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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

► Do not enter social security numbers on this form as it may be made public.
► Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No. 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , 2019, and ending ,

The Klarman Family Foundation
P.O. Box 171627
Boston, MA 02117

A Employer identification number: 04-3105768

B Telephone number (see instructions): 617-236-7909

C If exemption application is pending, check here ► ☐

D 1 Foreign organizations, check here ► ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ► ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ► ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 838,896,973.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d), must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	60,000,000.			
	2 Check ► ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1,111,029.	1,111,029.	N/A	
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	21,963,275.			
	b Gross sales price for all assets on line 6a 73,878,113.				
	7 Capital gain net income (from Part IV, line 2)		22,222,918.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule) See Statement 1	12,307,082.	12,059,429.		
	12 **Total.** Add lines 1 through 11	95,381,386.	35,393,376.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	416,077.			416,077.
	14 Other employee salaries and wages	1,459,472.	7,280.		1,452,192.
	15 Pension plans, employee benefits	436,336.	2,384.		433,952.
	16a Legal fees (attach schedule) See St 2	197,324.	103,841.		93,483.
	b Accounting fees (attach sch) See St 3	128,333.	27,714.		91,984.
	c Other professional fees (attach sch) See St 4	777,061.			777,061.
	17 Interest				
	18 Taxes (attach schedule)(see instrs) See Stm 5	267,978.			
	19 Depreciation (attach schedule) and depletion See Stmt 6	203,386.			
	20 Occupancy	637,313.			637,313.
	21 Travel, conferences, and meetings	163,428.			163,428.
	22 Printing and publications				
	23 Other expenses (attach schedule) See Statement 7	10,626,002.	9,981,961.		386,879.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	15,312,710.	10,123,180.		4,452,369.
	25 Contributions, gifts, grants paid Part XV	66,505,393.			66,505,393.
	26 **Total expenses and disbursements.** Add lines 24 and 25	81,818,103.	10,123,180.		70,957,762.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	13,563,283.			
	b **Net investment income** (if negative, enter -0-)		25,270,196.		
	c **Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash – non-interest-bearing	6,702,197.	7,911,187.	7,911,187.
	2 Savings and temporary cash investments	90,981,286.	76,735,998.	76,735,998.
	3 Accounts receivable ► 512,994.			
	Less: allowance for doubtful accounts ►		512,994.	512,994.
	4 Pledges receivable ►			
	Less: allowance for doubtful accounts ►			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch) ►			
	Less: allowance for doubtful accounts ►			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	7,000.	8,000.	8,000.
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) Statement 8	14,686,979.	25,820,666.	27,389,106.
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment: basis ►			
	Less: accumulated depreciation (attach schedule) ►			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) Statement 9	559,305,580.	574,385,555.	723,622,703.
	14 Land, buildings, and equipment: basis ► 1,474,723.			
	Less: accumulated depreciation (attach schedule) See Stmt 10 ► 784,804.	818,142.	689,919.	689,919.
	15 Other assets (describe ► See Statement 11)	2,027,066.	2,027,400.	2,027,066.
	16 **Total assets** (to be completed by all filers – see the instructions. Also, see page 1, item I)	674,528,250.	688,091,719.	838,896,973.
Liabilities	17 Accounts payable and accrued expenses	28,774.	28,960.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ►)			
	23 **Total liabilities** (add lines 17 through 22)	28,774.	28,960.	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here ► ☐ and complete lines 24, 25, 29, and 30.**			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ► ☒ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	674,499,476.	688,062,759.	
	29 **Total net assets or fund balances** (see instructions)	674,499,476.	688,062,759.	
	30 **Total liabilities and net assets/fund balances** (see instructions)	674,528,250.	688,091,719.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year – Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	674,499,476.
2	Enter amount from Part I, line 27a	2	13,563,283.
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	688,062,759.
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	688,062,759.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Statement 12			
b			
c			
d			
e			

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a				
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) ..... If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7	2	22,222,918.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8	3	0.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If 'Yes,' the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	64,101,167.	735,175,813.	0.087192
2017	50,226,432.	742,469,408.	0.067648
2016	44,786,479.	643,438,736.	0.069605
2015	42,730,059.	606,713,928.	0.070429
2014	38,338,274.	526,133,594.	0.072868

2	**Total** of line 1, column (d)	2	0.367742
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.073548
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	815,020,335.
5	Multiply line 4 by line 3	5	59,943,116.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	252,702.
7	Add lines 5 and 6	7	60,195,818.
8	Enter qualifying distributions from Part XII, line 4	8	71,032,924.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1 a	Exempt operating foundations described in section 4940(d)(2), check here ► [ ] and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary – see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► [X] and enter 1% of Part I, line 27b	1	252,702.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
3	Add lines 1 and 2	3	252,702.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	252,702.
6	Credits/Payments:		
a	2019 estimated tax pymts and 2018 overpayment credited to 2019 — 6a: 299,000.		
b	Exempt foreign organizations – tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 106,000.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	405,000.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached	8	1,465.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ►	9	0.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►	10	150,833.
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ► 150,833. **Refunded** ►	11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is 'Yes' to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ► $ 0. **(2)** On foundation managers ► $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		X
4 a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	X	
b	If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b	X	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by *General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If 'Yes,' complete Part II, col. (c), and Part XV	7	X	
8 a	Enter the states to which the foundation reports or with which it is registered. See instructions ► MA NY CA			
b	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G?* If 'No,' attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If 'Yes,' complete Part XIV.	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions ..... See Statement 13	11	X	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement. See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► www.klarmanfoundation.org

14 The books are in care of ► Beth Klarman Telephone no. ► 617-236-7909

Located at ► P.O. Box 171627 Boston MA ZIP + 4 ► 02117

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – check here ..... N/A ► ☐

and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X

See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country ►

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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

			Yes	No
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is 'Yes' to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ► ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ Yes ☒ No			
	If 'Yes,' list the years ► 20 _ _ , 20 _ _ , 20 _ _ , 20 _ _			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see instructions.)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20 _ _ , 20 _ _ , 20 _ _ , 20 _ _			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☒ Yes ☐ No			
b	If 'Yes,' did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	3b		X
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes? ☒ Yes ☐ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☒ Yes ☐ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b If any answer is 'Yes' to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		X
Organizations relying on a current notice regarding disaster assistance, check here ► ☐			
c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☒ Yes ☐ No			
If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
If 'Yes' to 6b, file Form 8870.			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No			
b If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? N/A.	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No			

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

1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Seth A. Klarman PO Box 171627 Boston, MA 02117	Trustee 5.00	0.	0.	0.
Beth S. Klarman PO Box 171627 Boston, MA 02117	Pres/Trustee 30.00	0.	0.	0.
Kim McCabe PO Box 171627 Boston, MA 02117	Exec. Dir. 40.00	336,000.	55,979.	0.
Steven Moore PO Box 171627 Boston, MA 02117	COO 40.00	24,098.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 — see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Laura Sherman PO Box 171627 Boston, MA 02117	Dir MA Grants 40	215,000.	52,126.	0.
Jonathan Horowitz PO Box 171627 Boston, MA 02117	Sr Prog Ofcr 40	190,000.	30,793.	0.
Karen Gill PO Box 171627 Boston, MA 02117	Dir Ops & Adm 32	131,767.	27,502.	0.
Erin Peterson PO Box 171627 Boston, MA 02117	Sr Grants Mgr 40	124,000.	29,974.	0.
Malka Travaglini PO Box 171627 Boston, MA 02117	Sr Prog Ofcr 40	113,000.	11,050.	0.

Total number of other employees paid over $50,000 ► 8

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Globalization Partners 265 Franklin Street, Suite 502 Boston, MA 02110	International consulting	160,234.
Isaacson Miller, Inc 263 Summer Street Boston, MA 02210	Executive search	104,524.
CFAR 1700 Market Street, Suite 2140 Philadelphia, PA 19103	Organizational strategy	104,375.
Nitasha Manchanda 89 Jordan Road Brookline, MA 02446	Science consultant	86,000.
Ropes & Gray 800 Boylston Street Boston, MA 02199-3600	Legal	85,493.
Total number of others receiving over $50,000 for professional services ►		1

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ►	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:				
a Average monthly fair market value of securities			1a	5,048,272.
b Average of monthly cash balances			1b	65,383,629.
c Fair market value of all other assets (see instructions)			1c	756,999,911.
d **Total** (add lines 1a, b, and c)			1d	827,431,812.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.		
2 Acquisition indebtedness applicable to line 1 assets			2	0.
3 Subtract line 2 from line 1d			3	827,431,812.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)			4	12,411,477.
5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	815,020,335.
6 **Minimum investment return.** Enter 5% of line 5			6	40,751,017.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ► ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6			1	40,751,017.
2a Tax on investment income for 2019 from Part VI, line 5	2a	252,702.		
b Income tax for 2019. (This does not include the tax from Part VI.)	2b	30,901.		
c Add lines 2a and 2b			2c	283,603.
3 Distributable amount before adjustments. Subtract line 2c from line 1			3	40,467,414.
4 Recoveries of amounts treated as qualifying distributions			4	
5 Add lines 3 and 4			5	40,467,414.
6 Deduction from distributable amount (see instructions)			6	
7 **Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	40,467,414.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	70,957,762.
b Program-related investments – total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	75,162.
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 **Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	71,032,924.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	252,702.
6 **Adjusted qualifying distributions.** Subtract line 5 from line 4	6	70,780,222.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				40,467,414.
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only			0.	
b Total for prior years: 20 ___, 20 ___, 20 ___		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014 ... 12,411,363.				
b From 2015 ... 12,672,685.				
c From 2016 ... 12,825,930.				
d From 2017 ... 13,184,280.				
e From 2018 ... 27,776,522.				
f **Total** of lines 3a through e	78,870,780.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► $ 71,032,924.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required – see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2019 distributable amount				40,467,414.
e Remaining amount distributed out of corpus	30,565,510.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	109,436,290.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount – see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required – see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	12,411,363.			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	97,024,927.			
10 Analysis of line 9:				
a Excess from 2015 ... 12,672,685.				
b Excess from 2016 ... 12,825,930.				
c Excess from 2017 ... 13,184,280.				
d Excess from 2018 ... 27,776,522.				
e Excess from 2019 ... 30,565,510.				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test — enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c 'Support' alternative test — enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

See Statement 14

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

None

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

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

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

See Statement 15

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

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

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

See Statement for Line 2a

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
See attachment to Pt XV, Ln 3a [State and zip for e-filing purposes] MA 02117	N/A		See attachment to Part XV, Ln 3a	66,505,393.
Total ► **3a**				66,505,393.
b *Approved for future payment*				
See attachment to Pt XV, Ln 3b [State and zip for e-filing purposes] MA 02117	N/A		See attachment to Part XV, Ln 3b	29,360,677.
Total ► **3b**				29,360,677.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions.)
1 Program service revenue:					
a Interest income from PRI					19,975.
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1,111,029.	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory	525990	-259,643.	18	22,222,918.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a Passthrough K-1 income	525990	238,102.	14	10,827,004.	
b Section 965 inclusion	525990	59.	1	21,530.	
c State tax refund			1	509.	
d Subpart F income			14	1,199,903.	
e					
12 Subtotal. Add columns (b), (d), and (e)		-21,482.		35,382,893.	19,975.
13 **Total.** Add line 12, columns (b), (d), and (e)				13	35,381,386.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
1a	Home Funders was created to address the unprecedented crisis in affordable housing for very low income families in Massachusetts, based on the belief that without adequate housing, all other social investments are at risk. The fund provides low-cost financing to low-income housing projects. Loans are used to help finance new construction, foreclosed properties that are redeveloped to include units for extremely low income families as well as for the preservation of "expiring use" rental units.

