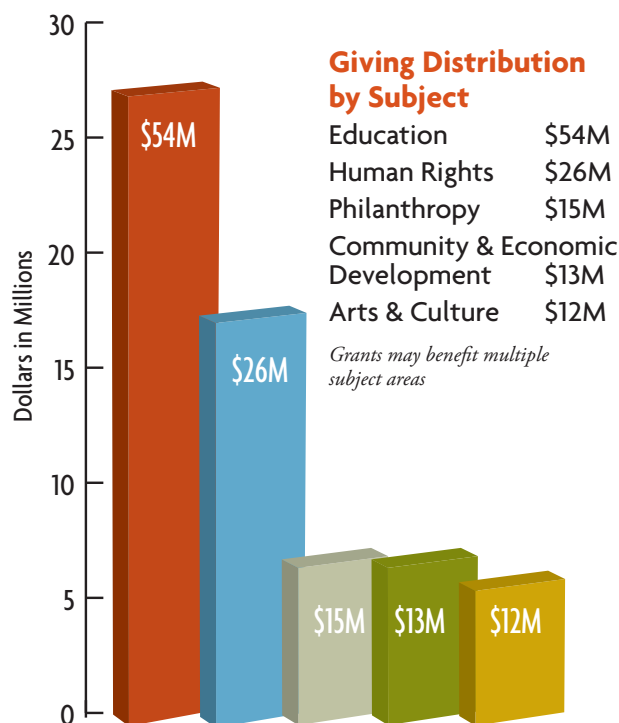
Hampshire County consists of **161,197** residents across 20 cities and towns. Demographically, nearly **a quarter** of residents identify as Hispanic or Latino; **16%** of the population reports living with a disability. For more information on Hampshire, please visit Community Action of the Franklin, Hampshire, and North Quabbin Regions [Community Needs Assessment](#).

In 2017, Hampshire County received **2,644** grants from **1,065** funders. Nearly half of all giving supported education, most of which was spent on higher education. Funders further prioritized human rights giving towards topics including antidiscrimination and social rights.



**\$111 Million**  
total dollar value of grants

**\$58 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Boston Foundation
2. Community Foundation of Western Massachusetts
3. The Frances Fund
4. MassMutual Foundation
5. Barr Foundation

## COUNTY FACTS

### POVERTY



**14% of Adults**  
**12% of Children**  
in Hampshire Live in Poverty

### EDUCATIONAL ATTAINMENT

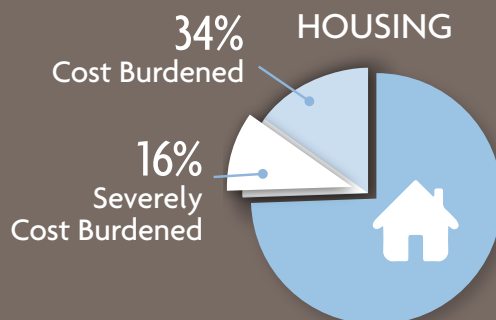


High School Graduate or Higher

**95%**

Bachelor's Degree or Higher

**46%**



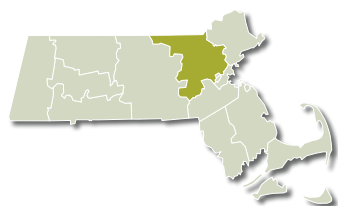
**FOOD INSECURITY**  
**15,430** Individuals



