UNITE TO CREATE POSITIVE, LASTING CHANGE.

Annual Report 2016 – 2017

UNITEDWAYMASSBAY.ORG
We unite to create positive, lasting change for people in need.

We call it harnessing the power of people working together.

We believe bringing together diverse groups – individuals, nonprofits, companies, and government agencies – is the most effective way to improve the lives of people in need.

We work every day to achieve our mission by focusing on two foundations of better lives: Financial Opportunity and Educational Success. Specifically:

**Financial Opportunity:** Ensuring that all families have safe housing, sufficient food and quality childcare. That they have jobs that allow them to support themselves and their families. And that they have access to financial tools and coaching to help build a better future.

**Educational Success:** Preparing children to enter school ready to learn, develop critical social and academic skills, and get the support they need to stay in school and graduate.
A YEAR OF CREATING POSITIVE, LASTING CHANGE.

LIVE UNITED is one of United Way’s core tenets and is deeply rooted in our organization’s history. Over 125 years ago, a small group of leaders from different faiths recognized the need to work together to make Denver a better place. They created the movement that would become United Way.

Today, LIVE UNITED means so much more than uniting different faiths to work together for the common good. It means bringing together individuals, businesses, government and nonprofit organizations on behalf of our region’s most vulnerable individuals, families and communities.

Together, we are creating financial opportunity and educational success for all in our region. We hope you enjoy reading about the impact of United Way’s innovative programs and initiatives in this year’s annual report.

We could not do this work without the leadership and support of our donors and volunteers. Deeply rooted problems—the achievement gap, poverty and homelessness—require the time and talents of a range of individuals and organizations, and we are incredibly grateful for their support.

Our time-tested way of working—forging unlikely partnerships and mobilizing resources to develop sustainable solutions—is more valuable than ever. People look to United Way to bring them together with opportunities to organize, build coalitions and effect positive change.

We’re proudly stepping forward, and we’re eager for the challenge. We know that tough issues require tough work, and that change doesn’t happen alone. It takes everyone fighting and pulling as one.

To all of our partners, donors, advocates and volunteers, thank you for being in the trenches with us this year. With your help, we will continue fighting to create lasting change that impacts countless lives, makes our region a better place and leaves an enduring mark on society.

Mike Durkin
Susan Esper
WHY UNITED WAY?

1. United Way harnesses the power of communities coming together to deliver lasting change.

We bring together individuals, businesses, government and nonprofits to take on complex, entrenched issues in our community and deliver innovative solutions.

Our Pay for Success initiative stands out as an example. When you consider all the complex factors that can contribute to a person becoming homeless – and the many obstacles people face to getting back on their feet – it’s no surprise that the overall homelessness numbers are trending upward over the past few decades.

But the Pay for Success initiative to end chronic homelessness in Massachusetts is proving that those numbers can be reversed. The innovative program is a partnership between the Commonwealth of Massachusetts and the Massachusetts Alliance for Supportive Housing, comprised of United Way of Massachusetts Bay and Merrimack Valley, the Massachusetts Housing and Shelter Alliance and Corporation for Supportive Housing.

Pay for Success leverages a mix of philanthropic funding and private investor capital from Santander Bank, CSH and United Way to provide the upfront funding for social services. Under the innovative financing model, if the goals of the Pay For Success initiative are met, the government compensates the investors for undertaking the investment risk. If the goals are not met, the government is not obligated to repay the investors. An independent evaluator, Root Cause, determines whether the Pay for Success initiative has achieved its goals.

Our innovative Pay for Success initiative is on track to create at least 500 units of stable, supportive housing for 800 chronically homeless individuals over six years.
Here's one example. Data collected at kindergarten entry shows that over one-third of all Boston school children enter unprepared to learn. Many have developmental delays that weren't identified or addressed early on. And while they may get help in school, it is often too late – their likelihood of graduating from high school is already significantly and negatively impacted.