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1 a (1)		X
(2) Other assets	1 a (2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)		X
(3) Rental of facilities, equipment, or other assets	1 b (3)		X
(4) Reimbursement arrangements	1 b (4)		X
(5) Loans or loan guarantees	1 b (5)		X
(6) Performance of services or membership or fundraising solicitations	1 b (6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1 c		X

d If the answer to any of the above is 'Yes,' complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If 'Yes,' complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

▶ Electronically Filed — Signature of officer or trustee — Date

▶ Pres./Trustee — Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Kurt Coburn	Kurt Coburn	11/4/20		P01638285

Firm's name ▶ Blazek & Vetterling — Firm's EIN ▶ 76-0269860

Firm's address ▶ 2900 Weslayan, Suite 200, Houston, TX 77027 — Phone no. (713) 439-5739

Schedule B

(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
► **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2019

Name of the organization	**Employer identification number**
The Klarman Family Foundation	04-3105768

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
Form 990-PF	☐ 527 political organization
	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . ►$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization: The Klarman Family Foundation

Employer identification number: 04-3105768

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Seth A. Klarman PO Box 171627 Boston, MA 02117	$ 60,000,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization: The Klarman Family Foundation

Employer identification number: 04-3105768

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	N/A	$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		$	

Name of organization: The Klarman Family Foundation

Employer identification number: 04-3105768

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

Statement 1
Form 990-PF, Part I, Line 11
Other Income

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
Interest income from PRI	$ 19,975.	$ 19,975.	
Passthrough K-1 income	11,065,106.	10,818,080.	
Section 965 inclusion	21,589.	21,471.	
State tax refund	509.		
Subpart F income	1,199,903.	1,199,903.	
Total	$12,307,082.	$12,059,429.	$ 0.

Statement 2
Form 990-PF, Part I, Line 16a
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Administrative matters & other	$ 76,193.			$ 76,193.
Grant-related matters	10,990.			10,990.
Investment-related matters	103,841.	$ 103,841.		
Tax matters	6,300.			6,300.
Total	$ 197,324.	$ 103,841.		$ 93,483.

Statement 3
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bookkeeping and fiscal mgmt	$ 73,210.			$ 73,210.
Investment accounting	22,570.	$ 22,570.		
Payroll services	4,995.			4,995.
Tax compliance	27,558.	5,144.		13,779.
Total	$ 128,333.	$ 27,714.		$ 91,984.

Statement 4
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Executive search services	$ 104,524.			$ 104,524.
Grant management system consulting	26,730.			26,730.
Human resources/benefit consulting	172,472.			172,472.
Information technology services	35,775.			35,775.

Statement 4 (continued)
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Organizational strategy consulting	$ 104,375.			$ 104,375.
Program consulting and evaluation	84,110.			84,110.
Program planning and facilitation	87,883.			87,883.
Public relations services	39,549.			39,549.
Scientific advisors	121,643.			121,643.
Total	$ 777,061.	$ 0.		$ 777,061.

Statement 5
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Excise tax	$ 267,728.			
New York Corporation Tax	250.			
Total	$ 267,978.	$ 0.		$ 0.

Statement 6
Form 990-PF, Part I, Line 19
Allocated Depreciation

Date Acquired	Cost Basis	Prior Yr Depr	Method	Rate	Life	Current Yr Depr	Net Invest Income	Adjusted Net Income
Equipment								
Various	241,196	74,873	S/L		3	70,811	0	0
Furniture								
Various	456,234	324,518	S/L		5	54,743	0	0
Leasehold improvements								
Various	777,293	206,272	S/L		10	77,832	0	0

Statement 7
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Dues, memberships & subscriptions	$ 217,711.			$ 217,711.
Insurance	17,349.			17,349.
Office supplies	70,137.			70,137.
Passthrough K-1 expenses	10239123.	$ 9,981,961.		
Repairs and maintenance	12,554.			12,554.
State filing fees	1,000.			1,000.

Statement 7 (continued)
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Technology expense	$ 68,128.			$ 68,128.
Total	$ 10626002.	$ 9,981,961.		$ 386,879.

Statement 8
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
222,448 shares Boston Omaha Corporation	Cost	$ 4,686,979.	$ 4,680,306.
Foghorn Therapeutics Inc	Cost	5,000,000.	5,000,000.
Gwynnie Bee Inc Series A-4	Cost	118,985.	349,856.
Gwynnie Bee Inc Series A-5	Cost	195,415.	493,472.
Gwynnie Bee Inc Series A-8	Cost	4,685,600.	5,731,786.
Celsius Therapeutics Inc.	Cost	5,907,692.	5,907,692.
DynamiCare	Cost	700,000.	700,000.
Imagry, Inc.	Cost	2,500,000.	2,500,000.
Reflow Medical	Cost	2,025,995.	2,025,994.
	Total	$ 25,820,666.	$ 27,389,106.

Statement 9
Form 990-PF, Part II, Line 13
Investments - Other

Other Investments	Valuation Method	Book Value	Fair Market Value
See attachment	Cost	$ 574385555.	$723,622,703.
	Total	$ 574385555.	$723,622,703.

Statement 10
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Furniture and Fixtures	$ 456,233.	$ 379,260.	$ 76,973.	$ 76,973.
Machinery and Equipment	241,196.	121,440.	119,756.	119,756.
Improvements	777,294.	284,104.	493,190.	493,190.
Total	$ 1,474,723.	$ 784,804.	$ 689,919.	$ 689,919.

Statement 11
Form 990-PF, Part II, Line 15
Other Assets

	Book Value	Fair Market Value
PRI - Home Funders LLC	$ 29,857.	$ 29,523.
PRI - Home Funders Loan	1,997,543.	1,997,543.
Total	$ 2,027,400.	$ 2,027,066.

Statement 12
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	From Sch K-1 (Form 1065)			
2	Distributions in excess of basis			
3	TBC Partners LP	Purchased	Various	Various
4	Kensico Offshore Fund	Purchased	Various	12/31/2019
5	Kensico Offshore Fund II	Purchased	Various	12/31/2019
6	Greenlight Capital Offshore Investors	Purchased	Various	7/01/2019

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i)-(j)	(l) Gain (Loss)
1	2419179.		0.	2419179.				$ 2419179.
2	383,429.		0.	383,429.				383,429.
3	632,943.		1215658.	-582,715.				-582,715.
4	42096521.		22961191.	19135330.				19135330.
5	12000000.		8338664.	3661336.				3661336.
6	16346041.		19139682.	-2793641.				-2793641.
							Total	$22222918.

Statement 13
Form 990-PF, Part VII-A, Line 11
Controlled Entity Transfers

Transfers To Controlled Entity

Controlled Entity Name:	Commodore Capital Offshore Ltd.
Address:	P.O. Box 309 Ugland House
Address:	Grand Cayman, KY1-1104 Cayman Islands
Federal EIN:	98-1534696
Description of Transfer:	Contribution to investment fund. Entity is not a business enterprise, per IRC §4943(d)(3)(B).
Amount of Transfer:	$ 10,000,000.
Total	$ 10,000,000.

Statement 14
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

Seth A. Klarman
Beth S. Klarman

Statement 15
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:	Instrument Fund
Name:	Laura Sherman
Care Of:	The Klarman Family Foundation
Street Address:	PO Box 171627
City, State, Zip Code:	Boston, MA 02117
Telephone:	617-236-7909
E-Mail Address:	instrumentfund@klarmanfoundation.org
Form and Content:	The majority of the Klarman Family Foundation's grant making is done on an invitation-only basis. The two exceptions are the Foundation's Instrument Fund and its Grant program in Eating Disorders Research. More detailed information about applying to these programs can be found on the foundation's website: www.klarmanfoundation.org.
Submission Deadlines:	See www.klarmanfoundation.org
Restrictions on Awards:	See www.klarmanfoundation.org

Name of Grant Program:	Eating Disorders Research
Name:	Kim McCabe
Care Of:	The Klarman Family Foundation
Street Address:	PO Box 171627
City, State, Zip Code:	Boston, MA 02117
Telephone:	617-236-7909
E-Mail Address:	edresearch@klarmanfoundation.org
Form and Content:	The majority of the Klarman Family Foundation's grant making is done on an invitation-only basis. The two exceptions are the Foundation's Instrument Fund and its Grant program in Eating Disorders Research. More detailed information about applying to these programs can be found on the foundation's website: www.klarmanfoundation.org.
Submission Deadlines:	See www.klarmanfoundation.org
Restrictions on Awards:	See www.klarmanfoundation.org

The Klarman Family Foundation **04-3105768**
2019 Form 990-PF

Attachment to Part I, Line 6 - Net Capital Gain/Loss

	Proceeds	Cost	Gain/Loss
Amounts reported in Part IV	$ 73,878,113	51,655,195	$ 22,222,918
Passthrough K-1 short-term capital gain/(loss) UBTI			(418,028)
Passthrough K-1 long-term capital gain/(loss) UBTI			273,619
Passthrough K-1 751 gain/(loss) UBTI			20,943
Passthrough K-1 1231 gain/(loss) UBTI			1,979
Passthrough K-1 1256 gain/(loss) UBTI			(138,157)
Total Gain/Loss per Part I, Line 6			$ 21,963,275

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
83 North II LP	$ 1,195,684	$ 1,352,264
Abrams Capital Partners I, LP	34,937,655	32,308,025
Abrams Capital Partners II, LP	40,601,067	36,009,076
Al Bawader Investment Fund LP	168,272	161,889
Amiti III LP	189,747	250,000
Arbiter Partners, LP	7,809,120	7,696,906
Arbiter Special Opportunities Fund II	20,254,118	22,644,987
Attestor Value Fund LP	52,017,288	59,565,261
Baupost Value Partners, L.P. - IV	50,000,000	50,000,000
Berkshire Fund IX-A (IND) LP	1,263,387	1,408,091
Berkshire Fund IX-A IND VP AIV LP	19,032	19,942
Berkshire Fund VII (OS) LP	-	170
Berkshire Fund VII LP	-	21,934
Berkshire Fund VIII (IND) LP	761,829	1,435,347
Boulderado Partners, LLC	-	115,900
BoxGroup Four LP	462,145	493,750
BoxGroup More LP	590,695	617,188
Brizo Capital Partners	2,541,018	2,592,176
Brookside Capital Partners Fund LP	11,352,041	13,417,016
Columbus Hill Partners, LP	14,320,795	16,469,784
Commodore Capital Offshore Ltd.	11,199,903	13,406,966
Covalent Capital Partners, LP	581,676	533,716
Cross Shore Overseas	2,500,000	2,732,342
Cue Ball Capital, LP	1,808,526	2,025,288
EcoR1 Capital Fund, LP	14,152,052	14,918,171
EcoR1 Venture Opportunity Fund, LP	4,991,505	6,554,395
FIMI Opportunity 6, LP	1,857,906	2,647,000
FIMI Opportunity V, LP	3,289,379	6,577,000
Finepoint Capital Partners II, LP	11,045,778	10,630,191
Flare Capital Partners I LP	1,171,471	1,963,029
Flare Capital Partners II LP	170,583	184,535
Flybridge Capital Partners II, LP	154,578	20,820
Flybridge Capital Partners III, LP	-	317,423
Flybridge Capital Partners IV, LP	722,797	1,427,223
GC Entrepreneurs Fund II, LP	3,028	2,560