## Middlesex

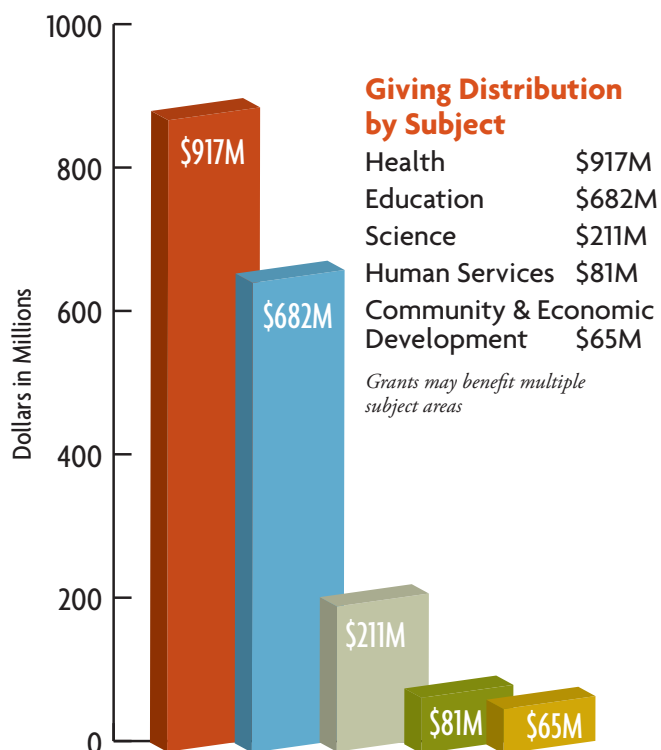
Middlesex County consists of **1,582,857** residents across 54 cities and towns. **Lowell** residents experience disproportionately high rates of poverty at 22%, followed by the city of **Malden**. In 2017, Community Teamwork, Inc conducted a needs assessment pinpointing housing and **homelessness, substance abuse, lack of jobs, mental health, transportation, and food and nutrition** as top unmet needs in greater Lowell. To learn more about other communities in this region, please visit Foundation for Metrowest's [community indicator project](#) for regional action.

In 2017, Middlesex County received **15,860** grants from **4,679** funders. Half of all grants supported health-related subjects such as diseases and conditions. Funders further prioritized higher education, giving large proportions of funding to Harvard University and Massachusetts Institute of Technology.



**\$2000 Million**  
total dollar value of grants

**\$999 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Patrick J. McGovern Foundation
2. The Morningside Foundation
3. Combined Jewish Philanthropies of Boston
4. The Boston Foundation
5. Klarman Family Foundation

## COUNTY FACTS

### POVERTY



### EDUCATIONAL ATTAINMENT

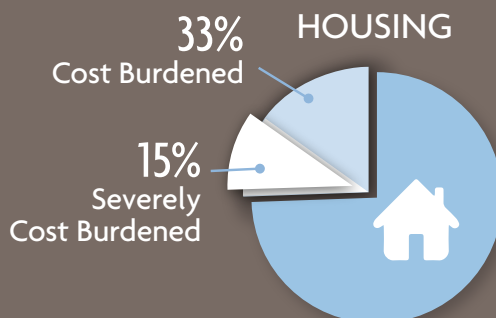


High School Graduate or Higher

**93%**

Bachelor's Degree or Higher

**54%**



**FOOD INSECURITY**  
**118,770** Individuals

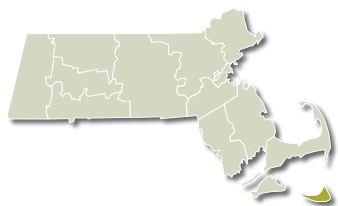




## Nantucket

The smallest county in Massachusetts, Nantucket has **10,912** residents. In 2017, the Community Action Committee of Cape Cod & Islands (CACCI) identified **access to childcare, health care, immigration services, and housing** as challenges faced by Nantucket residents. To learn more, please visit CACCI's [Community Assessment & Strategic Plan](#).

In 2017, Nantucket County received **862** grants from **255** funders. More than a third of all grants were directed to health and predominantly spent on in-patient medical care. Further, funders prioritized arts and culture distributing grants towards performing arts and historical activities.