Screening young children early on, and then connecting those children and their families to early intervention resources, can change that trajectory. DRIVE is a groundbreaking initiative for achieving universal child development screening for young children that uses an innovative model of teaching parents to screen children in their community for developmental delays.

The model allows them to reach parents of young children who are not in formal preschool or other educational settings. It also provides a pathway for parents of children with delays to access available services.

Ultimately, the network of screeners provide data that can influence city and state-wide conversations about early education needs. For example, this year, data provided by DRIVE screening revealed that many children in our region show gross motor skill delays. The data helped one agency apply for and receive funds to build a new playground.

Since its launch, our DRIVE initiative has screened nearly 6,000 young children in Greater Boston, helping to ensure they are developing on track and have the best foundation for learning.
Eight years ago, we broke new ground in philanthropy by implementing an innovative funding strategy that delivers a more meaningful return on community investment. Hailed by Root Cause as a “promising practice in philanthropy,” United Way aligned our network through the unrestricted funding of over 160 partner organizations under a set of common measures in order to track progress toward common goals.

In 2016, our portfolio of best-in-class nonprofit organizations continued to deliver large-scale results:

- More than **12,000 families** obtained safe, affordable housing or were stabilized to avoid homelessness
- More than **3,300 individuals** were placed in jobs
- More than **10,000 low-income children** received a high-quality, early education
- More than **5,000 families** participated in programs to help them better support their child’s development
- More than **6,800 young people** participated in youth leadership development programs
- More than **17,500 youth** participated in academic achievement or college readiness programs
Volunteers are the cornerstone of United Way’s work in the community. Last year, more than 8,000 people volunteered their time assembling literacy kits, packing healthy snack bags, conducting drives for food and back-to-school supplies, providing much needed landscaping and painting at our partner agencies, building playgrounds, mentoring new college students, coaching young entrepreneurs…and so much more. Here is a sampling of our signature volunteer community events in 2016:

Our **Thanksgiving Project** volunteers distributed 200,000 pounds of food to 6,500 families in 11 different communities across the region. Families, and businesses including UPS, Bank of America, Gillette and Blue Cross Blue Shield help pack and deliver the 6,500 meals each year.

Volunteers from Women United partnered with United Way to host our annual **Community Baby Shower** — in both Boston and the Seacoast region of New Hampshire — and served more than 200 families. Each year, United Way’s Community Baby Shower provides new and expecting mothers with essential tools and resources to support their baby’s development and learning.

*Since 2011, the Community Baby Shower has served more than 700 families.*
IMPACT HIGHLIGHTS

We are proud to celebrate our high-impact partnerships aimed at creating financial opportunity and ensuring educational success for families and children in our region. Your support powers innovative approaches to address complex issues in our region. The results are driving positive, lasting change for people in need.

BoSTEM aims to ensure 100% of Boston’s 10,000 middle school students have the opportunity to participate in hands-on STEM learning experiences by 2020. To date, BoSTEM has provided 1,500 students the chance to apply math and science skills in exciting, real-world contexts. Over 71% of students reported an increased interest in science.

Raised over $4 million for economic and community development through the **Community Investment Tax Credit**, which supports community development corporations across the state. In just the past two years, these CDCs have: built over 600 new affordable housing units, prevented more than 1,300 foreclosures and provided more than 11,600 individuals with financial coaching and financial education to help them build savings, reduce debt and improve credit scores.

Expanded our successful **North Shore AmeriCorps Program** to support the educational success of English language learners. Placed 25 AmeriCorps members in Lynn and Salem to provide academic and other supports to immigrant students. Last year, 60% of the participating students showed increased academic performance.

Expanded our **Summer Learning Collaborative** to 27 sites serving over 3,000 children grades K-3. Evaluations show 82% of participating children avoid summer learning loss and 70% advanced from the lowest reading level.