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
GC Entrepreneurs Fund IV LP	6,449	44,439
Greenlight Capital Offshore (Gold), Ltd	860,318	860,318
Hawkeye Capital Institutional LP	6,798,148	6,861,966
Hayman Capital Partners, LP	1,877,282	1,709,609
Highfields Capital IV LP	137,483	197,341
Jeereddi I, LP	4,025,732	6,680,042
JHL Capital Group Fund LLC	1,275,661	3,029,565
Kensico Offshore Fund	42,038,809	77,072,987
Kensico Offshore Fund II	24,500,336	35,257,930
Magma Venture Capital III, LP	1,712,354	12,363,524
Magma Venture Capital IV, LP	3,704,827	6,153,642
MFN Partners, LP	42,785,640	43,181,823
Newtyn TE Partners, LP	14,315,995	15,499,770
Ostra Capital Partners, LP	11,961,445	13,009,338
Perry Partners, LP	295,939	419,538
Pitango Growth Fund I, LP	1,841,912	2,936,462
Pitango Venture Capital Fund VI, LP	1,612,965	4,608,902
Pitango Venture Capital Fund VII, LP	1,358,755	3,149,538
Raffles Associates LP	3,904,209	2,204,040
Rise of the Rest Seed Fund II LP	171,346	170,287
Riva Capital Partners LP	30,695	6,463
Riva Capital Partners V, LP	2,220,594	2,220,512
Route One Fund I, LP	31,855,928	41,139,243
S Capital LP	1,856,971	2,002,602
S Capital Opportunity Fund	731,240	718,914
Sessa Capital International Fund	2,000,000	4,512,100
Slate Path Partners LP	25,821,682	35,386,458
Swiftcurrent Offshore Ltd	7,500,000	9,967,238
Takwin Labs	931,756	1,199,248
The PrivatVarde Fund, LP	173,022	509
The Spruce House Partnership LP	33,641,170	71,520,786
The Varde Fund IX, LP	134,225	36,650
The Varde Fund LP	230,001	6,583
The Varde Fund VII, LP	474,036	13,697
The Varde Fund VIII, LP	358,417	12,155
The Varde Fund X (B) (Feeder), LP	3,385,627	2,482,994

Part II, Line 13 - Other Investments

	Book Value	Fair Market Value
Third Rock Ventures V	1,058,940	1,105,060
TLV Partners II, LP	1,476,318	2,024,981
Varde Investment Partners, LP	2,443,489	2,585,084
XFactor 1, a series of XFactor Ventures, LP	497,357	500,000
XFactor 2, a series of XFactor Ventures, LP	245,407	250,000
Total Part II, Line 13 - Other Investments	**$ 574,385,555**	**$ 723,622,703**

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2019 or which had reports outstanding during 2019:

(i)	**Grantee:**	Home Funders Collaborative LLC ("Home Funders") 75 Arlington St 3rd Floor, Boston, MA 02116
(ii)	**Date and Amount of Grant:**	10/11/18 $5,250 4/5/19 $2,012.50
(iii)	**Purpose of Grant:**	To support legal and other costs incurred in documenting and implementing a services agreement with The Boston Foundation. The Home Funders mission is to support the creation of housing for extremely low-income families in a mixed income housing environment.
(iv) & (vi)	**Reports of Amounts Expended:**	Home Funders submitted a complete report of its expenditure of the grant funds on 8/20/19.
(v)	**Diversions:**	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
(vii)	**Verification:**	The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2019 or which had reports outstanding during 2019:

(i)	**Grantee:**	Home Funders Collaborative LLC ("Home Funders") 75 Arlington St 3rd Floor, Boston, MA 02116
(ii)	**Date and Amount of Grant:**	7/24/19 $9,487.50 9/11/19 $6,999.75 10/24/19 $575.00
(iii)	**Purpose of Grant:**	To support legal and other costs incurred in documenting and implementing a services agreement with The Boston Foundation. The Home Funders mission is to support the creation of housing for extremely low-income families in a mixed income housing environment.
(iv) & (vi)	**Reports of Amounts Expended:**	Home Funders is expected to submit a complete report of its expenditure of the grant funds by 6/1/20.
(v)	**Diversions:**	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
(vii)	**Verification:**	The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2019 or which had reports outstanding during 2019:

(i)	**Grantee:**	Strategic Grant Partners ("SGP") 177 Huntington Ave, Suite 1500, Boston, MA 02115
(ii)	**Date and Amount of Grant:**	7/19/18 $660,268 12/6/18 $428,552
(iii)	**Purpose of Grant:**	To support SGP in achieving its purpose of providing pro bono consulting services and financial support to organizations with outstanding leadership and game-changing ideas that improve the lives of struggling individuals and families.
(iv) & (vi)	**Reports of Amounts Expended:**	SGP submitted a complete report of its expenditure of the grant funds on 11/15/19.
(v)	**Diversions:**	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
(vii)	**Verification:**	The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for grants paid during 2019 or which had reports outstanding during 2019:

(i)	**Grantee:**	Strategic Grant Partners ("SGP") 177 Huntington Ave, Suite 1500, Boston, MA 02115
(ii)	**Date and Amount of Grant:**	7/10/19 $453,870 12/18/19 $218,242
(iii)	**Purpose of Grant:**	To support SGP in achieving its purpose of providing pro bono consulting services and financial support to organizations with outstanding leadership and game-changing ideas that improve the lives of struggling individuals and families.
(iv) & (vi)	**Reports of Amounts Expended:**	SGP is expected to submit a complete report of its expenditure of the grant funds by 11/15/20.
(v)	**Diversions:**	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
(vii)	**Verification:**	The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part VII-B, Line 5c – Expenditure Responsibility

Pursuant to IRC Regulation 53.4945-5(d)(2), the Foundation provides the following information for one program related investment:

(i)	**PRI Recipient:**	Home Funders Collaborative LLC ("Home Funders") 75 Arlington St 3rd Floor, Boston, MA 02116
(ii)	**Date and Amount of PRI:**	6/10/2009 $375,000 6/24/2011 $300,000 6/22/2012 $200,000 8/15/2012 $100,000 10/31/2012 $116,667 2/8/2013 $100,000 6/24/2013 $289,916 3/10/2014 $150,000 3/12/2015 $225,000 12/16/2015 $143,417
(iii)	**Purpose of PRI:**	The Home Funders mission is to support the creation of housing for extremely low-income families in a mixed income housing environment. The investment has A 20 year term for an amount up to $ 2 million, for which the first capital call was paid in 2009. Funds are disbursed to Home Funders as real estate closings occur, which subsequently flow to finance a 20 year permanent loan to an affordable housing project. As of 12/31/15 the Foundation had fully disbursed this commitment.
(iv) & (vi)	**Reports of Amounts Expended:**	Home Funders submitted a complete report on the following dates in 2019 of the type ordinarily required by commercial investors under similar circumstances: 11/08/2019 This investment remained on the Foundation's books as of 12/31/19.
(v)	**Diversions:**	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the investment was originally made.
(vii)	**Verification:**	The grantor has no reason to doubt the accuracy or reliability of the reports from the grantee; therefore, no independent verification of the reports was made.

Part XV, Line 3a – Grants and Contributions Paid During the Year

The Klarman Family Foundation seeks to identify areas of unmet need and to advance solutions to addressing them. We believe passionately in the promise and importance of creative thinking, strategic leadership and strong organizations to help bring about change. Our intention as a Foundation is to help make measurable progress in improving the lives of others.

Our work is guided by the following principles and values:

- We approach our work with a seriousness of purpose and evaluative rigor, and with an openness to tackle issues in new ways and the flexibility to make adjustments along the way.
- Because society's problems seem to be compounding rapidly, we approach our work with a sense of urgency and willingness to invest based on the opportunities to make a difference rather than the limits of an annual grant-making budget.
- We believe that the preservation of democratic norms lies at the core of all of our work, and that a healthy democracy is crucial to all we seek to achieve.
- We value acting in partnership with other funders. We view these relationships as opportunities to learn and leverage greater impact. We apply what we learn to improve our philanthropic practices and outcomes.
- We make funding decisions based on careful review of an organization's strategies and effectiveness, leadership and financial position. Our funding is intended to strengthen organizations, often through unrestricted support, so that they can make a measurable difference in pursuing their goals.

The Foundation's grant making spans several areas of interest. The issues we are addressing are complicated, requiring new and creative thinking and persistence over time. As we are committed to learning and assessing our impact, these categories and our specific strategies within them will evolve. Our dedication to applying best practices in philanthropy will remain unchanged.

Current categories of grant making:

Good Philanthropic Citizen and Community Grants: The Foundation works to expand access to the critical services and enrichment opportunities that help make communities stronger, healthier and more vibrant. While the majority of grants in this category focus on Greater Boston as well as on the Jewish community, the Foundation also values the role it can play within some national and global contexts, acting nimbly as opportunities or needs arise. 11,801,600

Grants in this category cluster around long-standing philanthropic interests such as bolstering a safety net, ensuring access to opportunities for vulnerable families, and promoting democratic ideals. Over time, new strategies may emerge from this category.

Healthy Democracy: The Foundation has a long-standing commitment to addressing hatred, bigotry and intolerance which, we know from history, endangers the fabric of civil society and threatens democracy. A healthy democracy is built upon a commitment to treating all people fairly and equally under the law, and on an inclusive society where people know, trust and care about the common good. The Foundation takes a long-term approach to strengthening democracy with grantmaking focused on: strengthening equal protection under the rule of law; rebuilding trust in news, science and facts; rebuilding confidence in democratic institutions and the roles and responsibilities for citizen participation; strengthening accountability of government institutions, and; building social cohesion within and across communities.	15,950,000
Medical and Scientific Research: The Foundation invests in research efforts to advance understanding of the biological basis of health and illness with current interests including anorexia nervosa . The Foundation's grant making seeks to advance basic science research, to help create resources that are broadly available for the scientific research community, and to strengthen collaborative efforts in order to accelerate discovery.	14,731,214
Funder Collaborations and Bold Bets: The Foundation values working in partnerships as an effective means to increase learning, build capacity and maximize impact. In addition, the Foundation supports a small number of organizations, outside of current areas of interest, led by extraordinary leaders whose bold ideas and comprehensive plans to scale initial outcomes hold significant promise for positive, wide scale impact.	6,106,119
Children's Mental Health: The Foundation believes that the path to improving access and connection to high-quality children's mental health care requires a comprehensive, integrated and equitable system of care. The Foundation's grantmaking prioritizes interventions that are evidence-informed or rooted in best-practice, outcomes-driven, timely, culturally relevant, trauma-informed, delivered by a well-trained and retained workforce, and offered where children live, learn, and already receive care.	4,045,000
Arab Israeli Employment and Education: The Foundation is committed to improving the quality of life and access to opportunities for Israel's Arab citizens, and to ensuring a strong Jewish and democratic state in which all citizens might participate in the country's economic growth. The Foundation's grant making focuses on increasing access to and success in higher education, leadership development and professional employment for Arabs in Israel.	4,075,000

Connections to Israel: The Foundation believes Israel is essential to the Jewish experience, and that Israel's significance extends beyond its importance to the Jewish people. It is a dynamic, diverse and democratic society, with an entrepreneurial spirit that has enabled it to make a positive global impact in many fields, including science, technology and medicine. The Foundation supports engaging educational experiences that build authentic relationships between Americans and their Israeli peers.	1,850,000
Music Pathways for Youth: The Foundation believes in the power of music education to enrich the lives of individuals. It seeks to create a stronger, more accessible music pathway so that young people in Greater Boston and across Massachusetts, regardless of their financial means, can pursue music training - from beginner to mastery - according to their highest level of interest and ability. In addition to providing operating support grants to high quality, music education programs, the Foundation addresses other barriers such as lack of access to appropriate instruments and limited professional development opportunities for music educators and teaching artists to strengthen their ability to teach and mentor students along the music pathway.	3,202,000
Other Grants and Contributions: This category includes contributions made through the Foundation's employee matching gifts program, conference sponsorships, grants to organizations that no longer fit with the Foundation's areas of interest, and capital grants that are not associated with a specific Foundation strategy.	4,744,460
	$66,505,393

