



VISION 2020

A CONTINUING
COMMITMENT
TO IMPACT:
The Boston
Foundation's
2020 Strategic
Direction

About the Boston Foundation

The Boston Foundation, Greater Boston's community foundation, is one of the largest community foundations in the nation, with net assets of some \$1 billion. In 2015, the Foundation and its donors made more than \$110 million in grants to nonprofit organizations and received gifts of nearly \$122 million. In celebration of its Centennial in 2015, the Boston Foundation launched the Campaign for Boston to strengthen the Permanent Fund for Boston, its endowment fund focused on addressing the most pressing needs of Greater Boston. The Foundation is proud to be a partner in philanthropy, with more than 1,000 separate charitable funds established by donors either for the general benefit of the community or for special purposes. The Boston Foundation also serves as a major civic leader, think tank and advocacy organization, commissioning research into the most critical issues of our time and helping to shape public policy designed to advance opportunity for everyone in Greater Boston. The Philanthropic Initiative (TPI), an operating unit of the Foundation, designs and implements customized philanthropic strategies for families, foundations and corporations both here and around the globe.

The Mission of the Boston Foundation

As Greater Boston's community foundation since 1915, the Boston Foundation devotes its resources to building and sustaining a vital, prosperous city and region, where justice and opportunity are extended to everyone. It fulfills this mission in three principal ways:

- 1:** Making grants to nonprofit organizations and designing special funding initiatives to address this community's critical challenges;
- 2:** Working in partnership with donors to achieve high-impact philanthropy; and
- 3:** Serving as a civic hub and center of information, where ideas are shared, levers for change are identified, and common agendas for the future are developed.

Values Statement

In everything we do, we seek to broaden participation, foster collaboration and heal racial, ethnic and community divisions.

A Message from Paul S. Grogan

The Boston Foundation's Next Chapter

Last month, we published a report on the work of the Boston Foundation from 2009 through 2014 under a strategic framework called *Thriving People, Vibrant Places*. In it, we reflect on the progress we made, the challenges we faced and the lessons we learned. It is our intention, through that report and this publication, to be as transparent as we can about how we serve Greater Boston as your community foundation.

Thriving People, Vibrant Places: A Five-Year Progress Report, which can be found on our website, was part of a strategic reflection process that we launched in 2015 to identify the priorities that would shape our direction going forward. We asked ourselves, as we have at other inflection points in the past, “Is the Boston Foundation fully harnessing its potential to serve and advance transformational change on behalf of the city and region? Are we all that we can be?”

Last year was also the Boston Foundation's 100th Anniversary and we marked that milestone in a number of ways. We set out to celebrate our history in the context of the history of the city itself and, in the process, discovered that it's almost impossible to separate the two. We also engaged people in conversations about the challenges our city and region face going forward. Through a series of public gatherings and forums, we explored issues such as income inequality, infrastructure and climate change. We asked, “What would it take for Boston to be America's most upwardly mobile city?”

Our Centennial was also an opportunity to reaffirm the central role and importance of the Foundation's endowment, the Permanent Fund for Boston, which provides the resources for our discretionary grant making and other work in Greater Boston. We launched the Campaign for Boston to help strengthen the Permanent Fund for Boston and we were gratified to receive \$192 million in outright gifts and bequest intentions. That campaign continues and we hope to strengthen our endowment even more in the years to come.

Now we are introducing our next chapter.

As we move forward, we are building on the impact we have had and applying the lessons we have learned to the course we are setting for our future. We are continuing our commitment to the major issues we care about deeply while also responding to expressed community needs.

I could not be more optimistic or excited about our prospects—and, whether you are a donor, a grantee, a public official, a business leader, a neighborhood activist or simply someone who cares deeply about the future of our city, I invite you join us.



Paul S. Grogan
President and CEO

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Key Lessons and Observations

As we look forward to our next chapter, we hope to build on what we have accomplished, guided by a series of lessons and observations.

The Boston Foundation has made real progress in some of the five impact areas we focused on during the five-year *Thriving People, Vibrant Places* strategic framework that we launched in 2009.

As we look forward to our next chapter, we hope to build on what we have accomplished, guided by a series of lessons and observations.

