Form **99**0

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

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

Department of the Treasury Internal Revenue Service

► Go to www.irs.gov/Form990 for instructions and the latest information.

ax year beginning JUL 1 . 2020 and ending JUN 30.

| 2020 |
|----------------|
| Open to Public |

| A | For the 2 | 020 calendar year, or tax year beginning $$ JUL 1 , 2020 | JUN 30, 202 | 1 |
|--------------------------------|----------------------|--|--------------------------------|--|
| | | C Name of organization | D Employer identi | |
| _ 6 | Check if applicable: | METROPOLITAN BOSTON HOUSING PARTNERSHIP | , | |
| | Address change | INC. D/B/A METRO HOUSING BOSTON | | |
| F | Name change | Doing business as | 04-27759 | 991 |
| F | Initial return | Number and street (or P.O. box if mail is not delivered to street address) Room/s | | |
| F | Final return/ | 1411 TREMONT STREET | 617-859 | |
| | termin- ated | City or town, state or province, country, and ZIP or foreign postal code | G Gross receipts \$ | 271,352,844. |
| | Amended | | H(a) Is this a group | |
| F | Applica- | F Name and address of principal officer: ANNE ROUSSEAU | | es?Yes X No |
| | pending | SAME AS C ABOVE | H(b) Are all subordinates | |
| $\overline{\Gamma}$ | Tax-exem | | | a list. See instructions |
| | | ▶ WWW.METROHOUSINGBOSTON.ORG | H(c) Group exempti | |
| | | · | | M State of legal domicile: MA |
| | | Summary | | ··· - ···· - · · · · · · · · · · · · · |
| _ | | iefly describe the organization's mission or most significant activities: METRO HC | USING BOSTON | MOBILIZES |
| Governance | · w | IDE-RANGING RESOURCES TO PROVIDE INNOVATIVE | AND PERSONAL | LIZED |
| 'n | _ | neck this box if the organization discontinued its operations or disposed of r | | |
| Ş. | | | 3 | 1 00 |
| Ğ | 1 | umber of independent voting members of the governing body (Part VI, line 1b) | ····· | |
| ري وي | | tal number of individuals employed in calendar year 2020 (Part V, line 2a) | ····· | |
| iţie | | tal number of volunteers (estimate if necessary) | | 10 |
| Activities | | tal unrelated business revenue from Part VIII, column (C), line 12 | | |
| ⋖ | | et unrelated business taxable income from Form 990-T, Part I, line 11 | | |
| | | · · · · · · · · · · · · · · · · · · · | Prior Year | Current Year |
| ø) | 8 C | ontributions and grants (Part VIII, line 1h) | 1,412,407 | |
| nŭ | | ogram service revenue (Part VIII, line 2g) | 178,826,693 | |
| Revenue | | vestment income (Part VIII, column (A), lines 3, 4, and 7d) | -252,279 | |
| ď | | her revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 33,823 | |
| | 1 | otal revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 180,020,644 | |
| | | ants and similar amounts paid (Part IX, column (A), lines 1-3) | 0 | |
| | 1 | enefits paid to or for members (Part IX, column (A), line 4) | 0 | . 0. |
| S | 1 | alaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 10,855,695 | 14,410,983. |
| Expenses | 16a Pr | ofessional fundraising fees (Part IX, column (A), line 11e) | 0 | |
| <u>e</u> | b To | otal fundraising expenses (Part IX, column (D), line 25) 371, 319. | | |
| ũ | 17 Ot | her expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | 169,975,462 | 252,437,171. |
| | | tal expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | | 266,848,154. |
| | 19 Re | evenue less expenses. Subtract line 18 from line 12 | -810,513 | 4,431,422. |
| or | | · | Beginning of Current Year | |
| sets | 20 To | tal assets (Part X, line 16) | 45,778,082 | |
| ASS | 21 To | tal liabilities (Part X, line 26) | 36,525,330 | 69,076,896. |
| Net Assets or Fund Balances | 22 Ne | et assets or fund balances. Subtract line 21 from line 20 | 9,252,752 | 14,821,882. |
| | | Signature Block | | |
| Und | ler penaltie | es of perjury, I declare that I have examined this return, including accompanying schedules and sta | atements, and to the best of r | my knowledge and belief, it is |
| true | , correct, a | and complete. Declaration of preparer (other than officer) is based on all information of which prep | oarer has any knowledge. | |
| | | | | |
| Sig | n | Signature of officer | Date | |
| Hei | re 🗎 | ANNE ROUSSEAU, TREASURER AND CFO | | |
| | | Type or print name and title | | |
| | Р | rint/Type preparer's name Preparer's signature | Date Check | PTIN |
| Pai | d E | RIC MAHONEY ERIC MAHONEY | 11/04/21 self-emplo | pol P01794716 |
| Pre | parer F | rm's name ▶ DANIEL DENNIS & COMPANY LLP | Firm's EIN | 04-2734675 |
| Use | Only F | rm's address 990 WASHINGTON STREET, STE 308A | | |
| | | DEDHAM, MA 02026 | Phone no. (| 517) 262-9898 |
| Ma | y the IRS | discuss this return with the preparer shown above? See instructions | | Yes No |
| | | | | 000 |

| Par | t III Statement of Program Service Accomplishments |
|-----------|--|
| | Check if Schedule O contains a response or note to any line in this Part III |
| 1 | Briefly describe the organization's mission: METRO HOUSING BOSTON MOBILIZES WIDE-RANGING RESOURCES TO PROVIDE |
| | INNOVATIVE AND PERSONALIZED SERVICES THAT LEAD FAMILIES AND |
| | INDIVIDUALS TO HOUSING STABILITY, ECONOMIC SECURITY, AND AN IMPROVED |
| | QUALITY OF LIFE. |
| 2 | Did the organization undertake any significant program services during the year which were not listed on the |
| _ | V. V. |
| | If "Yes," describe these new services on Schedule O. |
| 2 | · |
| 3 | Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X No If "Yes," describe these changes on Schedule O. |
| 4 | Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. |
| 7 | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and |
| | revenue, if any, for each program service reported. |
| 4a | (Code:) (Expenses \$ 261,054,860 • including grants of \$) (Revenue \$ 265,869,774 •) |
| та | RENTAL HOUSING ASSISTANCE - FEDERAL AND STATE FUNDED HOUSING VOUCHERS |
| | AND OTHER SUBSIDY PROGRAMS THAT SERVED MORE THAN 10,991 DISABLED, |
| | ELDERLY, FORMERLY HOMELESS, AND OTHER INDIVIDUALS AND FAMILIES IN |
| | BOSTON AND 31 SURROUNDING COMMUNITIES INCLUDING ARLINGTON, BEDFORD, |
| | BELMONT, BRAINTREE, BROOKLINE, BURLINGTON, CAMBRIDGE, CHELSEA, EVERETT, |
| | HOLBROOK, LEXINGTON, , MALDEN, MEDFORD, MELROSE, MILTON, NEWTON, NORTH |
| | READING, QUINCY, RANDOLPH, READING, REVERE, SOMERVILLE, STONEHAM, |
| | WAKEFIELD, WALTHAM, WATERTOWN, WEYMOUTH, WILMINGTON, WINCHESTER, |
| | WINTHROP AND WOBURN. METRO HOUSING BOSTON'S TARGET POPULATION CONSISTS |
| | OF HOUSEHOLDS WITH LOW- AND MODERATE-INCOMES WHO FACE A VARIETY OF |
| | BARRIERS TO HOUSING. FINANCIAL DEMOGRAPHICS FOR INDIVIDUALS RECEIVING |
| | METRO HOUSING SERVICES UNDER ALL OF THE RENTAL ASSISTANCE PROGRAMS, |
| 4b | (Code:) (Expenses \$ 3,878,465. including grants of \$) (Revenue \$ 3,011,140.) |
| | METRO HOUSING'S APPROACH IS "HOUSING FIRST, NOT HOUSING ONLY." THE |
| | HOUSING SUPPORTS PROGRAMS OFFER A CONTINUUM OF SERVICES FROM |
| | INFORMATION AND REFERRAL TO IN-DEPTH INDIVIDUALIZED CASE MANAGEMENT, |
| | INTENSIVE HOUSING SEARCH, AND EVICTION PREVENTION EDUCATION, SERVICES |
| | AND RESOURCES WHICH ADDRESS THE BARRIERS THAT MAKE IT DIFFICULT TO FIND |
| | OR MAINTAIN A HOME. HOUSING SUPPORTS ALSO ADMINISTERED \$150,000 IN |
| | PRIVATE FLEXIBLE FUNDS TO ASSIST 364 NON-RAFT ELIGIBLE FAMILIES AND |
| | INDIVIDUALS, AND \$5,445,300 IN CITY OF BOSTON EMERGENCY RENTAL RELIEF |
| | PROGRAMS TO 1,135 HOUSEHOLDS. IN ADDITON, MORE THAN 312 FAMILIES |
| | RECEIVED STABILIZATION ASSISTANCE THROUGH THE HOMEBASE PROGRAM, AND 89 |
| | HOMELESS FAMILIES WERE PLACED INTO PERMANENT HOUSING. |
| | METRO HOUSING CO-LOCATED WITH 13 PARTNERS THROUGHOUT OUR REGION TO |
| 4c | (Code:) (Expenses \$ 551,017. including grants of \$) (Revenue \$ 4,131.) |
| | OFFICE DEVELOPMENT AND OTHER CORPORATE ACTIVITIES |
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| | |
| 4d | Other program services (Describe on Schedule O.) |
| | (Expenses \$ including grants of \$) (Revenue \$) |
| <u>4e</u> | Total program service expenses ► 265,484,342. |
| | Form 990 (2020) |

Part IV Checklist of Required Schedules

| | | | Yes | No |
|-------------|--|------------|-----|------------------|
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? | | | |
| | If "Yes," complete Schedule A | 1 | X | |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors? | 2 | X | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for | | | |
| | public office? If "Yes," complete Schedule C, Part I | 3 | | Х |
| 4 | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect | | | |
| | during the tax year? If "Yes," complete Schedule C, Part II | 4 | Х | |
| 5 | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or | | | |
| | similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III | 5 | | X |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to | | | |
| | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I | 6 | | X |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, | | | |
| | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II | 7 | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete | | | |
| | Schedule D, Part III | 8 | | X |
| 9 | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for | | | |
| | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? | | | |
| | If "Yes," complete Schedule D, Part IV | 9 | | X |
| 10 | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments | | | |
| | or in quasi endowments? If "Yes," complete Schedule D, Part V | 10 | | X |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VIII, IX, or X | | | |
| | as applicable. | | | |
| а | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, | | 37 | |
| | Part VI | 11a | Х | |
| b | Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total | | | x |
| | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII | 11b | | |
| С | Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total | | | $ _{\mathbf{x}}$ |
| | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII | 11c | | |
| a | Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in | 444 | Х | |
| _ | Part X, line 16? If "Yes," complete Schedule D, Part IX Did the exemplete schedule D, Part X, line 353 If "Yes," complete Schedule D, Part X | 11d 11e | X | |
| e • | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X | TIE | 21 | |
| ' | the organization's separate of consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X | 11f | Х | |
| 19a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete | - ''' | | |
| 124 | Schedule D, Parts XI and XII | 12a | | х |
| b | Was the organization included in consolidated, independent audited financial statements for the tax year? | 124 | | |
| - | If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | 12b | Х | |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | | Х |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | 14a | | Х |
| b | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, | | | |
| | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 | | | |
| | or more? If "Yes," complete Schedule F, Parts I and IV | 14b | | Х |
| 15 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any | | | |
| | foreign organization? If "Yes," complete Schedule F, Parts II and IV | 15 | | Х |
| 16 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to | | | |
| | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV | 16 | | Х |
| 17 | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, | | | |
| | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I | 17 | | Х |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines | | | |
| | 1c and 8a? If "Yes," complete Schedule G, Part II | 18 | Х | |
| 19 | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," | | | |
| | complete Schedule G, Part III | 19 | | X |
| 20 a | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H | 20a | | X |
| b | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | 20b | | |
| 21 | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or | | | .,, |
| | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II | 21 | | X |