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Good Philanthropic Citizen and Community Grants			
Action for Boston Community Development, Inc. 178 Tremont Street 10th Floor Boston, MA 02111	PC	To support the SummerWorks program in summers 2018, 2019 and 2020	$ 50,000
Action for Boston Community Development, Inc. 178 Tremont Street 10th Floor Boston, MA 02111	PC	To support the Fuel Assistance Program for fiscal years 2020, 2021 and 2022	25,000
American Jewish World Service, Inc. 45 West 36th St. New York, NY 10018	PC	To support the International Grantmaking program and the Reserve Fund for fiscal years 2016, 2017, 2018, and 2019	250,000
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	Unrestricted operating support	20,000
Boston After School & Beyond, Inc. 89 South Street Boston, MA 02111	PC	Unrestricted operating support and the Summer Learning Project for fiscal years 2020 and 2021	100,000
Boston Ballet, Inc. 19 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and working capital fund for fiscal years 2018 - 2022	250,000
Boston Foundation, Inc. 75 Arlington Street 3rd Floor Boston, MA 02116	PC	To support the Housing and Neighborhoods program, including work in support of extremely low income families, for fiscal years 2020 - 2024	30,000
Boston Foundation, Inc. 75 Arlington Street 3rd Floor Boston, MA 02116	PC	To support the Civic Leadership Fund for fiscal years 2020, 2021 and 2022	50,000
Boston Health Care for the Homeless Program, Inc. 780 Albany Street Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2016, 2017, 2018 and 2019	50,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Boston Jewish Film Inc 1001 Watertown St West Newton, MA 02465	PC	Unrestricted operating support for fiscal years 2018 and 2019	15,000
Boston Landmarks Orchestra Inc 545 Concord Avenue Suite 318 Cambridge, MA 02138	PC	Unrestricted operating support	50,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 02118	PC	Unrestricted operating support	30,000
Boys and Girls Clubs of Boston, Inc. 200 High Street, 3rd Floor Boston, MA 02110-3045	PC	Unrestricted operating support for fiscal years 2018, 2019, 2020, and 2021	250,000
Brigham & Women's Hospital 75 Francis Street Boston, MA 02115	PC	Unrestricted operating support	20,000
Catholic Schools Foundation Inc 67 Batterymarch Street, 6th Floo Boston, MA 02110	PC	To support the Inner-City Scholarship Fund for fiscal years 2018 and 2019	75,000
Celebrity Series of Boston 20 Park Plaza, Suite 1032 Boston, MA 02116-4303	PC	To support the Concert For One: 1 Musician, 1 Listener, 1 Minute of Live Music	25,000
Center For Disaster Philanthropy Inc One Thomas Circle NW Suite 700 Washington, DC 20005	PC	To support the Atlantic Hurricane Season Recovery Fund	500,000
Children's Hospital Corporation 300 Longwood Avenue Boston, MA 02115	PC	Unrestricted operating support	20,000
Childrens Investment Fund Inc 18 Tremont Street, Suite 500 Boston, MA 02108	PC	Unrestricted operating support and the loan fund for fiscal years 2019 and 2020	600,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building, 126 High Street Boston, MA 02110	PC	Unrestricted operating support, and support for local network agencies	1,620,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Commonwealth Shakespeare Company, Inc. 101 Arch Street, 8th Floor Boston, MA 02110	PC	To support Shakespeare on the Common for fiscal years 2017, 2018, and 2019	25,000
Dayton Foundation, Inc. 40 N. Main Street Suite 500 Dayton, OH 45423	PC	To support the Dayton Oregon District Tragedy Fund	25,000
Edvestors Inc 140 Clarendon Street Boston, MA 02116	PC	To support a challenge grant for the transition fund	100,000
Edvestors Inc 140 Clarendon Street Boston, MA 02116	PC	Unrestricted operating support and BPS Arts Expansion for fiscal years 2019 and 2020	700,000
English for New Bostonians 105 Chauncy St., 4th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	135,000
Franciscan Hospital for Children, Inc. 30 Warren Street Brighton, MA 02135	PC	Unrestricted operating support	20,000
Gateways Access to Jewish Education, Inc. 333 Nahanton Street Newton, MA 02459	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Health Care For All, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	50,000
Health Law Advocates, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2020 and 2021, and strategic and succession planning	81,000
Health Leads, Inc. 24 School Street, 6th Floor Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2017, 2018 and 2019	40,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Hebrew Seniorlife, Inc. 1200 Centre Street Boston, MA 02131	PC	Unrestricted operating support	20,000
Institute for National Security Studies, a Think Tank By Tel Aviv University, Ltd. 40 Haim Levanon St. PO Box 39950 Tel Aviv, Israel 6997556	PC	Unrestricted operating support for fiscal years 2019 and 2020	250,000
International Association Yahad-in Unum 30 Rue Garibaldi Saint Ouen, France 93400	PC	To support research missions for fiscal years 2019 and 2020	600,000
Jewish Arts Collaborative Inc 1320 Centre Street, Suite 201 Newton Center, MA 02459	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Jewish Community Center of Greater Boston, Inc. 333 Nahanton Street Newton Centre, MA 02459-3213	PC	To support the mission & goals (including capital goals) of JCC of Greater Boston for fiscal years 2018 - 2021	250,000
Jewish Community Relations Council 121 Steuart Street, Suite 301 San Francisco, CA 94105	PC	To support the Institute for Curriculum Services for fiscal years 2018, 2019, and 2020	100,000
Jewish Family & Children's Service 1430 Main Street Waltham, MA 02451	PC	Unrestricted operating support for fiscal years 2018 and 2019	350,000
Jewish Federation of Greater Pittsburgh 2000 Technology Drive Pittsburgh, PA 15219	PC	To support the New Zealand Islamophobic Attack Emergency Relief Fund	50,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of CANVAS for fiscal years 2019 and 2020	150,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of JFN for fiscal years 2019 and 2020	100,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Vocational Service, Inc. 75 Federal Street, 3rd Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	250,000
Jewish Women's Archive, Inc. One Harvard Street, Suite 200 Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	50,000
Judge Baker Children's Center 53 Parker Hill Avenue Boston, MA 02120	PC	Unrestricted operating support	20,000
Leading Edge Alliance Inc 85 Broad St. 16th Floor New York, NY 10004	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	100,000
Leket Israel 11 HaSadna; P.O. Box 2297 Ra'anana AEL, Israel 43650-06	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	75,000
Longwood Symphony Orchestra, Inc. 320 Washington Street Suite 200 Brighton, MA 02135	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	25,000
Massachusetts Advocates for Children, Inc. 25 Kingston St. #2F Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Masscreative Inc 15 Channel Center Street, Suite 103 Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	50,000
Merrimack Valley Food Bank, Inc. 735 Broadway Street Lowell, MA 01854	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	25,000
Missionsafe A New Beginning Inc. 18 John Eliot Square Roxbury, MA 02119	PC	To support office and program space improvements	5,600
National Consumer Law Center, Inc. 7 Winthrop Square Boston, MA 02110-1245	PC	To support Project Stay Connected for fiscal years 2020, 2021, and 2022	25,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
New Venture Fund 1201 Connecticut Ave. NW Suite 300 Washington, DC 20036	PC	To support the SafetyRespectEquity Coalition for fiscal years 2018, 2019, and 2020	50,000
Our Military Kids, Inc. 6861 Elm Street, Suite 2A McLean, VA 22101	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	50,000
Philanthropy Massachusetts, Inc. 133 Federal Street Suite 802 Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Pine Street Inn, Inc. 444 Harrison Avenue Boston, MA 02118	PC	To support the Many Roads Home campaign	1,250,000
President and Fellows of Harvard College 1033 Massachusetts Ave Ste 3 Cambridge, MA 02138	PC	To support the Chapter 115 Veterans Benefit Eligibility Tool for fiscal years 2018 and 2019	115,000
Project Bread - The Walk for Hunger, Inc. 145 Border Street East Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	35,000
Roca, Inc. 101 Park Street Chelsea, MA 02150	PC	Unrestricted operating support in Massachusetts for fiscal years 2020, 2021, and 2022	200,000
Social Finance, Inc. 10 Milk Street Suite 1010 Boston, MA 02108	PC	To support the development and implementation of Veterans CARE Pay for Success Project for fiscal years 2017 - 2020	50,000
Soldier On Inc 290 Merrill Road Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Spaulding Rehabilitation Hospital Corporation 300 First Avenue Charlestown, MA 02129	PC	Unrestricted operating support	20,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Summer Search 3840 Washington Street, Suite 2 Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	75,000
Summer Search 3840 Washington Street, Suite 2 Jamaica Plain, MA 02131	PC	Unrestricted operating support for fiscal years 2020 and 2021	75,000
Teach For America Inc 60 Canal Street 5th Floor Boston, MA 02114	PC	Unrestricted support in Massachusetts for fiscal years 2019 - 2022	100,000
The Boston Private Industry Council, Inc. 2 Oliver Street 3rd Floor Boston, MA 02109	PC	To support the School-to-Career Program for summers 2018, 2019, and 2020	50,000
The Food Bank of Western Massachusetts, Inc. P.O. Box 160 Hatfield, MA 01038	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	25,000
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	50,000
The Institute of Contemporary Art 25 Harbor Shore Drive Boston, MA 02210	PC	Unrestricted operating and capital support for fiscal years 2018 - 2021	250,000
The McLean Hospital Corporation 115 Mill Street; Mail Stop 126 Belmont, MA 02478-1064	PC	Unrestricted operating support	25,000
The Reut Institute - From Vision to Policy Hapelech 7 Tel-Aviv, Israel 6816727	PC	Unrestricted operating support for fiscal years 2018 and 2019	50,000
United Way of El Paso County 100 N. Stanton Suite 500 El Paso, TX 79901	PC	To support the El Paso Community Assistance Fund	50,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
United Way Of Massachusetts Bay Inc 51 Sleeper Street Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2020 and 2021	225,000
Veterans Inc 69 Grove Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2019 and 2020	35,000
Veterans Legal Services Inc. P.O. Box 8457 Boston, MA 02114	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	100,000
Washington Institute for Near East Policy 1111 19th Street, NW Suite 500 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2019 and 2020	125,000
Worcester County Food Bank, Inc. 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	25,000
Yad Vashem - The Martyrs' and Heroes' Remembrance Authority 4 Har Hazikaron, PO Box 3477 Jerusalem, Israel 9103401	PC	Unrestricted and capital support for fiscal years 2018, 2019, and 2020	770,000
		Subtotal Good Philanthropic Citizen and Community Grants	**11,801,600**