300 students participated in our **Youth Venture program**, a civic engagement and entrepreneurship program that awards competitive seed funding for youth-led social ventures. One team, Youth Unleashed, was selected as a 2017 MassChallenge Startup Accelerator.
Our Financial Stability Centers placed 277 people in jobs through services provided at our six financial opportunity centers located in Boston, Chelsea, Lawrence, Lynn and Quincy. Clients of our centers achieved an average monthly net income increase of $427 and an average credit score increase of 28 points.

Expanded DRIVE, our data-driven effort to screen infants, toddlers and preschoolers to ensure they are on track to succeed when they enter kindergarten. To date, DRIVE has screened over 4,500 children in Greater Boston. The Marian L. Heard Scholars are chosen not only for their academic skills, but their leadership in the community, desire to give back for the next generation, compassion for their peers and neighbors, and their family financial need.

Provided 89 students to date with a Marian L. Heard Scholarship to attend a four-year college or university. $200K yearly value to the community of United Way volunteers. Coordinated hundreds of volunteer projects for our corporate partners, from distributing 6,500 Thanksgiving meals to packing literacy kits for summer learning programs.

Earned Income Tax Credit. Partnered with Bank of America to provide free tax preparation services, helping over 3,000 individuals claim the tax credits and refunds they earned. Last year this resulted in over $6.2 million returned to the community. The Family Fund. Celebrated 40 years of our Family Fund providing emergency financial assistance to over 90,000 families for rent, food and utilities.
** IMPACT HIGHLIGHTS 

**Thought Leadership 
Expertise at the State House.** Leveraged $95 million last year for our priority issues, including increased state funding for early educators, workforce development programs, capital improvements to early education facilities, rental assistance to prevent homelessness and expansion of the successful Earned Income Tax Credit.

**Realizing Inter-generational Success through Education (RISE)**
Partnered with Lynn Public Schools and the Lynn Housing and Neighborhood Development to provide over 150 families that are homeless or in unstable housing with intensive support. Case managers work with the schools to identify homeless students, connect their families to financial opportunity services such as housing assistance, job training and financial coaching and provide students with tutoring and out-of-school time services.

**IF Challenge**
Awarded $55,000 in innovation prize funding and technical assistance to three organizations working to end family homelessness. The winning solutions include replication of a successful eviction prevention partnership with the Boston Housing Authority, the development of an “app” to help families easily find resources and assistance and researching the feasibility of expanding the earned income tax credit to help low-income working families pay for housing.

**MOVING FORWARD**
These achievements represent only a fraction of the good work you have helped make possible. We are looking forward to making even more progress against our strategic imperatives this year. Thank you for your leadership and support.
## UNITED WAY OF MASSACHUSETTS BAY, INC.

### STATEMENT OF FINANCIAL POSITION

June 30, 2017 (with Comparative Totals for 2016)

#### Assets

<table>
<thead>
<tr>
<th></th>
<th>2017 Unrestricted</th>
<th>2017 Temporarily Restricted</th>
<th>2017 Permanently Restricted</th>
<th>2016 Total</th>
<th>2016 Total</th>
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<tr>
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<td>$3,002,117</td>
<td>$3,367,112</td>
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<td>$9,581,845</td>
<td>$9,921,950</td>
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<td>$22,971,645</td>
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<td>$11,250,299</td>
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<td>$36,171,610</td>
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<td>Property and equipment, net</td>
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<td>$1,819,859</td>
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<td>Investments</td>
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<td>$5,336,745</td>
<td>$5,967,952</td>
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<tr>
<td>Investments in perpetual trusts</td>
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<td>$5,715,104</td>
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<tr>
<td>Other assets</td>
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<tr>
<td>Total assets</td>
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<td>$16,587,044</td>
<td>$11,683,056</td>
<td>$59,773,831</td>
<td>$64,900,135</td>
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#### Liabilities