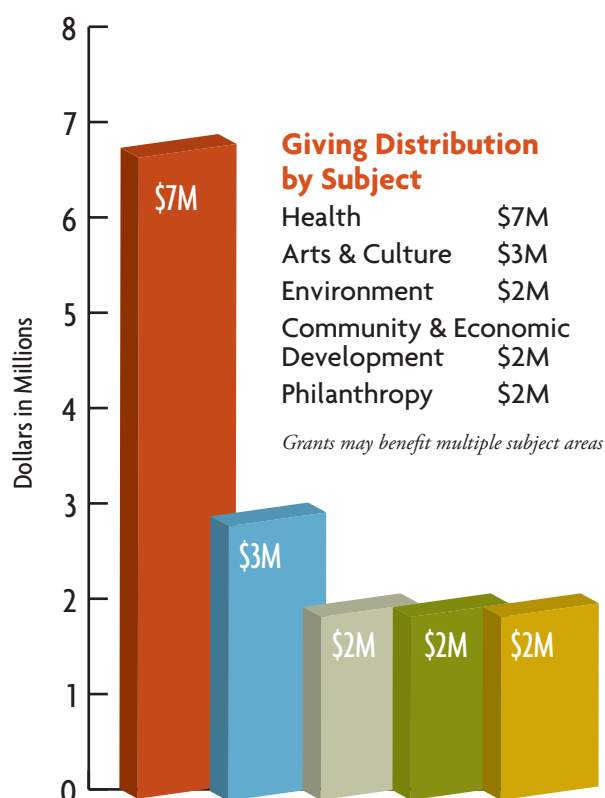


**\$17 Million**

total dollar value of grants

**\$15 Million**

excluding grants to private & community foundations and higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Tupancy-Harris Foundation of 1986
2. Community Foundation for Nantucket
3. Aloha Foundation
4. Combined Jewish Philanthropies of Boston
5. The Richard K. Lubin Family Foundation

## COUNTY FACTS

### POVERTY



8% of Adults  
22% of Children  
in Nantucket Live in Poverty

### EDUCATIONAL ATTAINMENT

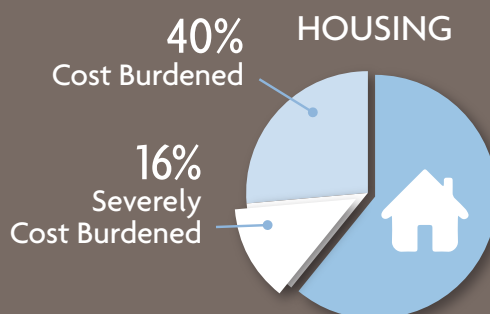


High School Graduate or Higher

94%

Bachelor's Degree or Higher

45%

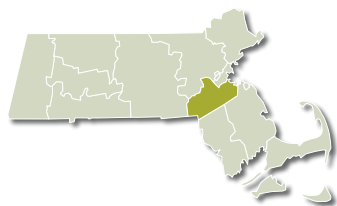


**FOOD INSECURITY**  
970 Individuals



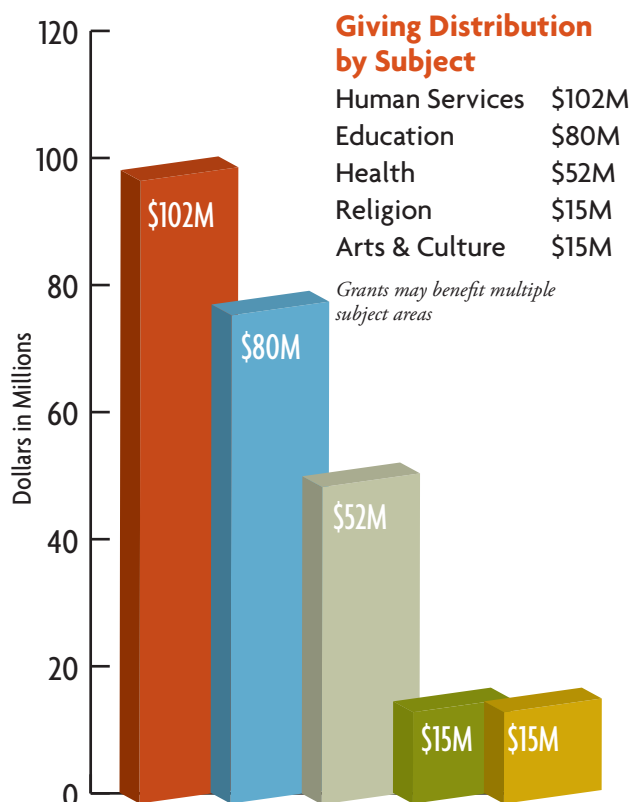
## Norfolk

Norfolk has a population of **694,389** across 28 cities and towns. With a median household income of \$95,668, Norfolk is the wealthiest county in Massachusetts, experiencing the lowest poverty and food insecurity rates across the state. To learn more about Norfolk and nearby regions, please visit Self Help, Inc's [Community Assessment & Strategic Plan](#). In 2017, Norfolk County received a total of **4,587** grants from **1,949** funders. Close to 40% of all giving went towards human services. Funders additionally prioritized elementary, secondary and higher education.