- **With our partners, we made great progress, even helping to create structural change and policy reform in some key areas of community life, especially when we applied all of our roles—as grant maker, civic leader and partner for high-impact philanthropy.** In other areas, we learned that real progress will require more time and commitment, especially given the complexity and magnitude of the social problems we seek to address.
- **In some cases, our strategies and approaches evolved.** We helped to launch new initiatives, including Success Boston, which focuses on college completion, while transitioning out of others, such as the youth violence prevention initiative StreetSafe Boston, which has merged with the City of Boston’s Violence Interrupter program.
- **During the Boston Foundation’s 100th Anniversary last year, the issue of economic inequality and opportunity was a major focus of our future-oriented conversations and events.** We highlighted the fact that Boston has created a powerhouse knowledge economy, but too many people are not benefiting from the extraordinary renaissance that has occurred here. Much of our past work has addressed this issue, and we hope to seek additional opportunities to highlight ways that we can work together to make Boston a city that champions upward mobility.
- **Our internal reflection also led us to decide that we will seek even closer partnerships with our donors for greater impact.** Many donors with Donor Advised Funds at the Boston Foundation have made grants that overlap with our discretionary grant making. Others have co-invested in our initiatives, such as Success Boston, or partnered with us to take action on a broader scale. For instance, donors Karen and Jim Ansara, in close partnership with the Boston Foundation, established the Haiti Fund in response to the devastating earthquake that hit that country in 2010. We seek to broaden and expand these donor partnerships.
- **Last, as we examined our discretionary grant making, we found that about one-fifth of our grants over the last five years were open and flexible to funding projects outside of our specific goals and strategies in our five impact areas.** Looking forward, we imagined ways we could continue to maintain an openness to new ideas and other emerging issues—a tradition that has been a treasured part of the Foundation’s historic role in the community.

Vision 2020: A Continuing Commitment to Impact

As a result of our strategic reflection, we have articulated three strategic priorities to guide our work through 2020.

1: We are reaffirming our strategic focus on our current five impact areas and two crosscutting strategies.

Our Five Impact Areas:

- Education
- Health & Wellness
- Jobs & Economic Development
- Neighborhoods & Housing
- Arts & Culture

Our Two Crosscutting Strategies:

- Nonprofit Effectiveness
- Supporting the Grassroots

We will also continue to offer general operating support to nonprofits that are closely aligned with our work in these areas.

2: We are maintaining open, flexible support for the community through a new program we are calling “Open Door Grants.”

Open Door Grants will be available to new or existing nonprofits for programs that are not directly aligned with the five impact areas, but do offer promising ideas and approaches in their fields. The Boston Foundation has a long tradition of seeding innovation and remaining responsive to ongoing and emerging needs. We want to continue to play that important role in our community.

3: We are staying open to additional opportunities for impact.

We will continue to scan for issues that have the potential to expand opportunity and mobility for our city and region in areas of shared interest with our donors. One initial area of exploration is early childhood, a period that has such an outsized influence on every person’s life.

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A Deep Commitment to Our Primary Roles in Greater Boston

Making Grants and Other Investments in Greater Boston's Nonprofits

The Boston Foundation's discretionary grant making relies on the resources of our endowment, the Permanent Fund for Boston, which represents some \$16 million of the Foundation's overall giving. We also make Program Related Investments (PRIs) in nonprofit ventures that involve the potential return of capital. Going forward, there will be two types of discretionary grants:

- *General operating support grants* to organizations that are closely aligned with our five impact areas, including Education, Health & Wellness, Jobs & Economic Development, Neighborhoods & Housing and Arts & Culture; and
- *Open Door Grants* for organizations and programs that do not align with our five impact areas, but do respond to the expressed needs of the community.

The Foundation also invests in crosscutting strategies that focus on Nonprofit Effectiveness and Grassroots leaders and organizations.

Increasing Impact Through Civic Leadership

The Foundation's five impact areas also guide our civic leadership activities, including:

- Commissioning and publishing cutting-edge research and using data gathered by the Boston Indicators Project;
- Acting as a convener through *Understanding Boston* forums and other events;
- Leveraging media and communications strategies to highlight the Foundation's work;
- Creating and convening task forces and broad-based coalitions to encourage policy change; and
- Developing public policy and legislation and lobbying for its passage.

The Foundation's civic leadership has led to groundbreaking reform legislation in K-12 education, attracting \$250 million in federal Race to the Top funds to the state. It also contributed directly to statewide community college reform and leveraged \$20 million in state funds for these important higher education institutions.

By playing a central role in the passage of municipal health care reform, it has saved hundreds of millions in resources for cities and towns and restored services and city jobs. It also has spurred thousands of units of new affordable housing through Smart Growth legislation. And it has garnered major funding for cultural facilities across the Commonwealth and had a profound impact on criminal justice reform.

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Going forward, we plan to engage our donors even more in the work we do through our Permanent Fund for Boston grant making.