032003 12-23-20

Part IV Checklist of Required Schedules (continued)

| Yes No Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III |
|--|
| Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J. 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a. 24a X 25b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24b X 25c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 25c Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did to organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creat |
| and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J 23 X 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a 24b X 25 Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 24b X 25c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 25c Did the organization at as an "on behalf of" issuer for bonds outstanding at any time during the year? 25d Zet Complete Schedule L, Part I 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 25a X 25b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I 25d Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II 27d Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor? If "Yes," complete Schedule L, Part IV 28d Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV 28d Schedule Schedule L, Part IV 28d Schedule Schedule L, Part IV 28d Schedule Schedule L, Part IV 28d |
| Schedule J 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d |
| 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? 24c X 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 25a X b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-E27 If "Yes," complete Schedule L, Part I 25b X 26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II 26 X 27 Did the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV instructions, for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV 27 X 28 X Did the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV 28a X Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," co |
| last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a |
| b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 24d |
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| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 25a X b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I 25b X 26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II 27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? If "Yes," complete Schedule L, Part III. 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? If "Yes," complete Schedule L, Part IV 28 A family member of any individual described in line 28a? If "Yes," complete Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 29 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? |
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| 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete |
| |
| Schedule N, Part II 32 A |
| 00 0000 0 0000 0 0000 0 0000 0 0000 0 0000 |
| 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes." complete Schedule R. Part I |
| sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I |
| Part V, line 1 |
| 35a Did the organization have a controlled entity within the meaning of section 512(b)(13)? 35a X |
| b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity |
| within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 |
| 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? |
| If "Yes," complete Schedule R, Part V, line 2 36 X |
| 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization |
| and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI |
| 38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? |
| Note: All Form 990 filers are required to complete Schedule O |
| |
| Check if Schedule O contains a response or note to any line in this Part V Yes No |
| 1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable |
| b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable 1b 0 |
| c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming |
| (gambling) winnings to prize winners? |

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

| | | | Yes | No |
|-----|--|-----------------|-----|-------|
| 2a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return 2a 188 | | | |
| | | _ | Х | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | 2b | | |
| 0- | Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) | 0- | | Х |
| | Did the organization have unrelated business gross income of \$1,000 or more during the year? | 3a 3b | | 1 |
| | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a | 30 | | |
| 44 | financial account in a foreign country (such as a bank account, securities account, or other financial account)? | 4a | | x |
| h | If "Yes," enter the name of the foreign country | -1 a | | |
| b | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). | | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | 5a | | х |
| | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | 5b | | X |
| | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | 5c | | |
| | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit | " | | |
| | any contributions that were not tax deductible as charitable contributions? | 6a | | Х |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts | | | |
| | were not tax deductible? | 6b | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | | |
| а | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? | 7a | | Х |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | 7b | | |
| С | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required | | | |
| | to file Form 8282? | 7с | | X |
| d | If "Yes," indicate the number of Forms 8282 filed during the year | | | |
| е | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | 7e | | |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 7f | | |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? \dots | 7g | | |
| h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | 7h | | |
| 8 | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the | | | |
| | sponsoring organization have excess business holdings at any time during the year? | 8 | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | | |
| а | Did the sponsoring organization make any taxable distributions under section 4966? | 9a | | |
| b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | 9b | | |
| 10 | Section 501(c)(7) organizations. Enter: | | | |
| a | Initiation fees and capital contributions included on Part VIII, line 12 | | | |
| b | | _ | | |
| 11 | Section 501(c)(12) organizations. Enter: Gross income from members or shareholders | | | |
| | Gross income from members or shareholders | | | |
| D | amounts due or received from them.) | | | |
| 12a | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | 12a | | |
| | If "Yes," enter the amount of tax-exempt interest received or accrued during the year | | | |
| 13 | Section 501(c)(29) qualified nonprofit health insurance issuers. | | | |
| | Is the organization licensed to issue qualified health plans in more than one state? | 13a | | |
| | Note: See the instructions for additional information the organization must report on Schedule O. | | | |
| b | Enter the amount of reserves the organization is required to maintain by the states in which the | | | |
| | organization is licensed to issue qualified health plans | | | |
| С | Enter the amount of reserves on hand | | | |
| 14a | Did the organization receive any payments for indoor tanning services during the tax year? | 14a | | Х |
| b | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O | 14b | | |
| 15 | Is the organization 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? | 15 | | Х |
| | If "Yes," see instructions and file Form 4720, Schedule N. | | | |
| 16 | Is the organization an educational institution subject to the section 4968 excise tax on net investment income? | 16 | | X |
| | If "Yes," complete Form 4720, Schedule O. | | 000 | /0051 |

04 - 2775991

Form 990 (2020) Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

| | Check if Schedule O contains a response or note to any line in this Part VI | | | X |
|-----|--|---------|---------|------|
| Sec | tion A. Governing Body and Management | | | |
| | | | Yes | No |
| 1a | Enter the number of voting members of the governing body at the end of the tax year la | | | |
| | If there are material differences in voting rights among members of the governing body, or if the governing | | | |
| | body delegated broad authority to an executive committee or similar committee, explain on Schedule O. | | | |
| b | Enter the number of voting members included on line 1a, above, who are independent 1b 22 | | | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other | | | |
| | officer, director, trustee, or key employee? | 2 | | X |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision | | | |
| | of officers, directors, trustees, or key employees to a management company or other person? | 3 | | X |
| 4 | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? | 4 | | X |
| 5 | Did the organization become aware during the year of a significant diversion of the organization's assets? | 5 | | X |
| 6 | Did the organization have members or stockholders? | 6 | | X |
| 7a | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or | | | |
| | more members of the governing body? | 7a | | X |
| b | | | | |
| | persons other than the governing body? | 7b | | X |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | |
| а | The governing body? | 8a | X | |
| b | Each committee with authority to act on behalf of the governing body? | 8b | X | |
| 9 | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the | | | |
| | organization's mailing address? If "Yes," provide the names and addresses on Schedule O | 9 | | X |
| Sec | tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) | | | |
| | | | Yes | No |
| 10a | Did the organization have local chapters, branches, or affiliates? | 10a | | X |
| b | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, | | | |
| | and branches to ensure their operations are consistent with the organization's exempt purposes? | 10b | | |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | 11a | Х | |
| b | Describe in Schedule O the process, if any, used by the organization to review this Form 990. | | | |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13 | 12a | Х | |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | Х | |
| С | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe | | | |
| | in Schedule O how this was done | 12c | X | |
| 13 | Did the organization have a written whistleblower policy? | 13 | X | |
| 14 | Did the organization have a written document retention and destruction policy? | 14 | X | |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent | | | |
| | persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | | |
| а | The organization's CEO, Executive Director, or top management official | 15a | X | |
| b | Other officers or key employees of the organization | 15b | Х | |
| | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). | | | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a | | | 77 |
| | taxable entity during the year? | 16a | | X |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation | | | |
| | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's | | | |
| | exempt status with respect to such arrangements? | 16b | | |
| | tion C. Disclosure | | | |
| 17 | List the states with which a copy of this Form 990 is required to be filed MA | | | |
| 18 | Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3 |)s only |) avail | able |
| | for public inspection. Indicate how you made these available. Check all that apply. | | | |
| 40 | X Own website Another's website X Upon request Other (explain on Schedule O) | -1.0 | | |
| 19 | Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and the transfer of the transfer o | a tinai | ncial | |
| 00 | statements available to the public during the tax year. | | | |
| 20 | State the name, address, and telephone number of the person who possesses the organization's books and records ► ANNE ROUSSEAU − 617−859−0400 | | | |
| | 1411 TREMONT STREET, BOSTON, MA 02120-3401 | | | |
| | | | | |

032006 12-23-20

Form 990 (2020)

INC. D/B/A METRO HOUSING BOSTON

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated **Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's former officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

See instructions for the order in which to list the persons above.

| (A) | (B) | (C) | | | | | (D) | (F) | | |
|----------------------------|---------------------|--------------------------------|-----------------------|---------|--------------|------------------------------|--------|---------------------|----------------------------------|--------------------------|
| Name and title | Average | (do not d | | Pos | | | one | Reportable | Reportable | Estimated |
| | hours per | box | , unles | ss pe | rson i | is bot | h an | compensation | compensation | amount of |
| | week | | Cer an | uau | recio | ii us | iee) | from | from related | other |
| | (list any hours for | Individual trustee or director | | | | L | | the organization | organizations (W-2/1099-MISC) | compensation from the |
| | related | e or c | stee | | | satec | | (W-2/1099-MISC) | (***2/1099*****130) | organization |
| | organizations | truste | al trus | | yee | mper | | (** 27 1000 111100) | | and related |
| | below | idual | Institutional trustee | ie i | Key employee | Highest compensated employee | er | | | organizations |
| | line) | Indiv | Instit | Officer | Keye | High empl | Former | | | |
| (1) CHRISTOPHER T. NORRIS | 40.00 | | | | | | | | | _ |
| PRESIDENT/EXEC. DIRECTOR | | | | Х | | | | 219,477. | 0. | 20,754. |
| (2) ANNE ROUSSEAU | 40.00 | | | | | | | | | _ |
| TREASURER/CFO | | | | Х | | | | 161,826. | 0. | 6,364. |
| (3) SUSAN NOHL | 40.00 | | | | | | | | | _ |
| DEPUTY DIRECTOR | | 1 | | Х | | | | 149,877. | 0. | 8,586. |
| (4) AKIDA NAU | 40.00 | | | | | | | | | |
| DIRECTOR OF IT | | | | | | Х | | 109,711. | 0. | 23,485. |
| (5) STEVEN D FARRELL | 40.00 | | | | | | | | | |
| CHIEF OPERATING OFFICER | | | | | | Х | | 115,925. | 0. | 11,530. |
| (6) BRUNETTE B-JARAMILLO | 40.00 | | | | | | | | | |
| DIRECTOR OF LEASED HOUSING | | 1 | | | | Х | | 102,517. | 0. | 23,837. |
| (7) CARLA BEAUDOIN | 40.00 | | | | | | | | | |
| DIRECTOR OF DEVELOPMENT | | | | | | Х | | 101,644. | 0. | 23,431. |
| (8) JOHN HILLIS | 40.00 | | | | | | | | | |
| DIRECTOR OF INSPECTIONS | | 1 | | | | Х | | 104,016. | 0. | 5,169. |
| (9) ELIZABETH GRUBER | 1.00 | | | | | | | | | |
| BOARD CO-CHAIR | | Х | | Х | | | | 0. | 0. | 0. |
| (10) CYNTHIA LACASSE | 1.00 | | | | | | | | | _ |
| BOARD CO-CHAIR | | Х | | Х | | | | 0. | 0. | 0. |
| (11) TERRY SAUNDERS LANE | 1.00 | | | | | | | | | |
| CLERK | | Х | | Х | | | | 0. | 0. | 0. |
| (12) NADER ACEVEDO | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (13) STEPHEN ADAMO | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (14) KEVIN BOYLE | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (15) SUSANNE CAMERON | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (16) YONGMEI CHEN | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (17) CASSANDRA M. CLAY | 1.00 | | | | | | | | | |
| DIRECTOR | | Х | | | L | L | L | 0. | 0. | 0. |
| 032007 12-23-20 | | | | | | | | | | Form 990 (2020) |