**\$265 Million**  
total dollar value of grants

**\$110 Million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Combined Jewish Philanthropies of Boston
2. Klarman Family Foundation
3. The Boston Foundation, Inc
4. Yawkey Foundation II
5. The Mooney-Reed Charitable Foundation

## COUNTY FACTS

### POVERTY



**7%** of Adults  
**7%** of Children  
in Norfolk Live in Poverty

### EDUCATIONAL ATTAINMENT

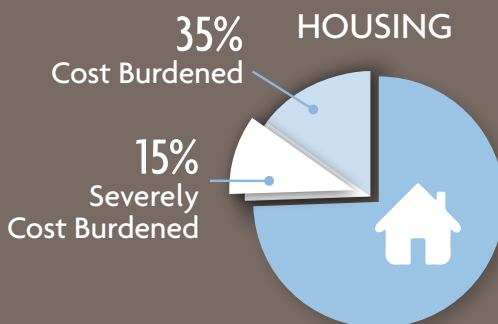


High School Graduate or Higher

**94%**

Bachelor's Degree or Higher

**53%**



**FOOD INSECURITY**  
**50,190** Individuals

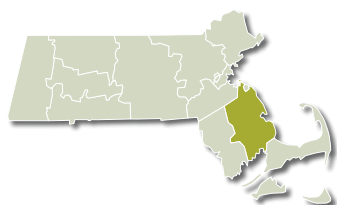




## Plymouth

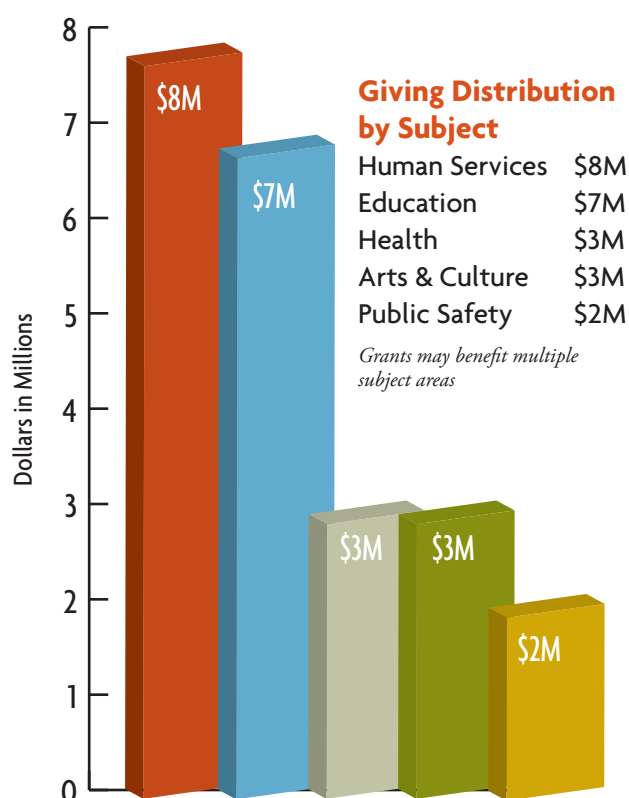
Plymouth County is home to **509,114** residents across 27 cities and towns. Within the county, the city of **Brockton** experiences the highest poverty rates at 17%. In 2020, United Way of Greater Plymouth County highlighted health, education and financial stability as prevalent needs in the region. For more information, please visit [United Way's Summary of Regional Community Needs Assessment](#).

In 2017, Plymouth County received a total of **1,604** grants from **671** funders. Close to 1/3 of all giving went towards human services such as youth development. Additionally, funders prioritized education with a focus on elementary and secondary education.