Partnering with Donors and Other Funders for High-Impact Philanthropy

As the “go-to” place for high impact giving, the Boston Foundation works with hundreds of area philanthropists to help them meet their own philanthropic goals. We act as a partner in philanthropy and a charitable asset manager through which donors can conduct their giving.

In addition, foundations and corporations can easily access strategic advice through The Philanthropic Initiative. And, of course, donors contribute to our endowment, the Permanent Fund for Boston, our Civic Leadership Fund and other programmatic priorities to drive change in Greater Boston.

Going forward, we plan to engage with our donors even more on the work we do through our Permanent Fund for Boston grant making and the priorities outlined in the next part of this publication. We welcome donors with great ideas who want to make a difference in the city we all love.



Our work with donors and other funders include:

- **Donor Advised Funds**, which were introduced in the 1980s and have become a popular and fulfilling way for philanthropists who want a return on their investment. Aided by our donor services staff, we support our donors so that they can achieve their goals;
- Bequests and outright gifts to the **Permanent Fund for Boston**, Greater Boston’s endowment, which supports all of our competitive, discretionary grant making;
- Contributions to **the Civic Leadership Fund**, which fuels the research, forums and public policy work the Foundation engages in;
- Opportunities to partner and co-invest with the Foundation on priorities of common interest;
- Access to a full service philanthropic consultancy in **The Philanthropic Initiative**, which supports donors, foundations and corporations locally, nationally and globally to achieve lasting change.

The Five Impact Areas and Two Crosscutting Strategies

Fueled by the Permanent Fund for Boston

All of the work the Boston Foundation does in Greater Boston is fueled by our endowment, the Permanent Fund for Boston, which has been built over the last 100 years by generous, visionary and forward-thinking Bostonians. This crucial fund has provided the resources that have sparked positive change and nurtured new ideas over the last 100 years.

During the Boston Foundation’s Centennial year, in 2015, we launched a special *Campaign for Boston* to strengthen the Permanent Fund for Boston for today and for the future so that it will always provide the resources to meet the most pressing contemporary needs of the city and region.



EDUCATION



HEALTH & WELLNESS



JOBS & ECONOMIC DEVELOPMENT



NEIGHBORHOODS & HOUSING



ARTS & CULTURE



**CROSSCUTTING STRATEGIES:
NONPROFIT EFFECTIVENESS AND
GRASSROOTS**



Education

In the **Education** impact area, we will work to ensure that all residents have access to opportunity and that their education prepares them to flourish in our community and succeed in their careers. We work to strengthen the city's and region's education pipeline—from K-12 public education through college completion and career preparation. We do this in two primary ways:

K-12 Structural Reform

The goal of our work in the area of K-12 Structural Reform is to increase the number of high quality schools with site-based decision making, including key autonomies. We aim to continue to contribute to the transformation of the public education system by further raising or abolishing the cap on charter schools and encouraging autonomies throughout the system.

College Completion

We will scale the Success Boston College Completion Initiative to serve 1,000 students every year, including all Boston students attending community colleges, and seek to achieve a college completion rate of 70 percent for graduates of the Boston Public Schools who enroll in college, a goal that is extremely ambitious for any urban district.



Health & Wellness

Health & Wellness are the foundation for everything else in life and elude too many people in our city and state, especially low-income people of color. We will continue to strive to lower rates of overweight and obesity in Boston and Massachusetts, as well as reduce health care costs by encouraging a greater focus on prevention. This impact area focuses on three strategies:

Youth Physical Activity

We will continue to invest in programs and research that increase access to daily, quality school-based Youth Physical Activity, which furthers not only health in young people, but improved academic performance.

Early Childhood Obesity Prevention

In Early Childhood Obesity Prevention, we seek to ensure that all of our community's children have the advantage of a healthy start in life by supporting research-based efforts that address the causes—and the prevention—of obesity in early childhood through improved prenatal/neonatal care practices.

Health and the Social Environment

Through our Health and the Social Environment strategy, we will invest in efforts to reduce health disparities and health care costs by investing in cross-sector approaches that enhance community-clinical partnerships and address the social determinants of health throughout Greater Boston and the Commonwealth.





Jobs & Economic Development

The **Jobs & Economic Development** impact area works to provide equitable access to economic opportunities, with a specific focus on those who have traditionally been overlooked, including women and people of color. In this impact area we have three strategies:

Workforce Development

We will continue to support and expand effective Workforce Development initiatives, such as *SkillWorks: Partners for a Productive Workforce*.