032007 12-23-20

Form 990 (2020)

| Part VIII a .: A or: B: J | | • | | | | | | | (| JJE Tago C | | |
|--|-------------------|--------------------------------|-----------------------|-----------|--------------|------------------------------|---------------------------------------|-------------------------|----------------------------------|-----------------------|--|--|
| Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) (A) (B) (C) (D) (E) (F) | | | | | | | | | | | | |
| | 1 ' ' | | | ر) Pos | | | | (D) | ` ′ | (F) | | |
| Name and title | Average | | not c | heck | more | than | | Reportable | Reportable | Estimated | | |
| | hours per week | | | | | is bot or/trus | | compensation | compensation | amount of | | |
| | (list any | _ | T | | | | , , , , , , , , , , , , , , , , , , , | from | from related | other | | |
| | hours for | irecto | | | | | | the organization | organizations (W-2/1099-MISC) | compensation from the | | |
| | related | e or d | tee | | | sated | | (W-2/1099-MISC) | (W-2/1099-WII3C) | organization | | |
| | organizations | ruste | l trus | | e e | mpen | | (** 2/ 1033 1/1100) | | and related | | |
| | below | dualt | tiona | ١ | nploy | st col | <u></u> | | | organizations | | |
| | line) | Individual trustee or director | Institutional trustee | Officer | key employee | Highest compensated employee | Former | | | | | |
| (18) ROBERT TORRES | 1.00 | | | | _ | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (19) MELISSA FISH-CRANE | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (20) JANET FRAZIER | 1.00 | | | | | | | _ | _ | _ | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (21) LANGLEY KEYES | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (22) JOSEPH KRIESBERG | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (23) MARY-ANNE MORRISON | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (24) RICHARD MURAIDA | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (25) PETER MUNKENBECK | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| (26) JEFFREY H. PACKARD | 1.00 | | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | | |
| 1b Subtotal | | | | | | | > | 1,064,993. | 0. | 123,156. | | |
| c Total from continuation sheets to Part \ | /II, Section A | | | | | | ightharpoons | 0. | 0. | 0. | | |
| d Total (add lines 1b and 1c) | | | | | | | | 1,064,993. | 0. | 123,156. | | |
| 2 Total number of individuals (including but | not limited to th | ose | liste | ed al | bove | e) wł | no re | eceived more than \$100 | 0,000 of reportable | | | |

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization

Yes No

3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

5 X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A) | (B) | (C) |
|---|----------------------------------|--------------|
| Name and business address | Description of services | Compensation |
| REGIONAL HOUSING NETWORK | | |
| ONE BEACON STREET, BOSTON, MA 02108 | HCEC CONTRACTOR | 227,222. |
| SMC PARTNERS, LLC | PROFESSIONAL | |
| 10 COLUMBUS BOULEVARD, HARTFORD, CT 06106 | SERVICES | 216,130. |
| COMPASS WORKING CAPITAL | FSS PROGRAM | |
| 89 SOUTH STREET, BOSTON, MA 02111 | CONTRACTOR | 192,252. |
| PLANET PROFESSIONAL | TEMP STAFFING | |
| P.O. BOX 845054, BOSTON, MA 02284 | SOLUTION | 141,489. |
| CARAHSOFT TECHNOLOGY GROUP | EQUIFAX SOCIAL | |
| 11493 SUNSET HILLS RD, RESTON, VA 20190 | SERVICE VERIFICATION | 100,399. |
| 2 Total number of independent contractors (including but not limited to those liste | ed above) who received more than | |
| \$100,000 of compensation from the organization > 5 | | |

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 990 (2020)

8

| Form 990 INC. D/ | B/A METR | O I | JOE | JS] | INC | 3 E | 308 | STON | 04-277 | 5991 |
|--|---|--------------------------------|------------------------------------|---------|--------------|------------------------------|--------|--|--|---|
| Part VII Section A. Officers, Directors, | Trustees, Key E | mplo | oyee | s, a | nd F | ligh | est | Compensated Employ | yees (continued) | |
| (A) Name and title | (B) Average hours | (cl | (C) Position check all that apply) | | | | ly) | (D) Reportable compensation | (E) Reportable compensation | (F) Estimated amount of |
| | per week (list any hours for related organizations below line) | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | from the organization (W-2/1099-MISC) | from related organizations (W-2/1099-MISC) | other compensatior from the organization and related organizations |
| 27) ESTHER SCHLORHOLTZ | 1.00 | x | | | | | | 0. | 0. | O |
| 28) GEOFFREY SHERMAN | 1.00 | | | | | | | | | |
| DIRECTOR | 1.00 | Х | | | | | | 0. | 0. | (|
| (29) DONALD E. VAUGHAN DIRECTOR | 1.00 | X | | | | | | 0. | 0. | (|
| (30) MICHAEL WIDMER | 1.00 | | | | | | | • | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | (|
| | | 1 | | | | | | | | |
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| Pa | πv | | | | 5 | | | |
|--|----|------------|---|--------------------|----------------------|-------------------|------------------|--------------------------------------|
| | | | Check if Schedule O contains a response | or note to any lin | ne in this Part VIII | (B) | (C) | (D) |
| | | | | | Total revenue | Related or exempt | Unrelated | Revenue excluded |
| | | | | | | function revenue | business revenue | from tax under sections 512 - 514 |
| υs | _ | _ | Endoubled committees | | | | | 300010113 3 12 3 14 |
| ant | | | Federated campaigns 1a | | | | | |
| קם פ | | | Membership dues 1b | 276 002 | | | | |
| Contributions, Gifts, Grants and Other Similar Amounts | | | Fundraising events 1c Related organizations 1d | 276,882. | | | | |
| i, G | | | | | | | | |
| Sir | | | Government grants (contributions) 1e All other contributions, gifts, grants, and | | | | | |
| her | | ٠ | similar amounts not included above 1f | 1,625,854. | | | | |
| QF | | ~ | ··· · · · · · · · · · · · · · · · · · | 1,023,034. | | | | |
| Son | | _ | | | 1,902,736. | | | |
| <u> </u> | | <u>'''</u> | Total. Add lines 1a-1f | Business Code | 1,302,730. | | | |
| o o | _ | _ | PROGRAM SERVICE FEES AND REIMBURS | 532000 | 268,882,864. | 268,882,864. | | |
| vice | 2 | - | TROGRAM DERVICE FEED AND REIMDORD | 332000 | 200,002,004. | 200,002,004. | | |
| Program Service Revenue | | b | | | | | | |
| ın (| | c d | | | | | | |
| gra Re | | | | | | | | |
| Pro | | e f | All other program service revenue | | | | | |
| | | | Total. Add lines 2a-2f | | 268,882,864. | | | |
| | 3 | 9 | Investment income (including dividends, inter | | | | | |
| | | | other similar amounts) | , | 491,795. | | | 491,795. |
| | 4 | | Income from investment of tax-exempt bond | | , | | | , |
| | 5 | | Royalties | | | | | |
| | | | (i) Real | (ii) Personal | | | | |
| | 6 | а | Gross rents 6a | | | | | |
| | | | Less: rental expenses 6b | | | | | |
| | | | Rental income or (loss) 6c | | | | | |
| | | | Net rental income or (loss) | | | | | |
| | | | Gross amount from sales of (i) Securities | (ii) Other | | | | |
| | | | assets other than inventory 7a | | | | | |
| | | b | Less: cost or other basis | | | | | |
| ne | | | and sales expenses7b | | | | | |
| Revenue | | С | Gain or (loss) 7c | | | | | |
| Re | | d | Net gain or (loss) | | | | | |
| Jer | | | Gross income from fundraising events (not | | | | | |
| ₹ | | | including \$ 276,882. of | | | | | |
| | | | contributions reported on line 1c). See | | | | | |
| | | | Part IV, line 18 | 73,268. | | | | |
| | | b | Less: direct expenses 8b | 73,268. | | | | |
| | | С | Net income or (loss) from fundraising events | , | 0. | | | |
| | 9 | а | Gross income from gaming activities. See | | | | | |
| | | | Part IV, line 19 | 1 | | | | |
| | | | Less: direct expenses 9b | | | | | |
| | | С | Net income or (loss) from gaming activities | | | | | |
| | 10 | а | Gross sales of inventory, less returns | | | | | |
| | | | and allowances10a | - | | | | |
| | | b | Less: cost of goods sold 101 | b | | | | |
| | | С | Net income or (loss) from sales of inventory | | | | | |
| SZ | | | | Business Code | | | | |
| ne ne | | | OTHER INCOME | 532000 | 2,181. | 2,181. | | |
| Miscellaneous Revenue | | b | | | | | | |
| Re | | C | | | | | | |
| Ĕ | | | All other revenue | | 2.45 | | | |
| | | е | Total. Add lines 11a-11d | | 2,181. | 060 007 017 | - | 104 = 25 |
| | 12 | | Total revenue. See instructions | | 271,279,576. | 268,885,045. | 0. | 491,795. |

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Form 990 (2020)