**\$26 million**  
total dollar value of grants

**\$24 million**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. Barr Foundation
2. Yawkey Foundation II
3. The Boston Foundation
4. Devonshire Foundation
5. Ruby W. and Lavon Parker Linn Foundation

## COUNTY FACTS

### POVERTY



**7%** of Adults  
**11%** of Children  
in Plymouth Live in Poverty

### EDUCATIONAL ATTAINMENT

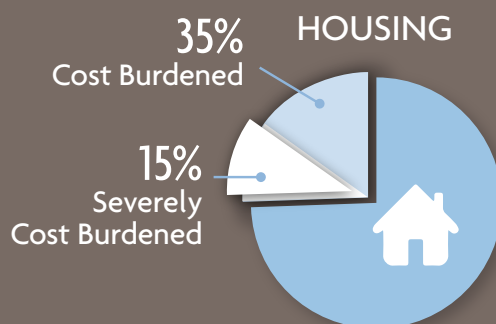


High School Graduate or Higher

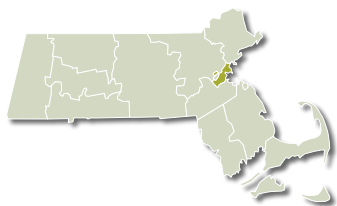
**93%**

Bachelor's Degree or Higher

**36%**



**FOOD INSECURITY**  
**41,170** Individuals



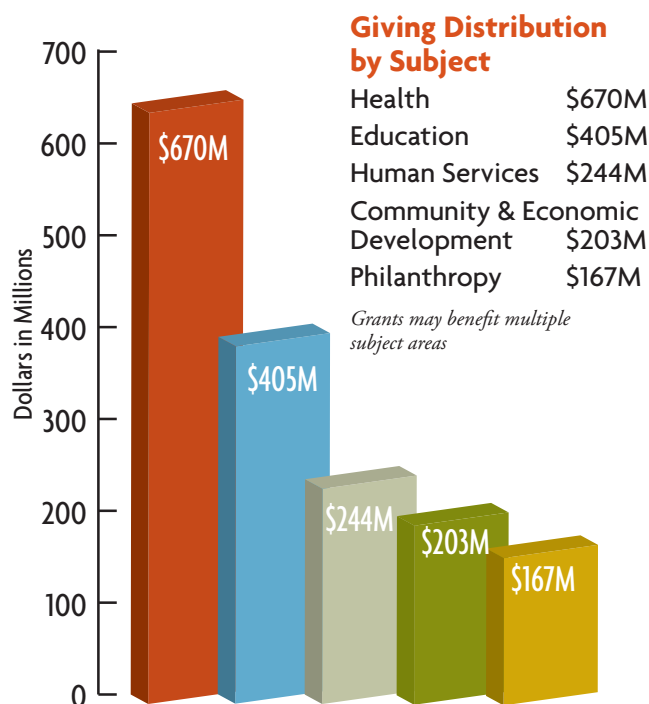
## Suffolk

Suffolk County has a population of **780,685** with the lowest median age of **33** across its four subdivisions.<sup>iv</sup> Within the county, **Boston** and **Chelsea** experience poverty rates of **20%**, followed by **Revere**. Suffolk experiences the highest rates of **poverty, food insecurity, housing cost burden** and **unemployment** in comparison to any other county within the state. For a deep dive into Greater Boston's community needs, please explore the research of [Boston Indicators](#) and [Boston Planning and Development Agency](#).

In 2017, Suffolk County received **24,220** grants from **5,591** funders. More than a third of funding went towards health, supporting work including in-patient medical care. Funders additionally prioritized education, providing grants to elementary, secondary and higher education institutions.

**\$1.8 Billion**  
total dollar value of grants

**\$1.5 Billion**  
excluding grants to private  
& community foundations and  
higher education institutions.



### TOP 5 MA-Based Funders by Total Giving

1. The Boston Foundation
2. Combined Jewish Philanthropies of Boston
3. Barr Foundation
4. Klarman Family Foundation
5. One8 Foundation

## COUNTY FACTS

### POVERTY



**18%** of Adults  
**28%** of Children  
in Suffolk Live in Poverty

### EDUCATIONAL ATTAINMENT

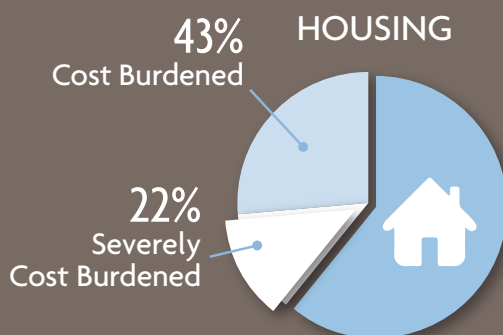


High School Graduate or Higher

**85%**

Bachelor's Degree or Higher

**44%**



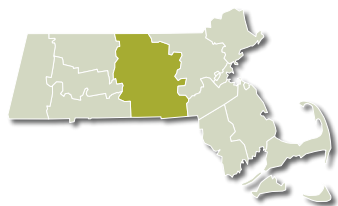
**FOOD INSECURITY**  
**107,030** Individuals