Entrepreneurship

In this strategy, we invest in efforts that are helping to create an environment of support for inner-city Entrepreneurship.

Innovation Economy

Our goal is to increase the participation rate of women and under-represented minorities in Boston's growing Innovation Economy.

Neighborhoods & Housing

The **Neighborhoods & Housing** impact area seeks to make Boston and its surrounding communities affordable and accessible. It does this by pursuing two distinct, but complementary strands of work:

Housing

The Housing strategy works to fundamentally reform the systems that impede housing production and destabilize low-income families by investing in advocacy around land use reform and pilot initiatives that stabilize families in housing.

Neighborhoods

The Neighborhoods strategy supports communities adjacent to Boston's Fairmount Indigo Commuter Rail Line and builds their collective capacity to advocate for equitable development policies and become a political force recognized by state and local policymakers.

Arts & Culture

The **Arts & Culture** impact area is undergoing a period of strategic reflection to ensure that the Boston Foundation's work in this area directly addresses existing community needs and ecosystem gaps. This effort is informed by local and national research, more than 200 conversations with local leaders, stakeholders and practitioners in the arts and culture sector, as well as information gathered through the City's Boston Creates cultural planning process.

Our work in this area benefits from the information relayed in the *Understanding Boston* report *How Boston and 10 Other American Cities Support and Sustain the Arts*, researched and written by TDC and published by the Boston Foundation in February of 2016. The Boston Foundation's new strategy will include advocacy, policy, research, convening and grant-making components that will aim to reach artists, arts and culture programs and organizations across Greater Boston.





Crosscutting Strategies

Nonprofit Effectiveness

The Nonprofit Effectiveness Strategy aims to strengthen the Massachusetts nonprofit sector and enhance the impact of the Foundation's grantees. Our work in this area supports and promotes effective and sustainable nonprofits by focusing on three core competencies necessary for impact: **Leadership**, **Capacity** and **Resources**.

- Our leadership work focuses on developing and strengthening the sector's human capital;
- Our capacity building work bolsters the operational effectiveness of nonprofits, including their ability to collaborate; and
- Through the Giving Common, www.givingcommon.org, we facilitate and promote the data-driven strategic allocation of philanthropic resources.

Supporting the Grassroots

The Grassroots Strategy is designed to respond quickly and nimbly to community needs, with grants that range from \$200 to \$10,000 to grassroots organizations that are anchored in Boston's neighborhoods. These grants help people come together, establish relationships, strengthen political will, form caring connections, heal divides and build efficacy, clout and resilience. The Grassroots Strategy seeks to achieve the following goals: **Activate Grassroots Leaders**, **Seed Grassroots Ideas** and **Deepen Grassroots Connections**.

Types of Grants

We invite you to visit tbf.org/grants for detailed information and guidelines about how to apply for a grant from the Boston Foundation.

The Boston Foundation's five impact areas guide much of our grant making, research, convenings, public policy work and special initiatives. The resources for our discretionary grant making come from the Permanent Fund for Boston, which has been built over the years through gifts and bequests from Boston area donors who care deeply about our community.

Grants Aligned with Our Five Impact Areas

The Foundation invests the majority of its resources in proven or promising organizations and initiatives that seek to deepen their impact or bring their work to scale. We will continue to emphasize deep and long-lasting partnerships with nonprofits that are closely aligned with our five impact areas.



The Foundation also will continue the approach it introduced in 2009 by making general operating support grants to core partners on a rolling basis, without specific deadlines, as well as program and project grants where appropriate. It will also continue to support impactful work via its Nonprofit Effectiveness and Grassroots crosscutting strategies.

Open Door Grants

The Boston Foundation has created a clearer, more accessible process through which we can be responsive to the needs expressed by the community and support important organizations and promising ideas that do not align with the strategies, goals and approaches pursued within our five impact areas.

Beginning on March 22, 2016, both new and existing nonprofit organizations in Greater Boston can apply for Open Door Grants to support efforts to meet existing needs, including organizational capacity building as well as the testing of new ideas and innovations that address the most critical challenges and opportunities facing our community.

Open Door Grants consolidate and streamline several of the Foundation's existing individual grant-making programs.

There will be four deadlines every year and grants will be made for one year at a time and for up to two consecutive years. Generally, grants will range from \$10,000 to \$50,000 and will support:

- Innovative and emerging ideas for new or existing organizations;
- Proven ideas from existing organizations; and
- Capacity building for new and existing organizations.

See tbf.org/grants to learn more about the Foundation's funding opportunities.



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