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<tr>
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</thead>
<tbody>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$1,454,340</td>
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<td>Program initiatives payable</td>
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<td>$318,591</td>
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<td>Donor designations payable</td>
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<td>Total current liabilities</td>
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<td>Deferred rent and other</td>
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<td>$399,804</td>
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<td>Total liabilities</td>
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<td>$6,624,194</td>
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#### Net Assets

<table>
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<tr>
<td>General operations</td>
<td>$14,335,574</td>
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<td>$14,335,574</td>
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<tr>
<td>Property and equipment, net</td>
<td>$1,819,859</td>
<td>-</td>
<td>-</td>
<td>$1,819,859</td>
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<tr>
<td>Designated by the Board of Directors:</td>
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<tr>
<td>Stabilization fund</td>
<td>$375,479</td>
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<td>$375,479</td>
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<tr>
<td>Endowment fund</td>
<td>$4,716,731</td>
<td>$5,336,745</td>
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<td>$10,053,476</td>
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<tr>
<td>Program allocation reserves</td>
<td>$7,822,383</td>
<td>$6,627,617</td>
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<td>$14,450,000</td>
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<td>Donor restricted:</td>
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<tr>
<td>Endowment fund</td>
<td>-</td>
<td>$5,967,952</td>
<td>-</td>
<td>$5,967,952</td>
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<tr>
<td>Perpetual trusts and other</td>
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<td>$432,193</td>
<td>$5,715,104</td>
<td>$6,147,297</td>
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<tr>
<td>Total net assets</td>
<td>$29,070,026</td>
<td>$12,396,555</td>
<td>$11,683,056</td>
<td>$53,149,637</td>
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</tbody>
</table>

#### Total liabilities and net assets

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total liabilities and net assets</td>
<td>$31,503,731</td>
<td>$16,587,044</td>
<td>$11,683,056</td>
<td>$59,773,831</td>
</tr>
</tbody>
</table>

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See Independent Auditors' Report and accompanying notes to financial statements.
### UNITED WAY OF MASSACHUSETTS BAY, INC.
### STATEMENT OF ACTIVITIES