Part IX | Statement of Functional Expenses

| 2000 | ion 501(c)(3) and 501(c)(4) organizations must con Check if Schedule O contains a respo | - | | p.o.o oolaniin (r y. | |
|---|---|----------------------|------------------------------|-------------------------------------|---------------------------|
| | not include amounts reported on lines 6b, 8b, 9b, and 10b of Part VIII. | (A) Total expenses | (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
| 1 | Grants and other assistance to domestic organizations | | | garranary | |
| | and domestic governments. See Part IV, line 21 | | | | |
| 2 | Grants and other assistance to domestic | | | | |
| | individuals. See Part IV, line 22 | | | | |
| 3 | Grants and other assistance to foreign | | | | |
| | organizations, foreign governments, and foreign | | | | |
| 4 | individuals. See Part IV, lines 15 and 16 | | | | |
| 4 | Benefits paid to or for members | | | | |
| 5 | Compensation of current officers, directors, trustees, and key employees | 542,662. | 504,856. | 25,356. | 12,450. |
| 6 | Compensation not included above to disqualified | 342,002. | 304,030. | 23,330. | 12,150 |
| Ü | persons (as defined under section 4958(f)(1)) and | | | | |
| | persons described in section 4958(c)(3)(B) | | | | |
| 7 | Other salaries and wages | 11,359,366. | 10,567,983. | 530,769. | 260,614. |
| 8 | Pension plan accruals and contributions (include | , , , , , , , , , | ., , | | , |
| - | section 401(k) and 403(b) employer contributions) | 202,744. | 188,726. | 9,605. | 4,413. |
| 9 | Other employee benefits | 2,289,827. | 2,131,501. | 108,481. | 49,845. |
| 10 | Payroll taxes | 16,384. | 15,251. | 776. | 4,413. 49,845. 357. |
| 11 | Fees for services (nonemployees): | | | | |
| а | Management | | | | |
| | Legal | 24,142. | 21,450. | 2,691. | 1. |
| | Accounting | 68,397. | 60,771. | 7,624. | 1. 2. |
| | Lobbying | | | | |
| е | Professional fundraising services. See Part IV, line 17 | | | | |
| f | Investment management fees | | | | |
| g | Other. (If line 11g amount exceeds 10% of line 25, | | | | |
| | column (A) amount, list line 11g expenses on Sch O.) | 790,843. | | 165,308. | |
| 12 | Advertising and promotion | 74,796. | 71,145. | 3,651. | |
| 13 | Office expenses | 41,010. | 34,502. | 2,999. | 3,509. |
| 14 | Information technology | | | | |
| 15 | Royalties | 500 501 | 605 455 | 5 34 3 | 4.4 |
| 16 | Occupancy | 692,501. | 687,177. | 5,310. | 14. |
| 17 | Travel | 22,085. | 21,874. | 211. | |
| 18 | Payments of travel or entertainment expenses | | | | |
| | for any federal, state, or local public officials \dots | 24 200 | 4 256 | 10 201 | 17 700 |
| 19 | Conferences, conventions, and meetings | 34,300. 286,915. | 4,256. | 12,321. | 17,723. |
| 20 | Interest | 286,915. | 277,719. | 9,183. | 13. |
| 21 | Payments to affiliates | 125 042 | 132,524. | 2 071 | 117 |
| 22 | Depreciation, depletion, and amortization | 135,942. 148,913. | 143,800. | 2,971. 5,108. | 447. 5. |
| 23 | Insurance | 140,913. | 143,000. | 3,100. | <u> </u> |
| 24 | Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If | | | | |
| | line 24è amount exceeds 10% of line 25, column (A) | | | | |
| | amount, list line 24e expenses on Schedule 0.) RENTAL SUBSIDIES | 247,099,460. | 247 099 460 | 0. | 0. |
| a | PAYMENTS TO SUBGRANTEES | 1,192,291. | 1,192,291. | 0. | 0. |
| b | CONTRACT SERVICES | 840,171. | 804,725. | 23,435. | 12,011. |
| c d | POSTAGE | 85,768. | 82,473. | 3,088. | 207. |
| | All other expenses | 899,637. | 816,323. | 73,606. | 9,708. |
| е 25 | | 266,848,154. | | 992,493. | 371,319. |
| <u>25 </u> | Joint costs. Complete this line only if the organization | ,, | ,, | , | , , |
| | reported in column (B) joint costs from a combined | | | | |
| | educational campaign and fundraising solicitation. | | | | |
| | Check here if following SOP 98-2 (ASC 958-720) | | | | |
| | n 12 22 20 | | | | Form 990 (2020) |

Form 990 (2020)

Part X Balance Sheet

| Pa | rt X | Balance Sheet | | | |
|-----------------------------|------|--|---------------------------------|-----|---------------------------|
| | | Check if Schedule O contains a response or note to any line in this Part X | | | |
| | | | (A) Beginning of year | | (B) End of year |
| | 1 | Cash - non-interest-bearing | 3,878,081. | 1 | 4,245,244. |
| | 2 | Savings and temporary cash investments | | 2 | |
| | 3 | Pledges and grants receivable, net | | 3 | |
| | 4 | Accounts receivable, net | | 4 | 8,380,538 |
| | 5 | Loans and other receivables from any current or former officer, director, | | | |
| | | trustee, key employee, creator or founder, substantial contributor, or 35% | | | |
| | | controlled entity or family member of any of these persons | | 5 | |
| | 6 | Loans and other receivables from other disqualified persons (as defined | | | |
| | | under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) | | 6 | |
| ţ | 7 | Notes and loans receivable, net | 12,142,979. | 7 | 12,846,480 |
| Assets | 8 | Inventories for sale or use | | 8 | |
| Ŕ | 9 | Prepaid expenses and deferred charges | 92 368 | 9 | 51,365 |
| | 10a | Land, buildings, and equipment: cost or other | | | |
| | | basis. Complete Part VI of Schedule D 10a 936,0 | | | |
| | b | Less: accumulated depreciation 10b 298,0 | | 10c | 637,947. |
| | 11 | Investments - publicly traded securities | 6,455,437 | 11 | 8,488,899 |
| | 12 | Investments - other securities. See Part IV, line 11 | | 12 | |
| | 13 | Investments - program-related. See Part IV, line 11 | | 13 | |
| | 14 | Intangible assets | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | 17,764,123. | | 49,248,305 |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 33) | 45,778,082. | | 83,898,778 |
| | 17 | Accounts payable and accrued expenses | 4,055,309 | 17 | 3,923,342. |
| | 18 | Grants payable | | 18 | |
| | 19 | Deferred revenue | 13,490,753 | | 46,363,232 |
| | 20 | Tax-exempt bond liabilities | 7,851,497. | 20 | 7,628,393. |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | 21 | |
| es | 22 | Loans and other payables to any current or former officer, director, | | | |
| Liabilities | | trustee, key employee, creator or founder, substantial contributor, or 35% | | | |
| jab | | controlled entity or family member of any of these persons | | 22 | |
| _ | 23 | Secured mortgages and notes payable to unrelated third parties | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | 24 | |
| | 25 | Other liabilities (including federal income tax, payables to related third | | | |
| | | parties, and other liabilities not included on lines 17-24). Complete Part X | 11 100 001 | | 11 161 000 |
| | | of Schedule D | | 25 | 11,161,929. |
| | 26 | Total liabilities. Add lines 17 through 25 | 36,525,330. | 26 | 69,076,896. |
| Ş | | Organizations that follow FASB ASC 958, check here ▶ X | | | |
| nce | l | and complete lines 27, 28, 32, and 33. | 0 252 752 | | 14 001 000 |
| ala | 27 | Net assets without donor restrictions | | + | 14,821,882. |
| Б | 28 | Net assets with donor restrictions | | 28 | |
| 'n | | Organizations that do not follow FASB ASC 958, check here | | | |
| ō | | and complete lines 29 through 33. | | | |
| ets | 29 | Capital stock or trust principal, or current funds | | 29 | |
| \SS(| 30 | Paid-in or capital surplus, or land, building, or equipment fund | | 30 | |
| Net Assets or Fund Balances | 31 | Retained earnings, endowment, accumulated income, or other funds | | 31 | 1/ 021 002 |
| ž | 32 | Total net assets or fund balances | | | 14,821,882. |
| | 33 | Total liabilities and net assets/fund balances | 45,778,082. | 33 | 83,898,778. |

| 4-2775991 | Page 12 |
|-----------|----------------|
| | |

| Ра | rt XI Reconciliation of Net Assets | | | | | |
|----|---|---------|----------|------|--------------|-----|
| | Check if Schedule O contains a response or note to any line in this Part XI | | <u>.</u> | | | |
| | | | | | | |
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | | L,27 | | |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | | 7,84 | | |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | | 1,43 | | |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) | 4 | | , 25 | | |
| 5 | Net unrealized gains (losses) on investments | 5 | | L,13 | 7 , 7 | 08. |
| 6 | Donated services and use of facilities | 6 | | | | |
| 7 | Investment expenses | 7 | | | | |
| 8 | Prior period adjustments | 8 | | | | |
| 9 | Other changes in net assets or fund balances (explain on Schedule O) | 9 | | | | 0. |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, | | | | | |
| | column (B)) | 10 | 14 | 1,82 | <u>1,8</u> | 82. |
| Pa | rt XII Financial Statements and Reporting | | | | | |
| | Check if Schedule O contains a response or note to any line in this Part XII | | | | | Ш |
| | | | | | Yes | No |
| 1 | Accounting method used to prepare the Form 990: Cash X Accrual Other | | | | | |
| | If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule | O. | | | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | | | 2a | | X |
| | If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed | d on a | | | | |
| | separate basis, consolidated basis, or both: | | | | | |
| | Separate basis Consolidated basis Both consolidated and separate basis | | | | | |
| b | Were the organization's financial statements audited by an independent accountant? | | | 2b | Х | |
| | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separat | e basis | 3, | | | |
| | consolidated basis, or both: | | | | | |
| | Separate basis X Consolidated basis Both consolidated and separate basis | | | | | |
| С | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the | e audit | t, | | | |
| | review, or compilation of its financial statements and selection of an independent accountant? | | | 2c | Х | |
| | If the organization changed either its oversight process or selection process during the tax year, explain on Scl | nedule | Ο. | | | |
| 3a | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Si | ngle Au | ıdit | | | |
| | Act and OMB Circular A-133? | | | За | Х | |
| b | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required | ired au | ıdit | | | |
| | or audits, explain why on Schedule O and describe any steps taken to undergo such audits | | | 3b | Х | |

SCHEDULE A

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

Name of the organization

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

METROPOLITAN BOSTON HOUSING PARTNERSHIP

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

INC. D/B/A METRO HOUSING BOSTON 04 - 2775991Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions. The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.) 1 A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i). 2 A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).) 3 A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.) A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). 7 X An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.) 8 A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.) An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.) 11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4). 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g. Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B. Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV. Sections A and C. ☐ Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E. Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V. Check this box if the organization received a written determination from the IRS that it is a Type I, Type III, Type III functionally integrated, or Type III non-functionally integrated supporting organization. f Enter the number of supported organizations Provide the following information about the supported organization(s). (iv) Is the organization listed (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other in your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) Yes above (see instructions)) Total