## Worcester

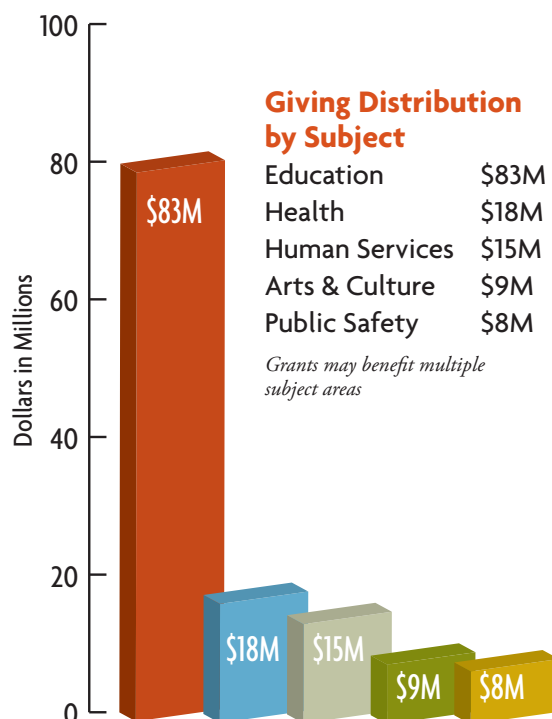
Worcester County is home to **818,249** individuals over 60 cities and towns. Within the county, the city of **Worcester** and towns of **Southbridge** and **Fitchburg** experience poverty rates exceeding 17%. Montachusett Opportunity Council's community assessment of North Worcester County identified **workforce development, financial education, access to basic supports, and behavioral health** as community priorities. Additionally, Worcester Community Action Council's assessment of the city of Worcester and neighboring areas revealed that **youth employment, child care, financial literacy, and access to bilingual services** are top community needs.



**\$143 Million**  
total dollar value of grants

**\$84 Million**  
excluding grants to private & community foundations and higher education institutions.

In 2017, Worcester County received a total of **5,720** grants from **1,089** funders. Over half of all giving supported elementary, secondary or higher education. Further, funders prioritized health giving to diseases and conditions, medical specialties and public health.



### TOP 5 MA-Based Funders by Total Giving

1. Greater Worcester Community Foundation
2. The C. Jean & Myles McDonough Charitable Foundation
3. Shaich Family Foundation
4. The Robert & Michelle Cooke Atchinson Foundation
5. Barr Foundation

## COUNTY FACTS

### POVERTY



**10% of Adults**  
**14% of Children**  
in Worcester Live in Poverty

### EDUCATIONAL ATTAINMENT

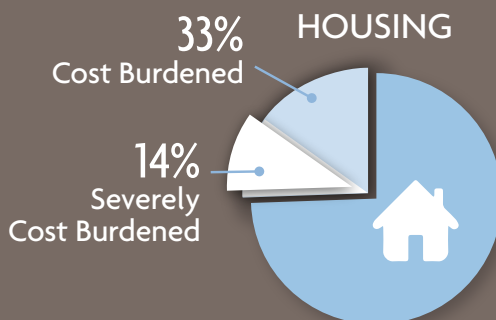


High School Graduate or Higher

**90%**

Bachelor's Degree or Higher

**35%**



**FOOD INSECURITY**  
**70,760** Individuals

# RESOURCE CENTER AND ENDNOTES



## RESOURCE CENTER

The following list is a compilation of publications conducted of Massachusetts regions after 2016. In addition to these, there are a wide array of community health assessments and reports available to the public that provide insight into Massachusetts communities.