Healthy Democracy

American Jewish Committee 165 East 56 Street New York, NY 10022	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	100,000
Anti-Defamation League 605 Third Avenue New York, NY 10158-0180	PC	Unrestricted operating support, including in the New England Region, for fiscal years 2020 and 2021	800,000
Bagly Inc PO Box 960814 Boston, MA 02196-0814	PC	Unrestricted operating support for fiscal years 2020 and 2021	25,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Campaign Legal Center Inc 1101 14th Street, NW Suite 400 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	250,000
Catholic Charitable Bureau Of The Archdiocese Of Boston Inc 275 West Broadway 2nd Floor South Boston, MA 02127	PC	To support immigration legal services	50,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building 126 High Street Boston, MA 02110	PC	To support the mission and goals of the Jewish Community Relations Council of Greater Boston	250,000
Committee To Protect Journalists Inc 330 Seventh Avenue 11th Floor New York, NY 10001	PC	To support U.S. initiatives for fiscal years 2018 and 2019	200,000
Common Cause Education Fund 805 Fifteenth Street, NW Suite 800 Washington, DC 20005	PC	To support the Hofeller Emergency Fund	200,000
Equal Justice Initiative 122 Commerce Street Montgomery, AL 36104	PC	Unrestricted operating support and the reserve fund for fiscal years 2020 and 2021	750,000
Facing History And Ourselves Inc 16 Hurd Road Brookline, MA 02445	PC	Unrestricted operating support for fiscal years 2018, 2019 and 2020	2,000,000
German Marshall Fund Of The United States 1744 R Street NW Washington, DC 20009	PC	To support the mission and goals of the Alliance for Securing Democracy for fiscal years 2019 and 2020	400,000
GLBTQ Legal Advocates & Defenders Inc 18 Tremont St STE 950 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2020 and 2021	100,000
Hillel: The Foundation for Jewish Campus Life 800 Eighth Street, NW Washington, DC 20001-3724	PC	To support the mission and goals of the Center for Community Outreach	125,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Interfaith Youth Core 141 W. Jackson Blvd, Suite 3200 Chicago, Illinois 60604	PC	Unrestricted operating support	250,000
Issue One 1401 K Street NW Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2019 and 2020	200,000
Keshet, Inc. 284 Amory Street Boston, MA 02130	PC	Unresricted operating support for fiscal years 2018, 2019 and 2020	100,000
Lambda Legal Defense And Education Fund Inc 120 Wall Street 19th Floor New York, NY 10005-3919	PC	Unrestricted operating support for fiscal years 2020 and 2021	100,000
Massachusetts Alliance Of Portuguese Speakers Inc 1046 Cambridge Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2020 and 2021	25,000
Massachusetts Immigrant And Refugee Advocacy Coalition Inc 105 Chauncy Street 901 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2020 and 2021	125,000
Massachusetts Legal Assistance Corporation 18 Tremont Street Suite 1010 Boston, MA 02108	PC	Unrestricted operating support and immigration legal services for Massachusetts organizations for fiscal years 2020 and 2021	700,000
Massachusetts Legal Assistance Corporation 18 Tremont Street Suite 1010 Boston, MA 02108	PC	To support the Greater Boston Immigrant Defense Fund for fiscal years 2020 and 2021	125,000
NAACP Legal Defense And Educational Fund, Inc. 40 Rector Street, 5th Floor New York, NY 10006	PC	Unrestricted operating support for fiscal years 2019 and 2020	500,000
National Center For Transgender Equality 1133 19th St NW Suite 302 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2020 and 2021	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Neo Philanthropy Inc 45 West 36th St, 6th Floor New York, NY 10018	PC	To support the State Infrastructure Fund for fiscal years 2018 and 2019	250,000
New Venture Fund 1201 Connecticut Ave. NW Suite 300 Washington, DC 20036	PC	To support the 2020 Census Initiative for fiscal years 2018, 2019, and 2020	250,000
New Venture Fund 1201 Connecticut Ave. NW Suite 300 Washington, DC 20036	PC	To support the Voter Engagement Fund	5,000,000
News Literacy Project Inc 5335 Wisconsin Ave. NW Suite 440 Washington, DC 20015	PC	Unrestricted operating support for fiscal years 2018 and 2019	150,000
Philanthropy Massachusetts, Inc. 133 Federal Street Suite 802 Boston, MA 02110	PC	To support the Massachusetts Census Equity Fund 2020 for fiscal years 2018, 2019, and 2020	85,000
Policy Impact 1107 9th Street Ste 500 Sacramento, CA 95814	PC	To support the Funders Summit on Democracy and Civic Life	10,000
Policy Impact 1107 9th Street Ste 500 Sacramento, CA 95814	PC	To support nonpartisan convening spaces devoted to challenges facing American democracy	75,000
Project Citizenship Inc 4 Faneuil South Market Building 3rd Floor Boston, MA 02109	PC	Unrestricted operating support for fiscal years 2019 and 2020	30,000
Protect Democracy Project 2020 Pennsylvania Ave NW STE 163 Washington, DC 20006	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	500,000
Reporters Committee For Freedom Of The Press 1156 15th Street NW Suite 1020 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018 and 2019	150,000
The Brookings Institution 1775 Massachusetts Ave., NW Washington, DC 20036	PC	To support the mission and goals of Lawfare for fiscal years 2020 and 2021	100,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Lenny Zakim Fund Inc The LZF c/o DLA Piper 33 Arch Street 26th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2018 and 2019	125,000
The Massachusetts Institute for a New Commonwealth, Inc. 11 Beacon Street, Suite 500 Boston, MA 02108	PC	To support framing research through MassFORWARD	25,000
The Miami Foundation Inc 40 NW 3rd Street Suite 305 Miami, FL 33128	PC	To support the Press Freedom Law Clinics Fund for fiscal years 2019, 2020, and 2021	400,000
The Project On Government Oversight Inc 1100 G Street NW Suite 500 Washington, DC 20005	PC	Unrestricted operating support for fiscal years 2018, 2019, and 2020	300,000
The Shalom Hartman Institute of North America 475 Riverside Drive Suite 1450 New York, NY 10115	PC	To support the mission and goals of SHINA for fiscal years 2020 and 2021	500,000
United States Holocaust Memorial Museum 100 Raoul Wallenberg Place SW Washington, DC 20024-2126	PC	Unrestricted operating support for fiscal years 2017, 2018, and 2019	150,000
Western States Center Inc. PO Box 40305 Portland, OR 97240-0305	PC	Unrestricted operating support for fiscal years 2020 and 2021	150,000
William J Brennan Jr Center For Justice Inc 120 Broadway Suite 1750 New York, NY 10271	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	250,000
		Subtotal Healthy Democracy	**15,950,000**

Medical and Scientific Research

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Mark Andermann, PhD Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	I	Focus on the positive: pathways for biasing responses to mixed-valence food cues	250,842
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding for the Klarman Cell Observatory to systematically define cellular circuits in mammalian cells	5,000,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To provide flexible, incubative and accelerant funding	1,875,000
Broad Institute, Inc. 415 Main Street Cambridge, MA 02142	PC	To develop and support scientific collaborations between Israeli and Broad Institute scientists to address major problems in biomedicine	1,000,000
Haijiang Cai, PhD Arizona Board of Regents, University of Arizona 888 N. Euclid PO Box 210158 Tucson, AZ 85721-0158	I	Simultaneous targeting of specific neurons for anorexia nervosa in two extended amygdala regions	250,000
Roger Cone, PhD Regents of the University of Michigan 3003 South State Street Ann Arbor, MI 48109-1274	I	Development of Melanocortin-3 Receptor Agonists for the Treatment of Anorexia Nervosa	305,412
Scott Crow, MD Regents of the University of Minnesota 2450 Riverside Ave Minneapolis, MN 55454	I	Goal based learning and habit in Anorexia Nervosa	179,180
Karin Foerde, PhD Research Foundation for Mental Hygiene, Inc. 1051 Riverside Drive New York, NY 10032	I	Neural And Cognitive Mechanisms Underlying Generalization Of Food Avoidance In Anorexia Nervosa	150,000
Jeffrey Friedman, MD, PhD The Rockefeller University 1230 York Avenue, Box 305 New York, NY 10065	I	Decoding the effects linking anorexia with stress by monitoring the activity dynamics of a septal neurotensin neurons in mice	249,492

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Laura Huckins, PhD Ichan School of Medicine at Mount Sinai 1 Gustave L. Levy Place New York, NY 10029-5674	I	Translation of Anorexia Nervosa variants into genes, pathways, and tissues	185,034
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street Jerusalem, Israel 9104001	PC	To develop and support scientific collaborations between Israeli and Broad Institute scientists to address major problems in biomedicine	1,000,000
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street Jerusalem, Israel 9104001	PC	To support research grants within the framework of the Israel Precision Medicine Partnership	953,279
Israel Science Foundation Albert Einstein Square 43 Jabotinsky Street Jerusalem, Israel 9104001	PC	To support operational expenses related to the Israel Precision Medicine Partnership	141,369
Kellie Tamashiro, PhD; Angela Guarda, MD Johns Hopkins University 733 N. Broadway St. Suite 117 Baltimore, MD 21205	I	Neural Mechanisms of Appetite Dysregulation in Anorexia Nervosa: The Role of AGRP	190,325
Joanna Steinglass, MD Research Foundation for Mental Hygiene, Inc. 1051 Riverside Drive New York, NY 10032	I	Approach Or Avoidance When Food is the Outcome: A New Mechanistic Model of Anorexia Nervosa	249,995
The Board of Trustees of the Leland Stanford Junior University 450 Serra Mall Stanford, CA 94305-2004	PC	To support Stanford Technology Analytics and Genomics in Sleep (STAGES)	2,472,196
Trustees Of Columbia University In The City Of New York 615 West 131st Street 6th Floor, Mail Code 8725 New York, NY 10027	PC	To support and publish the results of a Delphi panel to define the stages of Anorexia Nervosa illness and recovery	29,090

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Lori Zeltser, PhD Trustees Of Columbia University In The City Of New York 615 West 131st Street 6th Floor, Mail Code 8725 New York, NY 10027	I	Stress and Eating Behavior in Anorexia Nervosa	250,000
		Subtotal Medical and Scientific Research	**14,731,214**
Funder Collaborations and Bold Bets			
A Far Cry Inc 146A South Street Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
Barrington Stage Co Inc 122 North Street Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	102,437
Boston Chinatown Neighborhood Center Inc 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	42,187
Boston Modern Orchestra Project Inc 376 Washington St Malden, MA 02148	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
Brigham & Women's Hospital 75 Francis Street Boston, MA 02115	PC	To support Ariadne Labs: A Joint Center for Health Systems Innovation for fiscal years 2020 and 2021	1,000,000
Cape Ann Museum Inc 27 Pleasant Street Gloucester, MA 01930	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	70,312
Community Access To The Arts Inc 40 Railroad St., Suite #6 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Community Art Center, Inc. 119 Windsor Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Community Music School Of Springfield Inc 127 State Street Springfield, MA 01103	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	74,312
Company One Inc 539 Tremont Street, Studio 202 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	42,187
Design Museum Foundation Inc 100 Summer Street Suite 1925 Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	42,187
Double Edge Theatre Productions Incorporated 948 Conway Road Ashfield, MA 01330	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Eliot School Trustees 24 Eliot Street, PO Box 300351 Boston, MA 02130	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	56,250
Featherstone Center For The Arts Inc PO Box 1145 Oak Bluffs, MA 02557	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	46,187
Fitchburg Art Museum 185 Elm Street Fitchburg, MA 01420	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Home Funders Collaborative LLC 75 Arlington St Boston, MA 02116	NC	To support legal and other costs incurred in documenting and implementing a services agreement with The Boston Foundation	19,075
Mahaiwe Performing Arts Center Inc PO Box 690 Great Barrington, MA 01230	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	88,375
Merrimack Repertory Theatre 132 Warren Street Lowell, MA 01852	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
New Bedford Museum And Art Center Inc 608 Pleasant Street New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	32,125