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Sec | ction A. Public Support | | | | | | |
|-----------------|--|-----------------------|-----------------------|----------------------|---------------------|-------------------------|---|
| Cale | ndar year (or fiscal year beginning in) | (a) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (f) Total |
| 1 | Gifts, grants, contributions, and | | | | | | |
| | membership fees received. (Do not | | | | | | |
| | include any "unusual grants.") | 1303057. | 1576599. | 1155869. | 1513895. | 1976004. | 7525424. |
| 2 | Tax revenues levied for the organ- | | | | | | |
| | ization's benefit and either paid to | | | | | | |
| | or expended on its behalf | | | | | | |
| 3 | The value of services or facilities | | | | | | |
| | furnished by a governmental unit to | | | | | | |
| | the organization without charge | 1202055 | 1556500 | 1155060 | 1512005 | 1076004 | 7505404 |
| 4 | Total. Add lines 1 through 3 | 1303057. | 1576599. | 1155869. | 1513895. | 1976004. | 7525424. |
| 5 | The portion of total contributions | | | | | | |
| | by each person (other than a | | | | | | |
| | governmental unit or publicly | | | | | | |
| | supported organization) included | | | | | | |
| | on line 1 that exceeds 2% of the | | | | | | |
| | amount shown on line 11, | | | | | | |
| _ | column (f) | | | | | | 7525424. |
| <u>6</u> Sec | Public support. Subtract line 5 from line 4. | | | | | | 7323424. |
| | ndar year (or fiscal year beginning in) | (a) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (f) Total |
| | Amounts from line 4 | 1303057. | 1576599. | 1155869. | 1513895. | 1976004. | 7525424. |
| | Gross income from interest, | 2333371 | 23703330 | | 2020000 | 23700021 | , |
| Ü | dividends, payments received on | | | | | | |
| | securities loans, rents, royalties, | | | | | | |
| | and income from similar sources | 54,213. | 116,351. | 248,359. | -252,279. | 491,795. | 658,439. |
| 9 | Net income from unrelated business | , | , , , | | , , | , , , | |
| _ | activities, whether or not the | | | | | | |
| | business is regularly carried on | | | | | | |
| 10 | Other income. Do not include gain | | | | | | |
| | or loss from the sale of capital | | | | | | |
| | assets (Explain in Part VI.) | | | | | | |
| 11 | Total support. Add lines 7 through 10 | | | | | | 8183863. |
| 12 | Gross receipts from related activities, | etc. (see instruction | ons) | | | 12 914 | ,882,339. |
| 13 | First 5 years. If the Form 990 is for the | ne organization's fi | rst, second, third, | fourth, or fifth tax | year as a section 5 | 501(c)(3) | |
| | organization, check this box and stop | | | | | | <u></u> ▶□ |
| | ction C. Computation of Publ | | | | | | 04 05 |
| 14 | Public support percentage for 2020 (| | | | | 14 | 91.95 % |
| 15 | Public support percentage from 2019 | | | | | 15 | 96.73 % |
| 16a | 33 1/3% support test - 2020. If the o | • | | • | | • | |
| | stop here. The organization qualifies | | | | | | |
| b | 33 1/3% support test - 2019. If the c | | | | | | |
| | and stop here. The organization qual | | | | | | |
| 17a | 10% -facts-and-circumstances tes | - | | | | | |
| | and if the organization meets the fact | | | | | _ | |
| | meets the facts-and-circumstances to | - | | | - | | |
| b | 10% -facts-and-circumstances tes | - | | | | | 10% Or |
| | more, and if the organization meets the | | • | | • | | ▶□ |
| 10 | organization meets the facts-and-circ | | | • | | | |
| 10 | Private foundation. If the organization | TI GIU HOL CHECK A | DUN UIT III IE TO, TO | a, 100, 17a, 01 171 | u, uneur uns bux s | 1110 300 11131111011011 | o |

Schedule A (Form 990 or 990-EZ) 2020

Schedule A (Form 990 or 990-EZ) 2020 INC. D/B/A METRO HOUSING BOSTON

Part III | Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Sec | ction A. Public Support | now, please com | ipiete i ait ii.) | | | | |
|------------|--|--------------------|----------------------|---------------------|-------------------|-------------|--------------|
| | ndar year (or fiscal year beginning in) | (a) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (f) Total |
| | Gifts, grants, contributions, and | | , , | , , | ` , | | |
| | membership fees received. (Do not | | | | | | |
| | include any "unusual grants.") | | | | | | |
| 2 | Gross receipts from admissions, | | | | | | |
| | merchandise sold or services per- | | | | | | |
| | formed, or facilities furnished in | | | | | | |
| | any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 2 | Gross receipts from activities that | | | | | | |
| 3 | are not an unrelated trade or bus- | | | | | | |
| | | | | | | | |
| 4 | | | | | | | - |
| 4 | Tax revenues levied for the organ- | | | | | | |
| | ization's benefit and either paid to | | | | | | |
| _ | or expended on its behalf | | | | | | |
| 5 | The value of services or facilities | | | | | | |
| | furnished by a governmental unit to | | | | | | |
| | the organization without charge | | | | | | |
| | Total. Add lines 1 through 5 | | | | | | |
| 7 <i>a</i> | Amounts included on lines 1, 2, and | | | | | | |
| | 3 received from disqualified persons | | | | | | |
| b | Amounts included on lines 2 and 3 received from other than disqualified persons that | | | | | | |
| | exceed the greater of \$5,000 or 1% of the | | | | | | |
| | amount on line 13 for the year | | | | | | |
| | Add lines 7a and 7b | | | | | | |
| 8 | Public support. (Subtract line 7c from line 6.) | | | | | | |
| Sec | ction B. Total Support | | | | | _ | 1 |
| | ndar year (or fiscal year beginning in) 🖊 | (a) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (f) Total |
| 9 | Amounts from line 6 | | | | | | |
| 10 a | Gross income from interest, | | | | | | |
| | dividends, payments received on securities loans, rents, royalties, | | | | | | |
| | and income from similar sources | | | | | | |
| b | Unrelated business taxable income | | | | | | |
| | (less section 511 taxes) from businesses | | | | | | |
| | acquired after June 30, 1975 | | | | | | |
| c | Add lines 10a and 10b | | | | | | |
| | Net income from unrelated business | | | | | | |
| | activities not included in line 10b, | | | | | | |
| | whether or not the business is regularly carried on | | | | | | |
| 12 | Other income. Do not include gain | | | | | | |
| | or loss from the sale of capital | | | | | | |
| 12 | assets (Explain in Part VI.) Total support. (Add lines 9, 10c, 11, and 12.) | | | | | | |
| | - | o organization's f | first seeped third | fourth or fifth toy | Voor on a continu | | L |
| 14 | First 5 years. If the Form 990 is for the | · · | | • | - | | .ion, |
| 200 | check this box and stop here | | arcentage | | | | |
| | Public support percentage for 2020 (li | | | oolumn (f)) | | 15 | |
| | | | | | | | 9 |
| | Public support percentage from 2019 etion D. Computation of Inves | | | | | 16 | (|
| | | | <u>~</u> _ | | | 147 | |
| | Investment income percentage for 202 | | | | | | |
| | Investment income percentage from 2 | | | | | 18 | 47: |
| 198 | 33 1/3% support tests - 2020. If the | | | | | | 17 IS not |
| | more than 33 1/3%, check this box an | | | | | | |
| b | 33 1/3% support tests - 2019. If the | • | | | · | • | |
| | line 18 is not more than 33 1/3%, chec | | | | | | |
| 20 | Private foundation. If the organization | n did not check a | a box on line 14, 19 | a, or 19b, check t | his box and see i | nstructions | ▶∟ |

032023 01-25-21

Part IV | Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- **3a** Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.
- **b** Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- **4a** Was any supported organization not organized in the United States ("foreign supported organization")? *If* "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.
- **b** Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- **b** Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI.
- **b** Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in **Part VI**.
- c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.
 - **b** Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

| | Yes | No |
|-----|-----|----|
| | | |
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| 10a | | |
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| 10b | | |

| Pa | t IV | Supporting Organizations (continued) | | | |
|------------|----------|---|----------|------|-----|
| | | | | Yes | No |
| 11 | Has th | ne organization accepted a gift or contribution from any of the following persons? | | | |
| а | A pers | son who directly or indirectly controls, either alone or together with persons described in lines 11b and | | | |
| | 11c b | elow, the governing body of a supported organization? | 11a | | |
| b | A fam | ily member of a person described in line 11a above? | 11b | | |
| С | A 35% | 6 controlled entity of a person described in line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide | | | |
| | | in Part VI. | 11c | | |
| Sec | tion E | 3. Type I Supporting Organizations | | | |
| | | | | Yes | No |
| 1 | | e governing body, members of the governing body, officers acting in their official capacity, or membership of one or | | | |
| | | supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, ors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) | | | |
| | | ively operated, supervised, or controlled the organization's activities. If the organization had more than one supported | | | |
| | _ | zation, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the | | | |
| _ | | orted organizations and what conditions or restrictions, if any, applied to such powers during the tax year. | 1 | | |
| 2 | | e organization operate for the benefit of any supported organization other than the supported | | | |
| | • | ization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in | | | |
| | | I how providing such benefit carried out the purposes of the supported organization(s) that operated, | 0 | | |
| Sec | | vised, or controlled the supporting organization. C. Type II Supporting Organizations | 2 | | |
| - | | 7. Type it supporting organizations | | Yes | No |
| 1 | Were | a majority of the organization's directors or trustees during the tax year also a majority of the directors | | 163 | 140 |
| • | | stees of each of the organization's supported organization(s)? If "No," describe in Part VI how control | | | |
| | | nagement of the supporting organization was vested in the same persons that controlled or managed | | | |
| | | pported organization(s). | 1 | | |
| Sec | | D. All Type III Supporting Organizations | - | | |
| | | | | Yes | No |
| 1 | Did th | e organization provide to each of its supported organizations, by the last day of the fifth month of the | | | |
| | organi | ization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax | | | |
| | year, (| ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the | | | |
| | organi | ization's governing documents in effect on the date of notification, to the extent not previously provided? | 1 | | |
| 2 | Were | any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported | | | |
| | organi | ization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how | | | |
| | | ganization maintained a close and continuous working relationship with the supported organization(s). | 2 | | |
| 3 | • | ason of the relationship described in line 2, above, did the organization's supported organizations have a | | | |
| | • | cant voice in the organization's investment policies and in directing the use of the organization's | | | |
| | | e or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's | | | |
| <u>Sac</u> | | rted organizations played in this regard. Type III Functionally Integrated Supporting Organizations | 3 | | |
| 1 | | the box next to the method that the organization used to satisfy the Integral Part Test during the yea(see instructions) | | | |
| ' a | | The organization satisfied the Activities Test. Complete line 2 below. | • | | |
| b | | The organization is the parent of each of its supported organizations. <i>Complete line 3 below.</i> | | | |
| c | | The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see in | structio | ns). | |
| 2 | | ies Test. Answer lines 2a and 2b below. | | Yes | No |
| а | Did su | obstantially all of the organization's activities during the tax year directly further the exempt purposes of | | | |
| | the su | pported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify | | | |
| | those | supported organizations and explain how these activities directly furthered their exempt purposes, | | | |
| | how th | ne organization was responsive to those supported organizations, and how the organization determined | | | |
| | that th | nese activities constituted substantially all of its activities. | 2a | | |
| b | Did th | e activities described in line 2a, above, constitute activities that, but for the organization's involvement, | | | |
| | | more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in | | | |
| | | Ithe reasons for the organization's position that its supported organization(s) would have engaged in | | | |
| | | activities but for the organization's involvement. | 2b | | |
| 3 | | t of Supported Organizations. Answer lines 3a and 3b below. | | | |
| а | | e organization have the power to regularly appoint or elect a majority of the officers, directors, or | | | |
| | | es of each of the supported organizations? If "Yes" or "No" provide details in Part VI. | 3a | | |
| b | | e organization exercise a substantial degree of direction over the policies, programs, and activities of each | O.L. | | |
| | OI ITS S | supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard. | 3b | | |