- A Closer Look: The Berkshire Taconic Region Today. Berkshire Taconic Community Foundation, 2017.
- Aging on Nantucket: a community needs assessment. The Nantucket Center for Elder Affairs, Inc., 2017.
- Community Assessment Report & Strategic Plan. Community Action Committee of Cape Cod & Islands, Inc., 2017.
- Community Assessment Report & Strategic Plan. People Acting in Community Endeavors, 2017.
- Community Assessment Report & Strategic Plan. Self Help, Inc., 2017.
- Community Assessment Report & Strategic Plan. South Shore Community Action Council, 2017.
- Community Needs Assessment. Community Action of the Franklin, Hampshire and North Quabbin Regions, 2017.
- Community Needs Assessment. Community Teamwork, 2017.
- Coxe, S. & Quinn, D. Housing on Cape Cod: The High Cost of Doing Nothing. Housing Assistance Corporation, 2018.
- Creating Solutions. Strengthening Community. Community Assessment Report & Strategic Plan. Montachusett Opportunity Council, Inc., 2017.
- Gleckel, J. Status of Women and Girls in Western Massachusetts. The Women's Fund of Western Massachusetts, 2019.
- Rosenberg, E. Impact Essex County: An Overview of Key Trends. Essex County Community Foundation, 2019.
- Rosenberg, E. Impact MetroWest Regional Overview: Summary of Key Trends. The Foundation for MetroWest, 2020.
- Students Voices: Perspectives on How Schools Are and Should Be. Education Law Clinic of Harvard Law School and Trauma and Learning Policy Initiative of Massachusetts Advocates for Children and Harvard Law School, 2019.
- Summary of Regional Community Needs Assessments. United Way of Greater Plymouth County, 2020.

## ENDNOTES

- 1 Candid, 2020. Figures based on unadjusted dollars. Includes all non-terminated independent, corporate, community, and operating foundations. Sources of data for these foundations include IRS information returns (Form 990-PF for private organizations, Form-990 for community foundations), and foundation reports. Assets are stated at market value. Total giving amount includes grants, scholarships, and employee matching gifts; it does not include all qualifying distributions, e.g., loans, PRIs, set-asides, and program or other administrative expenses.
- 2 2017 SOI Tax Stats Historic Table (Massachusetts). Internal Revenue Department, 2020.
- 3 Indiana University Lilly Family School of Philanthropy. Giving USA: The Annual Report on Philanthropy for the Year 2017. Giving USA, 2018.
- 4 Donor Advised Funds. The Boston Foundation, 2020.
- 5 The 2018 DAF Report. National Philanthropic Trust, 2018.
- 6 Candid, 2020. Includes giving by US-based private, community foundations, and grantmaking public charities that awarded at least one grant of \$1,000 or more to a MA-based recipient organization paid or authorized in 2017 available in the Candid database. Amount excludes grants awarded to private and community foundations.
- 7 Candid, 2019. Amount excludes grants awarded to private and community foundations.
- 8 U.S. Census Bureau; 2017 ACS 5-Year Estimates, Age and Sex (Table S0101). Retrieved from [factfinder.census.gov](http://factfinder.census.gov) on 1/2020.
- 9 U.S. Census Bureau; 2017 ACS 5-Year Estimates, Selected Economic Characteristics (Table DP03). Retrieved from [factfinder.census.gov](http://factfinder.census.gov) on 1/2020.
- 10 U.S. Census Bureau; 2017 ACS 5-Year Estimates, Educational attainment (Table S1501). Retrieved from [factfinder.census.gov](http://factfinder.census.gov) on 1/2020.
- 11 Feeding America; 2017 Map the Meal Gap. Overall and Child Food Insecurity by County. Retrieved from <http://map.feedingamerica.org/>.
- 12 National Low Income Housing Coalition; 2019 Housing Needs by State (Massachusetts). Retrieved from [nlihc.org](http://nlihc.org).
- 13 U.S. Census Bureau; 2017 ACS 5-Year Estimates, Tabulated using Household income by selected monthly owner costs as a percentage of household income in the past 12 months (Owner-occupied housing units); Household income by gross rent as a percentage of household income in the past 12 months (Renter-occupied housing units). Retrieved from [factfinder.census.gov](http://factfinder.census.gov) on 1/2020.
- 14 U.S. Census Bureau; 2017 ACS 5-Year Estimates, Veteran Status (Table S2101). Retrieved from [factfinder.census.gov](http://factfinder.census.gov) on 1/2020.

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