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
New Bedford Symphony Orchestra Association Inc 128 Union Street, Suite 204 New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
New Dance Complex Inc 536 Massachusetts Avenue Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	42,187
Norman Rockwell Museum At Stockbridge Inc 9 Glendale Road / Rte 183 Stockbridge, MA 01262	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	116,500
Now And There Inc 108 Lincoln Street, No. 6A Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	42,187
Payomet Performing Arts Charitable Trust 29 Old Dewline Rd. Truro, MA 02666	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	60,250
Provincetown Art Association And Museum Inc 460 Commercial Street Provincetown, MA 02657	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	74,312
Raw Art Works, Inc. 37 Central Square Lynn, MA 01901	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	84,375
Record Company Inc 960 Massachusetts Ave Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	28,125
Speak Easy Stage Inc 539 Tremont Street Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	70,312
Strategic Grant Partners, Inc. 177 Huntington Avenue Suite 1500 Boston, MA 02115	PF	To provide nonprofits with funding and technical assistance to improve the lives of individuals & families in Massachusetts	672,112

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Technical Development Corporation 31 Milk Street, Suite 310 Boston, MA 02109	PC	To support the management, technical assistance, and training for the Barr-Klarman Massachusetts Arts Initiative for fiscal years 2018, 2019, and 2020	323,000
The Northampton Academy Of Music Inc 274 Main Street Northampton, MA 01060	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	32,125
Upstream Usa Inc 426 17th Street Suite 200 Oakland, CA 94612	PC	To support the expansion to Massachusetts for fiscal years 2018 - 2022	1,000,000
Worcester Art Museum 55 Salisbury Street Worcester, MA 01609	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	112,500
Year Up, Inc. 45 Milk St Fl 9 Boston, MA 02109	PC	Unrestricted operating support, including Boston operations, for fiscal years 2017 - 2024	1,250,000
Zeiterion Theatre Inc 684 Purchase St New Bedford, MA 02740	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021, as a part of the Barr-Klarman Massachusetts Arts Initiative	88,375
		Subtotal Funder Collaborations and Bold Bets	**6,106,119**
Children's Mental Health			
Adolescent Consultation Services, Inc. 189 Cambridge Street Cambridge, MA 02141	PC	Unrestricted operating support for fiscal years 2020 and 2021	40,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 02118	PC	To support program management, clinical training, and evaluation for the TEAM UP for Children Initiative	575,000
Brockton Neighborhood Health Center Inc. 63 Main Street Brockton, MA 02301	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	202,500

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Brookline Community Mental Health Center, Inc. 41 Garrison Road Brookline, MA 02445	PC	To support the Bridge for Resilient Youth in Transition (BRYT) program for fiscal years 2018, 2019, and 2020	125,000
Codman Square Health Center Inc. 637 Washington Street Dorchestser, MA 02124	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	205,000
Crisis Text Line 24 W 25th St, Fl 6 New York, NY 10010	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	500,000
DotHouse Health Inc. 1353 Dorchester Avenue Dorchester, MA 02122	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	160,000
Greater New Bedford Community Health Center Inc. 874 Purchase Street New Bedford, MA 02740	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	165,000
Lowell Community Health Center Inc. 161 Jackson Street Lowell, MA 01852	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	147,500
Massachusetts Society for the Prevention of Cruelty to Children 3815 Washington Street Suite 2 Boston, MA 02130	PC	To support the Children's Mental Health Campaign for fiscal years 2020 and 2021	50,000
Parent Professional Advocacy League, Inc. 15 Court Square Suite 660 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2020 and 2021	30,000
South Boston Community Health Center 409 West Broadway South Boston, MA 02127	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	112,500
The Dimock Center 55 Dimock Street Roxbury, MA 02119	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	157,500

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The McLean Hospital Corporation 115 Mill Street; Mail Stop 126 Belmont, MA 02478-1064	PC	To support the McLean Hospital Admissions Building Expansion and Renovation project (Capital)	1,000,000
The UMass Memorial Foundation, Inc. 333 South St Shrewsbury, MA 01545	PC	To support the Sibling Support Program: A Family-Centered Mental Health Initiative for fiscal years 2019 and 2020	25,000
Youth Villages, Inc. 3320 Brother Blvd Memphis, TN 38133	PC	Unrestricted operating support in New England for fiscal years 2020 and 2021	550,000
		Subtotal Children's Mental Health	**4,045,000**
Arab Israeli Employment and Education			
AJEEC-NISPED 33 Smilanski Street Beer Sheva, Israel 8421360	PC	To support the Mudabra and Atudot programs for fiscal years 2019 and 2020	50,000
Amutat Hamovilim Lemada and Technology (RA) P.O. Box 114 Baqa Al-Gharbiyye, Israel 30100	PC	To support Alrowad's Junior High Arab Excellence Program	175,000
Hasoub - Organization for Entrepreneurship and Technology Promotion within the Arab Society Kfar Kara, Israel 3007500	PC	Unrestricted operating support for fiscal years 2019 and 2020; and a challenge grant to support building renovations for the Hasoub Garage	50,000
ITWorks Empowering People (A"R) 7 Giborei Israel Entrance B 3rd floor, Poleg new Industrial zone Netanya, Israel 4250405	PC	To support efforts to strengthen Arab employment for fiscal years 2019 and 2020	50,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the Arab Israeli Funders Initiative	175,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the Social Venture Fund for Jewish-Arab Equality and Shared Society for fiscal years 2020, 2021, and 2022	50,000
Kav Mashve - Employers Coalition for the Enhancement of Equality of Employment for Academic Arabs and other Minorities 39 Ha'atzmaut Road Haifa, Israel 3303320	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Matan - Investing in the Community 33 Ya'avets St. Tel Aviv, Israel 6525832	PC	To support Co-Impact - The Partnership for a Breakthrough in Arab Employment for fiscal years 2018, 2019, and 2020	750,000
Rothschild Caesarea Partnerships Fellowship 7 Ha'eshel St. Southern Industrial Park Caesarea, Israel 30795	PC	To support the Cadets for Local Government program for fiscal years 2018, 2019, and 2020	275,000
Seal-Maoz Hamelacha 4 Lod, Israel 7182008	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
Sikkuy: The Association for the Advancement of Civic Equality 17 Rachel Hameshoreret Jerusalem, Israel 96348	PC	To support the project to maximize implementation of Resolution 922	125,000
Tapuah - The Association to Advance the Era of Technology in Israel Tchernikhovski St 3 Ramle, Israel 7244402	PC	To support the mission and goals of Tapuah, including its work in the Arab community, for fiscal years 2019 and 2020	75,000
Technion - Israel Institute of Technology Technion City Haifa, Israel 3200004	PC	To support the undergraduate student village at Technion's Haifa campus for fiscal years 2015, 2016 and 2017 (Capital)	750,000
The Abraham Fund Initiatives 5 HaMelacha Lod, Israel 7152011	PC	To support the Safe Communities project for fiscal years 2019 and 2020	100,000
The Association for Change in Education - Established by the Rashi Foundation Kfar Hanoar Ben Shemen Ben Shemen, Israel 7311200	PC	To support the Living Together Initiative	100,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Davidson Institute of Science Education, at the Weizmann Institute of Science (R.A.) 234 Herzl St. PO Box 26 Rehovot, Israel 7610001	PC	To support the Davidson Institute Ma'ala Program in Sciences for Arab Students for fiscal years 2018, 2019, and 2020	200,000
Tsofen High Technology Centers, LTD PO Box 50696 Nazareth, Israel 16164	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
		Subtotal Arab Israeli Employment and Education	**4,075,000**
Connections to Israel			
A Wider Bridge 25 Broadway Suite 1700 New York, NY 10004	PC	To support leadership educational missions to Israel for fiscal years 2018 and 2019	75,000
Gann Academy The New Jewish High School of Greater Boston Inc 333 Forest Street Waltham, MA 02452	PC	To support the myIsrael program for fiscal years 2019 and 2020	125,000
Honeymoon Israel Foundation Inc 6070 Whitegate Crossing East Amherst, NY 14051	PC	Unrestricted operating support for fiscal years 2020 and 2021	400,000
Israel-America Academic Exchange 8383 Wilshire Boulevard, Suite 400 Beverly Hills, CA 90211	PC	Unrestricted operating support for fiscal year 2018 and 2019	150,000
Itrek Inc. 1460 Broadway New York, NY 10036	PC	Unrestricted operating support for fiscal years 2019 and 2020	1,000,000
Vibe Israel (R.A.) Be All 94 Yigal Alon Street Tel Aviv, Israel 6789155	PC	Unrestricted operating support for fiscal years 2019 and 2020	100,000
		Subtotal Connections to Israel	**1,850,000**