032025 01-25-21

| Pa | rt V Type III Non-Functionally Integrated 509(a)(3) Support | ing Orga | nizations | |
|------|--|--------------|------------------------------|--------------------------------|
| 1 | Check here if the organization satisfied the Integral Part Test as a qualify | ing trust or | n Nov. 20, 1970 (explain in | Part VI). See instructions. |
| | All other Type III non-functionally integrated supporting organizations mu | st complet | te Sections A through E. | |
| Sect | ion A - Adjusted Net Income | | (A) Prior Year | (B) Current Year (optional) |
| 1 | Net short-term capital gain | 1 | | |
| 2 | Recoveries of prior-year distributions | 2 | | |
| 3 | Other gross income (see instructions) | 3 | | |
| 4 | Add lines 1 through 3. | 4 | | |
| 5 | Depreciation and depletion | 5 | | |
| 6 | Portion of operating expenses paid or incurred for production or | | | |
| | collection of gross income or for management, conservation, or | | | |
| | maintenance of property held for production of income (see instructions) | 6 | | |
| 7 | Other expenses (see instructions) | 7 | | |
| 8 | Adjusted Net Income (subtract lines 5, 6, and 7 from line 4) | 8 | | |
| Sect | ion B - Minimum Asset Amount | | (A) Prior Year | (B) Current Year (optional) |
| 1 | Aggregate fair market value of all non-exempt-use assets (see | | | |
| | instructions for short tax year or assets held for part of year): | | | |
| а | Average monthly value of securities | 1a | | |
| b | Average monthly cash balances | 1b | | |
| С | Fair market value of other non-exempt-use assets | 1c | | |
| d | Total (add lines 1a, 1b, and 1c) | 1d | | |
| е | Discount claimed for blockage or other factors | | | |
| | (explain in detail in Part VI): | | | |
| 2 | Acquisition indebtedness applicable to non-exempt-use assets | 2 | | |
| 3 | Subtract line 2 from line 1d. | 3 | | |
| 4 | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, | | | |
| | see instructions). | 4 | | |
| 5 | Net value of non-exempt-use assets (subtract line 4 from line 3) | 5 | | |
| 6 | Multiply line 5 by 0.035. | 6 | | |
| 7 | Recoveries of prior-year distributions | 7 | | |
| 8 | Minimum Asset Amount (add line 7 to line 6) | 8 | | |
| Sect | ion C - Distributable Amount | | | Current Year |
| 1 | Adjusted net income for prior year (from Section A, line 8, column A) | 1 | | |
| 2 | Enter 0.85 of line 1. | 2 | | |
| 3 | Minimum asset amount for prior year (from Section B, line 8, column A) | 3 | | |
| 4 | Enter greater of line 2 or line 3. | 4 | | |
| 5 | Income tax imposed in prior year | 5 | | |
| 6 | Distributable Amount. Subtract line 5 from line 4, unless subject to | | | |
| | emergency temporary reduction (see instructions). | 6 | | |
| 7 | Check here if the current year is the organization's first as a non-function | ally integra | ated Type III supporting org | anization (see |

Schedule A (Form 990 or 990-EZ) 2020

instructions).

| Par | t v Type III Non-Functionally Integrated 509 | (a)(3) Supporting Orga | anizations _{(continu} | ed) | |
|-------|---|-----------------------------------|---------------------------------------|-----|---|
| Secti | on D - Distributions | | | | Current Year |
| 1 | Amounts paid to supported organizations to accomplish exe | | | | |
| 2 | Amounts paid to perform activity that directly furthers exemp | | | | |
| | organizations, in excess of income from activity | 2 | | | |
| 3 | Administrative expenses paid to accomplish exempt purpose | es of supported organization | ns | 3 | |
| 4 | Amounts paid to acquire exempt-use assets | | | 4 | |
| 5 | Qualified set-aside amounts (prior IRS approval required - pro | ovide details in Part VI) | | 5 | |
| 6 | Other distributions (describe in Part VI). See instructions. | | | 6 | |
| 7 | Total annual distributions. Add lines 1 through 6. | | | 7 | |
| 8 | Distributions to attentive supported organizations to which the | he organization is responsive | Э | | |
| | (provide details in Part VI). See instructions. | | | 8 | |
| 9 | Distributable amount for 2020 from Section C, line 6 | | | 9 | |
| 10 | Line 8 amount divided by line 9 amount | | | 10 | |
| Secti | on E - Distribution Allocations (see instructions) | (i) Excess Distributions | (ii) Underdistribution Pre-2020 | s | (iii) Distributable Amount for 2020 |
| 1 | Distributable amount for 2020 from Section C, line 6 | | | | |
| 2 | Underdistributions, if any, for years prior to 2020 (reason- | | | | |
| | able cause required - explain in Part VI). See instructions. | | | | |
| 3 | Excess distributions carryover, if any, to 2020 | | | | |
| а | From 2015 | | | | |
| b | From 2016 | | | | |
| С | From 2017 | | | | |
| d | From 2018 | | | | |
| е | From 2019 | | | | |
| f | Total of lines 3a through 3e | | | | |
| g | Applied to underdistributions of prior years | | | | |
| h | Applied to 2020 distributable amount | | | | |
| i_ | Carryover from 2015 not applied (see instructions) | | | | |
| j | Remainder. Subtract lines 3g, 3h, and 3i from line 3f. | | | | |
| 4 | Distributions for 2020 from Section D, | | | | |
| | line 7: \$ | | | | |
| а | Applied to underdistributions of prior years | | | | |
| b | Applied to 2020 distributable amount | | | | |
| С | Remainder. Subtract lines 4a and 4b from line 4. | | | | |
| 5 | Remaining underdistributions for years prior to 2020, if | | | | |
| | any. Subtract lines 3g and 4a from line 2. For result greater | | | | |
| | than zero, explain in Part VI. See instructions. | | | | |
| 6 | Remaining underdistributions for 2020. Subtract lines 3h | | | | |
| | and 4b from line 1. For result greater than zero, explain in | | | | |
| | Part VI. See instructions. | | | | |
| 7 | Excess distributions carryover to 2021. Add lines 3j | | | | |
| | and 4c. | | | | |
| 8 | Breakdown of line 7: | | | | |
| а | Excess from 2016 | | | | |
| b | Excess from 2017 | | | | |
| С | Excess from 2018 | | | | |
| d | Excess from 2019 | | | | |
| е | Excess from 2020 | | | | |

Schedule A (Form 990 or 990-EZ) 2020

METROPOLITAN BOSTON HOUSING PARTNERSHIP

| Schedule A | (Form 990 or 990-E | Z) 2020 | INC. | D/B/A | METRO | HOUSING | BOSTON | 04-2775991 Page 8 |
|------------|---|-------------------------------------|---|--|---|--|---|---|
| Part VI | Supplemental Part IV, Section A, line 1; Part IV, Sec | Inform lines 1, 2 tion D, lir | nation. 2, 3b, 3c, nes 2 and | Provide the 4b, 4c, 5a, 13; Part IV, 5 | explanations 6, 9a, 9b, 9c, Section E, line | required by Pa 11a, 11b, and es 1c, 2a, 2b, 3a | rt II, line 10; Part II, line 11c; Part IV, Section B, | 17a or 17b; Part III, line 12; lines 1 and 2; Part IV, Section C, Part V, Section B, line 1e; Part V, |
| | (See instructions.) | | , | , | | | | |
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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.

2020

OMB No. 1545-0047

Name of the organization

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number

04 - 2775991

| Organization type (check one): | | | | | | |
|--------------------------------|---|---|--|--|--|--|
| Filers of | : | Section: | | | | |
| Form 990 | or 990-EZ | X 501(c)(3) (enter number) organization | | | | |
| | | 4947(a)(1) nonexempt charitable trust not treated as a private foundation | | | | |
| | | 527 political organization | | | | |
| Form 990 |)-PF | 501(c)(3) exempt private foundation | | | | |
| | | 4947(a)(1) nonexempt charitable trust treated as a private foundation | | | | |
| | | 501(c)(3) taxable private foundation | | | | |
| | nly a section 501(c)(| covered by the General Rule or a Special Rule. 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. | | | | |
| | • | filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions. | | | | |
| Special | Rules | | | | | |
| X | sections 509(a)(1) a any one contributor | described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 r, 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; line 1. Complete Parts I and II. | | | | |
| | contributor, during literary, or educatio | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, nal purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering instead of the contributor name and address), II, and III. | | | | |
| | year, contributions is checked, enter he purpose. Don't com | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., applete any of the parts unless the General Rule applies to this organization because it received nonexclusively etc., contributions totaling \$5,000 or more during the year \bigsim \frac{\text{\$\circ}}{\text{\$\circ}}\$ | | | | |
| | | at isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), 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 | | | | |

 $\ \ \, \text{LHA} \ \ \, \text{For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.}$

certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

Employer identification number

| Part I | Contributors (see instructions). Use duplicate copies of Part I if addition | al space is needed. | |
|-------------|---|---------------------------------|--|
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | Type of contribution |
| 1 | MASSACHUSETTS DEPARTMENT OF PUBLIC HEALTH 250 WASHINGTON ST BOSTON, MA 02108-4619 | \$ 85,289. | Person X Payroll |
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | Type of contribution |
| 2 | FOOTE-RICHARDS FAMILY FOUNDATION 75 ARLINGTON ST FL 10 BOSTON, MA 02116-3936 | \$100,000. | Person X Payroll Noncash (Complete Part II for noncash contributions.) |
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | Type of contribution |
| 3 | BETH ISRAEL DEACONESS MEDICAL CENTER 330 BROOKLINE AVE BOSTON, MA 02215-5491 | \$ 50,000. | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 4 | CLIPPER SHIP FOUNDATION, INC. 2 LIBERTY SQ STE 500 BOSTON, MA 02109-4884 | \$ 75,000. | Person X Payroll |
| (a) | (b) | (c) | (d) |
| No. 5 | Name, address, and ZIP + 4 BLUE CROSS BLUE SHIELD OF MASSACHUSETTS FOUNDATION 101 HUNTINGTON AVE STE 1300 BOSTON, MA 02199-7611 | Total contributions \$ 75,000. | 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 |
| 6 | TIMOTHY P. MOORE FUND | | Person X |
| | PO BOX 9509 | \$ | Person X Payroll Noncash (Complete Part II for |
| 002450 11 0 | WARWICK, RI 02889-0509 | | noncash contributions.) |

Employer identification number

| Part I | Contributors (see instructions). Use duplicate copies of Part I if additional | Il space is needed. | |
|------------|---|----------------------------|--|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 7 | CAMBRIDGE COMMUNITY FOUNDATION 99 BISHOP RICHARD ALLEN DR CAMBRIDGE, MA 02139-3487 | \$ 85,000. | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 8 | BANK OF AMERICA CHARITABLE FOUNDATION, INC. 100 FEDERAL ST FL 8 BOSTON, MA 02110-1898 | \$\$ | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 9 | PATRICK J. MCGOVERN FOUNDATION P.O. BOX 171536 BOSTON, MA 02117-3375 | \$\$ | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 10 | KBK FOUNDATION C/O HOLLAND & HART LLP 555 17TH ST STE 3200 DENVER, CO 80202-3921 | \$ 50,000. | 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 |
| 11 | MABEL LOUISE RILEY FOUNDATION 2 LIBERTY SQ STE 500 BOSTON, MA 02109-4884 | \$50,000. | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 12 | SANTANDER BANK FOUNDATION 75 STATE STREET, 4TH FLOOR, MA1-SST-04-07 BOSTON, MA 02109 | \$ 50,000. | Person X Payroll |

Employer identification number

| Parti | 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 | | | |
| 13 | UNITED WAY OF MASSACHUSETTS BAY AND MERRIMACK VALLEY 9 CHANNEL CTR ST STE 500 BOSTON, MA 02210-3429 | \$ 43,900. | Person X Payroll | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | |
| 14 | THE NEIGHBORHOOD DEVELOPERS 4 GERRISH AVE CHELSEA, MA 02150-2907 | \$\$ | Person X Payroll | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution | | | |
| 15 | MBHP OFFICE CORPORATION 1411 TREMONT STREET BOSTON, MA 02120 | \$ 274,281. | Person X Payroll | | | |
| (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.) | | | |