#### Year Ended June 30, 2017

<table>
<thead>
<tr>
<th></th>
<th>2017 Unrestricted</th>
<th>2017 Temporarily Restricted</th>
<th>2017 Permanently Restricted</th>
<th>2016 Total</th>
<th>2016 Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Public support:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Donor contributions</td>
<td>$ -</td>
<td>$ 35,553,158</td>
<td>$ -</td>
<td>$ 35,553,158</td>
<td>$ 37,620,406</td>
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<td>1,364,720</td>
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<td>5,992,215</td>
<td>9,781,578</td>
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<tr>
<td>In-kind revenue and other income</td>
<td>776,140</td>
<td>16,971</td>
<td>-</td>
<td>793,111</td>
<td>1,771,446</td>
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<td><strong>Gross total public support</strong></td>
<td>5,403,635</td>
<td>36,934,849</td>
<td>-</td>
<td>42,338,484</td>
<td>49,173,430</td>
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<tr>
<td><strong>Less:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net provision for uncollectible pledges</td>
<td>-</td>
<td>(1,486,167)</td>
<td>-</td>
<td>(1,486,167)</td>
<td>(1,708,985)</td>
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<tr>
<td>Donor designations, net of service fees</td>
<td>(41,000)</td>
<td>(11,536,722)</td>
<td>-</td>
<td>(11,577,722)</td>
<td>(12,490,124)</td>
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<tr>
<td><strong>Net total public support</strong></td>
<td>5,362,635</td>
<td>23,911,960</td>
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<td>29,274,595</td>
<td>34,974,321</td>
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<td><strong>Appropriated investment income</strong></td>
<td>2,211,968</td>
<td>518,032</td>
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<td>2,730,000</td>
<td>2,798,000</td>
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<tr>
<td><strong>Net assets released from restriction</strong></td>
<td>25,692,478</td>
<td>(25,692,478)</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td><strong>Total public support</strong></td>
<td>33,267,081</td>
<td>(1,262,486)</td>
<td>-</td>
<td>32,004,595</td>
<td>37,772,321</td>
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<tr>
<td><strong>Distributions and expenses:</strong></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Agency allocations and other distributions</td>
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<td>-</td>
<td>-</td>
<td>16,356,928</td>
<td>17,216,909</td>
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<tr>
<td>Grant expenses</td>
<td>7,412,502</td>
<td>-</td>
<td>-</td>
<td>7,412,502</td>
<td>9,409,864</td>
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<td><strong>Total distributions</strong></td>
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<td>-</td>
<td>23,769,430</td>
<td>26,626,773</td>
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<td><strong>Functional expenses:</strong></td>
<td></td>
<td></td>
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<td>Community services</td>
<td>6,154,527</td>
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<td>-</td>
<td>6,154,527</td>
<td>6,743,863</td>
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<td>Fundraising</td>
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<td>-</td>
<td>5,847,705</td>
<td>5,372,511</td>
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<td>Management and general</td>
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<td>-</td>
<td>-</td>
<td>2,457,284</td>
<td>2,571,814</td>
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<td><strong>Total functional expenses</strong></td>
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<td>-</td>
<td>-</td>
<td>14,459,516</td>
<td>14,688,188</td>
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<td><strong>Total distributions and expenses</strong></td>
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<td>-</td>
<td>38,228,946</td>
<td>41,314,961</td>
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<td><strong>Distributions and expenses in excess of public support</strong></td>
<td>(4,961,865)</td>
<td>(1,262,486)</td>
<td>-</td>
<td>(6,224,351)</td>
<td>(3,542,640)</td>
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<td><strong>Endowment, investment and other activities,</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>net amounts appropriated for operations:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment gain (loss), net of appropriated amounts</td>
<td>2,341,523</td>
<td>330,331</td>
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<td>2,671,854</td>
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<td>Bequests and charitable gift annuities</td>
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<td>333</td>
<td>-</td>
<td>121,893</td>
<td>298,981</td>
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<td>Perpetual trust income</td>
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<td>Unrealized gain (loss) on investments in perpetual trusts</td>
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<td>400,093</td>
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<td>(186,082)</td>
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<td>Loss on disposal of property and equipment</td>
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<td>(86,239)</td>
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<td><strong>Total increase (decrease) from endowment, investment and other activities</strong></td>
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<td>330,664</td>
<td>400,093</td>
<td>3,434,459</td>
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<td><strong>Increase (decrease) in net assets</strong></td>
<td>(2,258,163)</td>
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<td>61,517,285</td>
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<td><strong>Net assets, end of year</strong></td>
<td>$ 29,070,026</td>
<td>$ 12,396,555</td>
<td>$ 11,683,056</td>
<td>$ 53,149,637</td>
<td>$ 55,939,529</td>
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</tbody>
</table>

2016 BOARD OF DIRECTORS

Dewey J. Awad
Managing Director
Bain Capital/Brookside Capital

Phyllis Barajas
Executive Director
Conexion

Robert L. Beal
President
Related Beal

Jeffrey Bray
Vice President, Investor Relations
Rapid7

Ivy L. Brown
President
UPS - Northeast District

Polly Bryson
Partner
Terra Nova Partners, LLC

Jacques Carter, M.D.
Assistant Professor of Medicine
Harvard Medical School
Beth Israel Deaconess Medical Center

Phil Catchings

Liz Cheng
General Manager for Television
WGBH

Timothy J. Connelly
Executive Director
Massachusetts Technology Collaborative

Janet Cooper

Kristina Davis
Chair, Community Impact Committee
Partner
Deloitte & Touche LLP

Michael Doughty
President and General Manager,
John Hancock Insurance
John Hancock Financial Services

Michael K. Durkin
President and CEO
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We apologize in advance for any
misspellings or omissions.
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