Music Pathways for Youth

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Berklee College of Music, Inc. 1140 Boylston Street, MS-1140 IA Boston, MA 02215	PC	To support City Music Boston for fiscal years 2020 and 2021	125,000
Boston Arts Academy Foundation, Inc. 45 Temple Place Floor 4 Boston, MA 02111	PC	Unrestricted operating and capital support, and a challenge grant to strengthen individual development efforts for fiscal years 2020 and 2021	250,000
Boston Children's Chorus, Inc. 20 Old Colony Avenue Boston, Massachusetts 02127	PC	Unrestricted operating support for fiscal years 2019 and 2020	90,000
Boston City Singers, Inc. 17 Waldeck Street Dorchester, MA 02124	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	75,000
Boston Renaissance Foundation, Inc. 1415 Hyde Park Ave Hyde Park, MA 02136	PC	To purchase 15 violins and accessories for the music program	3,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Ave Boston, MA 02215	PC	To support the Intensive Community Program for fiscal years 2019, 2020, and 2021	125,000
Boston Youth Symphony Orchestras, Inc. 855 Commonwealth Ave Boston, MA 02215	PC	To purchase woodwind, brass, and percussion instruments for the Intensive Community Program expansion	20,000
Bridge Boston Foundation Inc 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2021, 2022, and 2023	50,000
Bridge Boston Foundation Inc 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2019 and 2020	50,000
Brooke School Foundation 190 Cummins Highway Boston, MA 02131	PC	To purchase guitars, percussion instruments, and accessories for the music program at Brooke High School	10,000
Codman Academy Foundation 637 Washington Street Dorchester, MA 02124	PC	To rent violins and cellos and to purchase music stands	5,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Commonwealth of Massachusetts Cultural Council 10 St. James Avenue, 3rd Floor Boston, MA 02116-3803	PC	To manage the Music Educator/Teaching Artist Fellowship Program for fiscal years 2019 and 2020	135,000
Community Music Center of Boston 34 Warren Avenue Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	125,000
Community Music School Of Springfield Inc 127 State Street Springfield, MA 01103	PC	To purchase instruments and accessories for the Sonido Musica program	40,000
Community Music School Of Springfield Inc 127 State Street Springfield, MA 01103	PC	To support the Sonido Musica program and student music lessons for fiscal years 2020 and 2021	40,000
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	A challenge grant to support the Almost Home Campaign	500,000
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	To support the El Sistema music program for fiscal years 2020, 2021, and 2022	50,000
Fall River Public Schools 417 Rock Street Fall River, MA 02720	PC	To purchase 25 violins, 10 cellos, and accessories for the Department of Fine and Performing Arts	17,000
Friends Of Boston Latin Academy Inc 205 Townsend St. Boston, MA 02121	PC	To purchase violins, violas, cellos, basses, and for string repairs and accessories for Boston Latin Academy's orchestra program	20,000
Friends of Veritas Preparatory Charter School Inc 370 Pine St. Springfield, MA 01105	PC	To purchase 8 violins, 6 electric keyboards, 16 drums and accessories for the music program	10,000
From the Top, Inc. 140 Clarendon Street, Suite 301 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019 and 2020	150,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Handel and Haydn Society 9 Harcourt St. Boston, MA 02116	PC	To support the Education Program for fiscal years 2019 and 2020	40,000
Hyde Square Task Force, Inc. 30 Sunnyside Street Jamaica Plain, MA 02130	PC	To support real estate planning	43,000
Hyde Square Task Force, Inc. 30 Sunnyside Street Jamaica Plain, MA 02131	PC	Unrestricted operating support and the music program for fiscal years 2018 and 2019	100,000
Josiah Quincy Orchestra Program Limited 885 Washington Street Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019 and 2020	35,000
Joy Of Music Program Inc. 1 Gorham Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2020 and 2021	20,000
Margarita Muniz Academy Foundation Inc 20 Child Street Jamaica Plain, MA 02130	PC	To support the El Sistema Program for fiscal years 2020 and 2021	20,000
Music And Youth Initiative Inc 398 Columbus Ave PMB #307 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2018 and 2019	25,000
Musica Franklin P.O. Box 963 Greenfield, MA 01302	PC	To rent 24 violins and 5 cellos, and to purchase percussion instruments and 2 storage cabinets	10,000
Musiconnects Inc 20 Belgrade Ave. Ste. 1 Roslindale, MA 02131	PC	Unrestricted operating support for fiscal years 2019 and 2020	25,000
Pakachoag Music School Of Greater Worcester 10 Irving Street Worcester, MA 01609	PC	Unrestricted operating support for fiscal years 2020 and 2021	15,000
Perkins School for the Blind 175 North Beacon Street Watertown, MA 02472	PC	To support the Secondary Music Program for fiscal years 2018, 2019, and 2020	40,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Project STEP, Inc. Symphony Hall 301 Massachusetts Avenue, Symphony Hall Boston, MA 02115	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	40,000
Saint John Paul II Catholic Academy Inc 2200 Dorchester Ave. Dorchester, MA 02124	PC	To support music programming for fiscal years 2018 and 2019	40,000
Sociedad Latina, Inc. 1530 Tremont Street Roxbury, MA 02120	PC	To support the music program and facility renovation for the Center for Latino Youth Leadership for fiscal years 2019, 2020, and 2021	350,000
Springfield Public Schools 1550 Main Street PO Box 1410 Springfield, MA 01103-1410	PC	To purchase instruments for the Springfield High School Science and Technology Band	15,000
The Boston Education Development Foundation, Inc. 7 Palmer Street 2nd Floor Roxbury, MA 02119	PC	To purchase guitars, basses, keyboards, and drums, and for instrument repairs	10,000
The Boston Education Development Foundation, Inc. 7 Palmer Street 2nd Floor Roxbury, MA 02119	PC	To support the Boston Public Schools Visual and Performing Arts Department's Citywide Marching Band for summer 2019	10,000
The Boston Education Development Foundation, Inc. 7 Palmer Street 2nd Floor Roxbury, MA 02119	PC	To support the Making Music Matters program for fiscal years 2019 and 2020	75,000
West End House, Inc. 105 Allston St Allston, MA 02134	PC	To support the music program and the reserve fund for fiscal years 2019, 2020, and 2021	300,000
Worcester Chamber Music Society Inc 323 Main Street Worcester, MA 01608	PC	To rent 20 violins and purchase 10 music stands	4,000
Worcester Chamber Music Society Inc 323 Main Street Worcester, MA 01608	PC	To support the Neighborhood Strings program for fiscal years 2020 and 2021	20,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
ZUMIX, Inc. 260 Sumner St Boston, MA 02472	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	75,000
		Subtotal Music Pathways for Youth	**3,202,000**
Other Grants and Contributions			
Bend The Arc: A Jewish Partnership For Justice 330 Seventh Avenue Suite 1900 New York, NY 10001	PC	Other community contributions - employee matching gift	1,500
Beth Israel Deaconess Medical Center, Inc. 330 Brookline Avenue Boston, MA 02215	PC	To support the NICU Expansion Project (Capital)	2,000,000
Boston Center for the Arts, Inc. 539 Tremont Street Boston, MA 02116	PC	Other community contributions - employee matching gift	4,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 02118	PC	To support the Building the New BMC Campaign (Capital)	2,000,000
Brandeis University P.O. Box 549110 Attn: Office of Development Waltham, MA 02454-9110	PC	To support the 2019 Spring Conference at the Schusterman Center for Israel Studies	5,000
Brandeis University P.O. Box 549110 Attn: Office of Development Waltham, MA 02454-9110	PC	Other community contributions - employee matching gift	750
Brookline Community Foundation, Inc. 40 Webster Place Brookline, MA 02445	PC	Other community contributions - employee matching gift	257
Chocorua Lake Conservancy PO Box 105 Chocorua, NH 03817	PC	Other community contributions - employee matching gift	1,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building 126 High Street Boston, MA 02110	PC	Other community contributions - employee matching gift	180
Earthjustice, Inc 50 California St. Suite 500 San Francisco, CA 94111	PC	Other community contributions - employee matching gift	25
Fenway Community Health Center Inc 1340 Boylston Street Boston, MA 02215	PC	Other community contributions - employee matching gift	300
Footsteps Inc 114 John Street, #930 New York, NY 10272	PC	Other community contributions - employee matching gift	200
Gay & Lesbian Victory Institute Inc 1133 15th Street NW, Suite 350 Washington, DC 20005	PC	Other community contributions - employee matching gift	25
Grantmakers for Effective Organizations 1310 L Street NW Suite 650 Washington, DC 20005	PC	To support the 2020 National Conference in Boston	50,000
Heath School P.T.O. 100 Eliot Street Chestnut Hill, MA 02467	PC	Other community contributions - employee matching gift	100
Innercity Weightlifting Inc. PO Box 171313 Boston, MA 02117	PC	Other community contributions - employee matching gift	26
Jewish Federation of Greater Pittsburgh 2000 Technology Drive Pittsburgh, PA 15219	PC	Other community contributions - employee matching gift	36
Lesbian and Gay Community Services Center, Inc. 208 W 13 Street New York, NY 10011	PC	Other community contributions - employee matching gift	52

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Make-A-Wish Foundation Of Massachusetts And Rhode Island Inc. 133 Federal Street 2nd Floor Boston, MA 02110	PC	Other community contributions - employee matching gift	35
Massachusetts General Hospital 125 Nashua Street Suite 540 Boston, MA 02114	PC	To support Home Base's move to Constitution Wharf	500,000
Record Company Inc 960 Massachusetts Ave Boston, MA 02118	PC	To support facility expansion and renovation for fiscal years 2020 and 2021	175,000
Shatterproof A Nonprofit Corp 135 West 41st Street, 6th Floor New York, NY 10036	PC	Other community contributions - employee matching gift	500
Silver Lining Mentoring, Inc. 727 Atlantic Avenue 3rd floor Boston, MA 02111	PC	Other community contributions - employee matching gift	25
Slingshot Fund Inc 25 Broadway, 9th Floor New York, NY 10004	PC	Other community contributions - employee matching gift	500
Social Innovation Forum Inc. 2 Oliver Street Suite 802 Boston, MA 02109	PC	Other community contributions - employee matching gift	100
Solomon Schechter Day School of Greater Boston 125 Wells Avenue Newton, MA 02459	PC	Other community contributions - employee matching gift	200
Third Sector New England, Inc. 89 South Street, Suite 700 Boston, MA 02111	PC	Other community contributions - employee matching gift	50
Trustees of Boston University 25 Buick Street Boston, MA 02215	PC	Other community contributions - employee matching gift	50

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
UNICEF USA 125 Maiden Lane New York, NY 10038	PC	Other community contributions - employee matching gift	3,000
UpStart Bay Area 1111 Broadway 3rd floor Oakland, CA 94607	PC	Other community contributions - employee matching gift	1,500
Veterans Legal Services Inc. P.O. Box 8457 Boston, MA 02114	PC	Other community contributions - employee matching gift	50
		Subtotal Other Grants and Contributions	**4,744,460**
Total Part XV, Line 3a - Grants Paid During the Year			**$ 66,505,393**