Employer identification number

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

Employer identification number

| Part III | Exclusively religious, charitable, etc., contribut | ions to organizations described in | section 50 | 11(c)(7), (8), or (10) that total more than \$1,000 for the year | | |
|---------------------------|--|--------------------------------------|--|--|--|--|
| | from any one contributor. Complete columns (a) completing Part III, enter the total of exclusively religious, or | through (e) and the following line e | entry. For org | ganizations e year. /Enter this info once) \$ | | |
| | Use duplicate copies of Part III if additional | space is needed. | . 1000 | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | | (d) Description of how gift is held | | |
| | | | | | | |
| | | | | | | |
| | | (e) Transfer of g | ift | | | |
| | Transferee's name, address, ar | nd ZIP + 4 | Re | lationship of transferor to transferee | | |
| (a) No | | | | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | | (d) Description of how gift is held | | |
| | | | | | | |
| - | | (e) Transfer of g | ift | | | |
| | Transferee's name, address, ar | nd 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 g | - Af nift | | | |
| | Transferee's name, address, ar | | | lationship of transferor to transferee | | |
| | | | | | | |
| | | | | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | | (d) Description of how gift is held | | |
| | | | | | | |
| - | | ift | | | | |
| | Transferee's name, address, ar | | | lationship of transferor to transferee | | |
| | | | | | | |
| | | | | | | |

SCHEDULE C

(Form 990 or 990-EZ)

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527 Complete if the organization is described below. Attach to Form 990 or Form 990-EZ. ► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Open to Public Inspection

Department of the Treasury Internal Revenue Service

If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (See separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (See separate instructions), then

| Name of org | anization $\mathbf{MFTD} \cap \mathbf{D} \cap$ | LITAN BOSTON HOU | ICTNC DADWNEI | OCUTD Emn | loyer identification number |
|--|---|---|---|---|---|
| ivallie of org | | B/A METRO HOUSIN | | VOILTE Fuib | 04-2775991 |
| Part I-A | | ganization is exempt un | | or is a section 527 c | |
| 1 Provide2 Politica | e a description of the organiz | zation's direct and indirect politi ures gn activities | cal campaign activities i | n Part IV. ▶ \$ | |
| Part I-B | Complete if the org | janization is exempt und | der section 501(c)(| (3). | |
| 1 Enter th | ne amount of any excise tax | incurred by the organization un | der section 4955 | ▶\$ | } |
| 2 Enter th | ne amount of any excise tax | incurred by organization manag | gers under section 4955 | ▶\$ | 3 |
| 3 If the or | rganization incurred a sectio | n 4955 tax, did it file Form 4720 | o for this year? | | Yes No |
| 4a Was a | correction made? | | | | Yes No |
| b If "Yes, | " describe in Part IV. | | | | |
| Part I-C | Complete if the org | ganization is exempt und | der section 501(c), | <u> </u> | . , , , |
| 1 Enter th | ne amount directly expended | d by the filing organization for se | ection 527 exempt funct | tion activities > \$ | <u> </u> |
| 2 Enter th | ne amount of the filing organ | ization's funds contributed to o | ther organizations for se | ection 527 | |
| | | | | | S |
| | | s. Add lines 1 and 2. Enter here | | | |
| line 17k |) | | | | S |
| | | 1120-POL for this year? | | | |
| made p | payments. For each organiza utions received that were pr | nployer identification number (E tion listed, enter the amount pa omptly and directly delivered to additional space is needed, pro | id from the filing organize a separate political orga | cation's funds. Also enter the anization, such as a separa | ne amount of political |
| | (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds. If none, enter -0 | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0 |
| | | | | | |
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For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990 or 990-EZ) 2020

LHA

032041 12-02-20

METROPOLITAN BOSTON HOUSING PARTNERSHIP

| Schedule C (Form 990 or 990-EZ) 2020 | | | | | | 2775991 | |
|--|----------------------------|---------------|------------------------------------|---------------------------|--|-----------------------|--------|
| Part II-A Complete if the org | ganizatio | n is exe | mpt under sectio | n 501(c)(3) and fi | led Form 5768 (e | lection un | der |
| section 501(h)). | | | | | | | |
| A Check ► if the filing organiza | ation belong | ıs to an affi | liated group (and list ir | n Part IV each affiliated | l group member's nar | ne, address, E | ΞIN, |
| expenses, and sha | re of excess | s lobbying | expenditures). | | | | |
| B Check ▶ ☐ if the filing organiza | ation checke | ed box A ar | nd "limited control" pro | ovisions apply. | | | |
| | its on Lobb ditures" me | | nditures ınts paid or incurred. |) | (a) Filing organization's totals | (b) Affiliated totals | • |
| 1a Total lobbying expenditures to influ | uence publi | ic opinion (| grassroots lobbying) | | | | |
| b Total lobbying expenditures to infl | | | | | | | |
| c Total lobbying expenditures (add I | | | | | | | |
| d Other exempt purpose expenditure | | | | | | | |
| e Total exempt purpose expenditure | | | | | | | |
| f Lobbying nontaxable amount. Enter | | | | | | | |
| If the amount on line 1e, column (a) o | | | bying nontaxable am | | | | |
| Not over \$500,000 | | 20% of | the amount on line 1e. | | | | |
| Over \$500,000 but not over \$1,00 | 0,000 | \$100,00 | 00 plus 15% of the exc | ess over \$500,000. | | | |
| Over \$1,000,000 but not over \$1,5 | 500,000 | \$175,00 | 00 plus 10% of the exc | ess over \$1,000,000. | | | |
| Over \$1,500,000 but not over \$17 | ,000,000 | \$225,00 | 00 plus 5% of the exce | ess over \$1,500,000. | | | |
| Over \$17,000,000 | | \$1,000, | 000. | | | | |
| | | | | | | | |
| g Grassroots nontaxable amount (er | nter 25% of | line 1f) | | | | | |
| h Subtract line 1g from line 1a. If zer | ro or less, ei | nter -0 | | | | | |
| i Subtract line 1f from line 1c. If zero | o or less, en | nter -0 | | | | | |
| j If there is an amount other than ze | ero on either | r line 1h or | line 1i, did the organiz | ation file Form 4720 | | | |
| reporting section 4911 tax for this | year? | | | | | Yes | └── No |
| | | | eraging Period Under | ` ' | | | |
| (Some organizations t | | | • • | • | of the five columns I | below. | |
| | | | ate instructions for li | | | | |
| | Lobb | ying Expe | nditures During 4-Yea | ar Averaging Period | | | |
| Calendar year (or fiscal year beginning in) | (a) 2 | 017 | (b) 2018 | (c) 2019 | (d) 2020 | (e) To | tal |
| 2a Lobbying nontaxable amount | | | | | | | |
| b Lobbying ceiling amount | | | | | | | |
| (150% of line 2a, column(e)) | | | | | | _ | |
| c Total lobbying expenditures | | | | | | | |
| d Grassroots nontaxable amount | | | | | | | |
| e Grassroots ceiling amount | | | | | | | |
| (150% of line 2d, column (e)) | | | | | | - | |
| | | | l | l | | | |

Schedule C (Form 990 or 990-EZ) 2020

f Grassroots lobbying expenditures

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

| For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description | (a | a) | (b) | |
|--|--------------------|--------------|--------------|---------|
| of the lobbying activity. | Yes | No | Amo | ount |
| 1 During the year, did the filing organization attempt to influence foreign, national, state, or | | | | |
| local legislation, including any attempt to influence public opinion on a legislative matter | | | | |
| or referendum, through the use of: | | | | |
| a Volunteers? | | X | | |
| b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? | | | | |
| c Media advertisements? | | X | | |
| d Mailings to members, legislators, or the public? | | X | | |
| e Publications, or published or broadcast statements? | | X | | |
| f Grants to other organizations for lobbying purposes? | 77 | X | 1, | 1 122 |
| g Direct contact with legislators, their staffs, government officials, or a legislative body? | | 77 | 14 | 2,233. |
| h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? | · X | X | | 206 |
| i Other activities? | | | 1. | 296. |
| j Total. Add lines 1c through 1i | | X | 14 | 2,529. |
| 2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? | | Λ | | |
| b If "Yes," enter the amount of any tax incurred under section 4912 | | | | |
| c If "Yes," enter the amount of any tax incurred by organization managers under section 4912 | | | | |
| d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? Part III-A Complete if the organization is exempt under section 501(c)(4), sec | . tion 501(c) | (5) or se | ction | |
| 501(c)(6). | 11011 30 1(0) | (5), 01 36 | Cuon | |
| | | | Yes | No |
| 1 Were substantially all (90% or more) dues received nondeductible by members? | | 1 | | |
| 2 Did the organization make only in-house lobbying expenditures of \$2,000 or less? | | 2 | | |
| 3 Did the organization agree to carry over lobbying and political campaign activity expenditures from Part III-B Complete if the organization is exempt under section 501(c)(4), sec | | | | |
| 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered answered "Yes." | | | : III-A, lin | e 3, is |
| Dues, assessments and similar amounts from members Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of pol | | | | |
| expenses for which the section 527(f) tax was paid). | iticai | | | |
| a Current year | | 2a | | |
| b Carryover from last year | | | | |
| c Total | | | | |
| 3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues | | | | |
| 4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the | | | | |
| does the organization agree to carryover to the reasonable estimate of nondeductible lobbying an | | | | |
| expenditure next year? | • | 4 | | |
| 5 Taxable amount of lobbying and political expenditures (See instructions) | | 5 | | |
| Part IV Supplemental Information | | | | |
| Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated gro | up list); Part I | I-A, lines 1 | and 2 (See | |
| instructions); and Part II-B, line 1. Also, complete this part for any additional information. PART II-B, LINE 1, LOBBYING ACTIVITIES: | | | | |
| DIRECTOR OF POLICY MET WITH LEGISLATORS AND THEIR ST | AFF TO | DISCU | ss | |
| | | | | |
| PENDING LEGISLATION AND HOUSING POLICY. | | | | |
| | | | | |
| | | | | |
| | | | | |