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Good Philanthropic Citizen and Community Grants			
Action for Boston Community Development, Inc. 178 Tremont Street 10th Floor Boston, MA 02111	PC	To support the Fuel Assistance Program for fiscal years 2020, 2021, and 2022	$ 50,000
Boston After School & Beyond, Inc. 89 South Street Boston, MA 02111	PC	Unrestricted operating support and the Summer Learning Project for fiscal years 2020 and 2021	100,000
Boston Foundation, Inc. 75 Arlington Street 3rd Floor Boston, MA 02116	PC	To support the Civic Leadership Fund for fiscal years 2020, 2021, and 2022	100,000
Boston Landmarks Orchestra Inc 545 Concord Avenue Suite 318 Cambridge, MA 02138	PC	Unrestricted operating support	50,000
Combined Jewish Philanthropies of Greater Boston, Inc. Kraft Family Building, 126 High Street Boston, MA 02110	PC	Unrestricted operating support	3,000,000
English for New Bostonians 105 Chauncy St., 4th floor Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	270,000
Health Care For All, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	100,000
Health Law Advocates, Inc. One Federal Street, 5th Floor Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2020 and 2021	60,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of CANVAS for fiscal years 2019 and 2020	150,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the mission and goals of JFN for fiscal years 2019 and 2020	100,000
Leket Israel 11 HaSadna; P.O. Box 2297 Ra'anana, Israel 43650-06	PC	Unrestricted operating support for fiscal years 2019, 2020, and 2021	100,000
Massachusetts Advocates for Children, Inc. 25 Kingston St. #2F Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2019 and 2020	25,000
Merrimack Valley Food Bank, Inc. 735 Broadway Street Lowell, MA 01854	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	50,000
National Consumer Law Center, Inc. 7 Winthrop Square Boston, MA 02110-1245	PC	To support Project Stay Connected for fiscal years 2020, 2021, and 2022	50,000
Philanthropy Massachusetts, Inc. 133 Federal Street Suite 802 Boston, MA 02110	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Project Bread - The Walk for Hunger, Inc. 145 Border Street East Boston, MA 02128	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	70,000
Roca, Inc. 101 Park Street Chelsea, MA 02150	PC	Unrestricted operating support in Massachusetts for fiscal years 2020, 2021, and 2022	400,000
Soldier On Inc 290 Merrill Road Pittsfield, MA 01201	PC	Unrestricted operating support for fiscal years 2019 and 2020	50,000
Summer Search 3840 Washington Street, Suite 2 Jamaica Plain, MA 02130	PC	Unrestricted operating support for fiscal years 2020 and 2021	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Food Bank of Western Massachusetts, Inc. P.O. Box 160 Hatfield, MA 01038	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	50,000
The Greater Boston Food Bank, Inc. 70 South Bay Avenue Boston, MA 02118	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	100,000
United Way Of Massachusetts Bay Inc 51 Sleeper Street Boston, MA 02210	PC	Unrestricted operating support for fiscal years 2020 and 2021	225,000
Washington Institute for Near East Policy 1111 19th Street, NW Suite 500 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2019 and 2020	125,000
Worcester County Food Bank, Inc. 474 Boston Turnpike Shrewsbury, MA 01545	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	50,000
		Subtotal Good Philanthropic Citizen and Community Grants	**5,400,000**
Healthy Democracy			
American Jewish Committee 165 East 56 Street New York, NY 10022	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	200,000
Anti-Defamation League 605 Third Avenue New York, NY 10158-0180	PC	Unrestricted operating support, including in the New England Region, for fiscal years 2020 and 2021	800,000
Bagly Inc PO Box 960814 Boston, MA 02196-0814	PC	Unrestricted operating support for fiscal years 2020 and 2021	25,000
Equal Justice Initiative 122 Commerce Street Montgomery, AL 36104	PC	Unrestricted operating support and the reserve fund for fiscal years 2020 and 2021	750,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
GLBTQ Legal Advocates & Defenders Inc 18 Tremont St STE 950 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2020 and 2021	100,000
Lambda Legal Defense And Education Fund Inc 120 Wall Street 19th Floor New York, NY 10005-3919	PC	Unrestricted operating support for fiscal years 2020 and 2021	100,000
Massachusetts Alliance Of Portuguese Speakers Inc 1046 Cambridge Street Cambridge, MA 02139	PC	Unrestricted operating support for fiscal years 2020 and 2021	25,000
Massachusetts Immigrant And Refugee Advocacy Coalition Inc 105 Chauncy Street 901 Boston, MA 02111	PC	Unrestricted operating support for fiscal years 2020 and 2021	125,000
Massachusetts Legal Assistance Corporation 18 Tremont Street Suite 1010 Boston, MA 02108	PC	Unrestricted operating support and immigration legal services for Massachusetts organizations for fiscal years 2020 and 2021	700,000
Massachusetts Legal Assistance Corporation 18 Tremont Street Suite 1010 Boston, MA 02108	PC	To support the Greater Boston Immigrant Defense Fund for fiscal years 2020 and 2021	125,000
National Center for Transgender Equality 1133 19th St NW Suite 302 Washington, DC 20036	PC	Unrestricted operating support for fiscal years 2020 and 2021	75,000
New Venture Fund 1201 Connecticut Ave. NW Suite 300 Washington, DC 20036	PC	To support the Voter Engagement Fund	5,000,000
Policy Impact 1107 9th Street Sacramento, CA 95814	PC	To support nonpartisan convening spaces devoted to challenges facing American democracy	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Regents of the University of California Los Angeles 10889 Wilshire Boulevard, Suite 700 Los Angeles, CA 90095-1406	PC	To support the Nationscape public opinion project	250,000
The Brookings Institution 1775 Massachusetts Ave., NW Washington, D.C. 20036	PC	To support the mission and goals of Lawfare for fiscal years 2020 and 2021	100,000
The Miami Foundation 40 NW 3rd Street Suite 305 Miami, FL 33128	PC	To support the Press Freedom Law Clinics Fund for fiscal years 2019, 2020, and 2021	800,000
The Shalom Hartman Institute of North America 475 Riverside Drive Suite 1450 New York, NY 10115	PC	To support the mission and goals of SHINA for fiscal years 2020 and 2021	500,000
Western States Center Inc. PO Box 40305 Portland, OR 97240-0305	PC	Unrestricted operating support for fiscal years 2020 and 2021	150,000
		Subtotal Healthy Democracy	**9,900,000**
Medical and Scientific Research			
Haijiang Cai, PhD Arizona Board of Regents, University of Arizona 888 N. Euclid PO Box 210158 Tucson, AZ 85721-0158	I	Simultaneous targeting of specific neurons for anorexia nervosa in two extended amygdala regions	500,000
Roger Cone, PhD Regents of the University of Michigan 3003 South State Street Ann Arbor, MI 48109-1274	I	Development of Melanocortin-3 Receptor Agonists for the Treatment of Anorexia Nervosa	420,129
Jeffrey Friedman, MD, PhD The Rockefeller University 1230 York Avenue, Box 305 New York, NY 10065	I	Decoding the effects linking anorexia with stress by monitoring the activity dynamics of a septal neurotensin neurons in mice	424,283

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Laura Huckins, PhD Ichan School of Medicine at Mount Sinai 1 Gustave L. Levy Place New York, NY 10029-5674	I	Translation of Anorexia Nervosa variants into genes, pathways, and tissues	461,277
Samuel Neaman Institute for National Policy Research Neaman Building Technion City, Israel 3200003	PC	To support an evaluation of the Israel Precision Medicine Partnership	300,000
Joanna Steinglass, MD Research Foundation for Mental Hygiene, Inc. 1051 Riverside Drive New York, NY 10032	I	Approach Or Avoidance When Food is the Outcome: A New Mechanistic Model of Anorexia Nervosa	499,988
		Subtotal Medical and Scientific Research	**2,605,677**
Funder Collaborations and Bold Bets			
Brigham & Women's Hospital 75 Francis Street Boston, MA 02115	PC	To support Ariadne Labs: A Joint Center for Health Systems Innovation for fiscal years 2020 and 2021	1,000,000
		Subtotal Funder Collaborations and Bold Bets	**1,000,000**
Children's Mental Health			
Adolescent Consultation Services, Inc. 189 Cambridge Street Cambridge, MA 02141	PC	Unrestricted operating support for fiscal years 2020 and 2021	40,000
Boston Medical Center Corporation One Boston Medical Center Place Boston, MA 02118	PC	To support program management, clinical training, and evaluation for the TEAM UP for Children Initiative	3,260,000
Brockton Neighborhood Health Center Inc. 63 Main Street Brockton, MA 02301	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	712,500

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Codman Square Health Center Inc. 637 Washington Street Dorchestser, MA 02124	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	22,500
Crisis Text Line 24 W 25th St, Fl New York, NY 10010	PC	Unrestricted operating support for fiscal years 2020, 2021, and 2022	1,000,000
DotHouse Health Inc. 1353 Dorchester Avenue Dorchester, MA 02122	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	555,000
Greater New Bedford Community Health Center Inc. 874 Purchase Street New Bedford, MA 02740	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	585,000
Health Care For All One Federal Street, 5th Floor Boston, MA 02110	PC	To support the Expanding Successful Pediatric Behavioral Health Programs campaign for fiscal years 2020 and 2021	100,000
Lowell Community Health Center Inc. 161 Jackson Street Lowell, MA 01852	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	22,500
Massachusetts Society for the Prevention of Cruelty to Children 3815 Washington Street Suite 2 Boston, MA 02130	PC	To support the Children's Mental Health Campaign for fiscal years 2020 and 2021	50,000
Parent Professional Advocacy League, Inc. 15 Court Square Suite 660 Boston, MA 02108	PC	Unrestricted operating support for fiscal years 2020 and 2021	30,000
South Boston Community Health Center 409 West Broadway South Boston, MA 02127	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	430,000
The Dimock Center 55 Dimock Street Roxbury, MA 02119	PC	Unrestricted operating support, as part of the TEAM UP for Children Initiative	22,500

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Youth Villages, Inc 3320 Brother Blvd Memphis, TN 38133	PC	Unrestricted operating support in New England for fiscal years 2020 and 2021	500,000
		Subtotal Children's Mental Health	**7,330,000**
Arab Israeli Employment and Education			
AJEEC-NISPED 33 Smilanski Street Beer Sheva, Israel 8421360	PC	To support the Mudabra and Atudot programs for fiscal years 2019 and 2020	50,000
Hasoub - Organization for Entrepreneurship and Technology Promotion within the Arab Society Kfar Kara, Israel 3007500	PC	Unrestricted operating support for fiscal years 2019 and 2020; and a challenge grant to support building renovations for the Hasoub Garage	150,000
ITWorks Empowering People (A"R) 7 Giborei Israel Entrance B 3rd floor, Poleg new Industrial zone Netanya, Israel 4250405	PC	To support efforts to strengthen Arab employment for fiscal years 2019 and 2020	50,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10001	PC	To support the Arab Israeli Funders Initiative for fiscal years 2020 and 2021	50,000
Jewish Funders Network 150 W. 30th Street, Suite 900 New York, NY 10002	PC	To support the Social Venture Fund for Jewish-Arab Equality and Shared Society for fiscal year 2020, 2021, and 2022	100,000
Kav Mashve - Employers Coalition for the Enhancement of Equality of Employment for Academic Arabs and other Minorities 39 Ha'atzmaut Road Haifa, Israel 3303320	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
Tapuah - The Association to Advance the Era of Technology in Israel Tchernikhovski St 3 Ramle, Israel 7244402	PC	To support the mission and goals of Tapuah, including its work in the Arab community, for fiscal years 2019 and 2020	75,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
The Center for Educational Technology 16 Klausner St. Tel Aviv, Israel	PC	To support the development of Hebrew language resources for Arab students	35,000
Tsofen High Technology Centers, LTD PO Box 50696 Nazareth, Israel 16164	PC	Unrestricted operating support for fiscal years 2019 and 2020	75,000
		Subtotal Arab Israeli Employment and Education	**660,000**
Connections to Israel			
Honeymoon Israel Foundation, Inc. 6070 Whitegate Crossing East Amherst, NY 14051	PC	Unrestricted operating support for fiscal years 2020 and 2021	400,000
Vibe Israel (R.A.) 3 Ha'arad Street Tel Aviv, Israel 6971056	PC	Unrestricted operating support for fiscal years 2019 and 2020	100,000
		Subtotal Connections to Israel	**500,000**
Music Pathways for Youth			
Berklee College of Music, Inc 1140 Boylston Street, MS-1140 IA Boston, MA 02215	PC	To support City Music Boston for fiscal years 2020 and 2021	100,000
Boston Arts Academy Foundation, Inc. 45 Temple Place Floor 4 Boston, MA 02111	PC	Unrestricted operating and capital support, and a challenge grant to strengthen individual development efforts for fiscal years 2020 and 2021	750,000
Bridge Boston Foundation, Inc. 435 Warren Street Roxbury, MA 02119	PC	To support the El Sistema program for fiscal years 2021, 2022, and 2023	100,000
Community Music School Of Springfield Inc 127 State Street Springfield, MA 01103	PC	To support the Sonido Musica program and student music lessons for fiscal years 2020 and 2021	40,000

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Conservatory Lab Charter School Foundation 2120 Dorchester Avenue Dorchester, MA 02124	PC	To support the El Sistema music program for fiscal years 2020, 2021, and 2022	100,000
From the Top, Inc. 140 Clarendon Street, Suite 301 Boston, MA 02116	PC	Unrestricted operating support for fiscal years 2019 and 2020	125,000
Joy Of Music Program Inc. 1 Gorham Street Worcester, MA 01605	PC	Unrestricted operating support for fiscal years 2020 and 2021	20,000
Margarita Muniz Academy Foundation Inc 20 Child Street Jamaica Plain, MA 02130	PC	To support the El Sistema Program for fiscal years 2020 and 2021	20,000
Pakachoag Music School of Greater Worcester 10 Irving Street Worcester, MA 01609	PC	Unrestricted operating support for fiscal years 2020 and 2021	15,000
Sociedad Latina, Inc. 1530 Tremont Street Roxbury, MA 02120	PC	To support the music program and facility renovation for the Center for Latino Youth Leadership for fiscal years 2019, 2020, and 2021	400,000
West End House, Inc. 105 Allston St Allston, MA 02134	PC	To support the music program and the reserve fund for fiscal years 2019, 2020, and 2021	100,000
Worcester Chamber Music Society Inc 323 Main Street Worcester, MA 01608	PC	To support the Neighborhood Strings program for fiscal years 2020 and 2021	20,000
		Subtotal Music Pathways for Youth	**1,790,000**

Organization name and address	Fd Status	Purpose of grant or contribution	Amount
Other Grants and Contributions			
The Record Company 960 Massachusetts Ave Boston, MA 02118	PC	To support facility expansion and renovation for fiscal years 2020 and 2021	175,000
		Subtotal Other Grants and Contributions	**175,000**
Total Part XV, Line 3b - Grants Approved for Future Payment			**$ 29,360,677**