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

► Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

► Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Open to Public Inspection

Name of the organization

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number 04 - 2775991

| Par | t I Organizations Maintaining Donor Advise | ed Funds or Other Similar Funds o | r Accounts.Complete if the |
|-----|--|---|--|
| | organization answered "Yes" on Form 990, Part IV, lir | ne 6. | |
| | | (a) Donor advised funds | (b) Funds and other accounts |
| 1 | Total number at end of year | | |
| 2 | Aggregate value of contributions to (during year) | | |
| 3 | Aggregate value of grants from (during year) | | |
| 4 | Aggregate value at end of year | | |
| 5 | Did the organization inform all donors and donor advisors in | writing that the assets held in donor advised | funds |
| | are the organization's property, subject to the organization's | exclusive legal control? | Yes No |
| 6 | Did the organization inform all grantees, donors, and donor | advisors in writing that grant funds can be us | ed only |
| | for charitable purposes and not for the benefit of the donor | or donor advisor, or for any other purpose co | nferring |
| | | | |
| Par | t II Conservation Easements. Complete if the or | ganization answered "Yes" on Form 990, Par | t IV, line 7. |
| 1 | Purpose(s) of conservation easements held by the organization | tion (check all that apply). | |
| | Preservation of land for public use (for example, recreated | ation or education) $igsqcup igsqcup $ Preservation of a h | nistorically important land area |
| | Protection of natural habitat | Preservation of a c | certified historic structure |
| | Preservation of open space | | |
| 2 | Complete lines 2a through 2d if the organization held a qual | ified conservation contribution in the form of | |
| | day of the tax year. | | Held at the End of the Tax Year |
| | Total number of conservation easements | | |
| | Total acreage restricted by conservation easements | | *** |
| | Number of conservation easements on a certified historic st | | |
| d | Number of conservation easements included in (c) acquired | | |
| | listed in the National Register | | |
| 3 | Number of conservation easements modified, transferred, re | eleased, extinguished, or terminated by the or | rganization during the tax |
| | year ▶ | | |
| 4 | Number of states where property subject to conservation ea | | |
| 5 | Does the organization have a written policy regarding the pe | | |
| _ | violations, and enforcement of the conservation easements | | |
| 6 | Staff and volunteer hours devoted to monitoring, inspecting | , handling of violations, and enforcing conser | vation easements during the year |
| - | | allian and a talanta and a safe and a safe and a safe and a | and the second s |
| 7 | Amount of expenses incurred in monitoring, inspecting, han | dling of violations, and enforcing conservation | n easements during the year |
| _ | ▶ \$ Does each conservation easement reported on line 2(d) abo | a a tia fir the area with a section 170/b) | (4)(D)(:) |
| 8 | | | |
| 9 | and section 170(h)(4)(B)(ii)? | | |
| 9 | balance sheet, and include, if applicable, the text of the foot | • | |
| | organization's accounting for conservation easements. | Thole to the organization's illiancial statement | is that describes the |
| Par | t III Organizations Maintaining Collections of | of Art. Historical Treasures. or Oth | er Similar Assets. |
| | Complete if the organization answered "Yes" on Forn | | |
| 1a | If the organization elected, as permitted under FASB ASC 9 | | I balance sheet works |
| | of art, historical treasures, or other similar assets held for pu | · | |
| | service, provide in Part XIII the text of the footnote to its fina | · · · · · · · · · · · · · · · · · · · | • |
| b | If the organization elected, as permitted under FASB ASC 9 | | |
| | art, historical treasures, or other similar assets held for publi | | |
| | provide the following amounts relating to these items: | , , , | , |
| | (i) Revenue included on Form 990, Part VIII, line 1 | | > \$ |
| | (ii) Assets included in Form 990, Part X | | |
| 2 | If the organization received or held works of art, historical tre | | |
| | the following amounts required to be reported under FASB | - | • |
| а | Revenue included on Form 990, Part VIII, line 1 | | > \$ |
| | Assets included in Form 990, Part X | | |
| | For Paperwork Reduction Act Notice, see the Instruction | | Schedule D (Form 990) 2020 |

032051 12-01-20

| | t III Organizations Maintaining C | ollections of A | rt, His | torical Tr | easures, | or Othe | r Similar As | sets(continued) |) |
|------|---|-----------------------|-----------|----------------|----------------|---------------|------------------|--------------------|--------|
| 3 | Using the organization's acquisition, accession | on, and other record | ls, chec | k any of the | following that | at make si | gnificant use o | f its | |
| | collection items (check all that apply): | | | | | | | | |
| а | Public exhibition | d | | Loan or exc | hange progr | am | | | |
| b | Scholarly research | е | | | | | | | |
| С | Preservation for future generations | | | | | | | | |
| 4 | Provide a description of the organization's co | ollections and explai | n how th | nev further t | he organizat | ion's exem | npt purpose in | Part XIII. | |
| 5 | During the year, did the organization solicit or | | | | | | | | |
| | to be sold to raise funds rather than to be ma | | | | | | | Yes | □No |
| Pai | t IV Escrow and Custodial Arran | | | | | | | IV, line 9, or | |
| | reported an amount on Form 990, Par | t X, line 21. | | | | | | | |
| 1a | Is the organization an agent, trustee, custodi | an or other intermed | diary for | contribution | ns or other as | sets not i | ncluded | | |
| | on Form 990, Part X? | | | | | | | Yes | □No |
| b | If "Yes," explain the arrangement in Part XIII | | | | | | | | |
| | | | | | | | | Amount | |
| С | Beginning balance | | | | | | 1c | | |
| | Additions during the year | | | | | | | | |
| | Distributions during the year | | | | | | | | |
| f | Ending balance | | | | | | | | |
| 2a | Did the organization include an amount on Fo | | | | | | | Yes | No |
| b | If "Yes," explain the arrangement in Part XIII. | Check here if the ex | kplanatio | on has been | n provided or | Part XIII | | | |
| Pai | t V Endowment Funds. Complete if | the organization an | swered | "Yes" on Fo | orm 990, Par | t IV, line 10 | 0. | | |
| | | (a) Current year | (b) F | rior year | (c) Two yea | rs back (d | d) Three years b | ack (e) Four years | s back |
| 1a | Beginning of year balance | | | | | | | | |
| b | Contributions | | | | | | | | |
| С | Net investment earnings, gains, and losses | | | | | | | | |
| d | Grants or scholarships | | | | | | | | |
| | Other expenditures for facilities | | | | | | | | |
| | and programs | | | | | | | | |
| f | Administrative expenses | | | | | | | | |
| | End of year balance | | | | | | | | |
| 2 | Provide the estimated percentage of the curr | ent year end baland | e (line 1 | g, column (a | a)) held as: | | | | |
| а | Board designated or quasi-endowment | | % | | | | | | |
| b | Permanent endowment | % | _ | | | | | | |
| С | Term endowment | / 6 | | | | | | | |
| | The percentages on lines 2a, 2b, and 2c show | uld equal 100%. | | | | | | | |
| За | Are there endowment funds not in the posse | ssion of the organiz | ation tha | at are held a | and administe | ered for the | e organization | | |
| | by: | | | | | | | Yes | No |
| | (i) Unrelated organizations | | | | | | | 3a(i) | |
| | (ii) Related organizations | | | | | | | | |
| b | If "Yes" on line 3a(ii), are the related organiza | tions listed as requi | red on S | Schedule R? | | | | 3b | |
| 4 | Describe in Part XIII the intended uses of the | organization's endo | wment | funds. | | | | • | |
| Pai | t VI Land, Buildings, and Equipm | ent. | | | | | | | |
| | Complete if the organization answered | d "Yes" on Form 990 |), Part I | /, line 11a. S | See Form 99 | D, Part X, I | ine 10. | | |
| | Description of property | (a) Cost or o | ther | (b) Cost | t or other | (c) Acc | cumulated | (d) Book valu | ue |
| | | basis (investr | nent) | basis | (other) | depi | reciation | | |
| 1a | Land | | | | | | | | |
| | Buildings | | | | | | | | |
| | Leasehold improvements | | | | | | | | |
| d | Equipment | | | 93 | 6,026. | 2 | 98,079. | 637,9 | 47. |
| е | Other | | | | · · · | | | | |
| Tota | . Add lines 1a through 1e. (Column (d) must ed | gual Form 990, Part | X, colur | nn (B), line | 10c.) | | • | 637,9 | 947. |

Schedule D (Form 990) 2020

| T110 D /D / 1 1 | | SING PARTNERSHIP | 0775001 |
|---|----------------------------|--|----------------------------|
| Part VII Investments - Other Securities. | METRO HOUSING | 3 BOSTON U4- | -2775991 _{Page} : |
| | on Form 000 Dort IV lin | a 11b. Can Form 000. Dort V. line 10 | |
| Complete if the organization answered "Yes" ((a) Description of security or category (including name of security) | (b) Book value | (c) Method of valuation: Cost or end- | of-vear market value |
| (0.5) | (b) Book value | (c) Welfied of Valuation. Cost of Cha | or year market value |
| (1) Financial derivatives | | | |
| (2) Closely held equity interests (3) Other | | | |
| (A) | | | |
| (B) | | | |
| (C) | | | |
| (D) | | | |
| (E) | | | |
| (F) | | | |
| (G) | | | |
| (H) | | | |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) | | | |
| Part VIII Investments - Program Related. | | | |
| Complete if the organization answered "Yes" of | on Form 990 Part IV line | a 11c See Form 990 Part V line 13 | |
| (a) Description of investment | (b) Book value | (c) Method of valuation: Cost or end- | of-vear market value |
| (1) | (2) 20011 141100 | (c) memora or rangament election entitle | or your marries raide |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) | | | |
| Part IX Other Assets. | | | |
| Complete if the organization answered "Yes" of | on Form 990 Part IV line | a 11d. See Form 990. Part X. line 15 | |
| | Description | 114. 556 1 5111 556, 1 4177, 1115 15. | (b) Book value |
| (1) CLIENT DEPOSITS | | | 955,221 |
| (2) RESTRICTED CASH | | | 48,224,768 |
| (3) OTHER INVESTMENTS | | | 68,316 |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line | 15.) | • | 49,248,305 |
| Part X Other Liabilities. | / | | -,, |
| Complete if the organization answered "Yes" of | on Form 990. Part IV. line | e 11e or 11f. See Form 990. Part X. line 25. | |
| 1. (a) Description of liability | | 1 | (b) Book value |
| (1) Federal income taxes | | | |
| (2) CEDAC HOME MODIFICATION LO | DANS | | 9,044,018 |
| (3) CLIENT DEPOSITS | | | 955,221 |
| (A) DEFEDDED DENT DAVARIE | | | 871 671 |

291,019. INTEREST RATE SWAP (5) (6) (7) (8) 11,161,929. Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII... X

Schedule D (Form 990) 2020

| Par | t XI Reconciliation of Revenue per Audited Financial Stat | ements With Rev | enue per Return. | - rago - |
|---------|--|------------------------|--------------------|----------|
| | Complete if the organization answered "Yes" on Form 990, Part IV, line | 12a. | | |
| 1 | Total revenue, gains, and other support per audited financial statements | | 1 | |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | | |
| а | Net unrealized gains (losses) on investments | 2a | | |
| b | Donated services and use of facilities | 2b | | |
| С | Recoveries of prior year grants | 2c | | |
| d | Other (Describe in Part XIII.) | 2d | | |
| е | Add lines 2a through 2d | | 2e | |
| 3 | Subtract line 2e from line 1 | | 3 | |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1: | | | |
| а | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | |
| b | Other (Describe in Part XIII.) | 4b | | |
| С | Add lines 4a and 4b | | | |
| _5_ | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) | | | |
| Pai | rt XII Reconciliation of Expenses per Audited Financial Sta | = | oenses per Return. | |
| | Complete if the organization answered "Yes" on Form 990, Part IV, line | | | |
| 1 | Total expenses and losses per audited financial statements | | 1 | |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | 1 1 | | |
| а | Donated services and use of facilities | | | |
| b | Prior year adjustments | 2b | | |
| С | Other losses | 2c | | |
| d | Other (Describe in Part XIII.) | 2d | | |
| е | Add lines 2a through 2d | | | |
| 3 | Subtract line 2e from line 1 | | 3 | |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1: | 1 1 | | |
| | Investment expenses not included on Form 990, Part VIII, line 7b | | | |
| b | Other (Describe in Part XIII.) | 4b | | |
| С | Add lines 4a and 4b | | | |
| 5 | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18. |) | 5 | |
| | rt XIII Supplemental Information. | | | |
| | de the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; | | | ⊃art XI, |
| lines | 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any | additional information | 1. | |
| | | | | |
| D 3 T | OM V TIME O | | | |
| PAI | RT X, LINE 2: | | | |
| m=== | | AKEN OD EKD | | T31 T31 |
| THE | E ORGANIZATION EVALUATES TAX POSITIONS T | AKEN OR EXP | ECTED TO BE TAK | EN IN |
| T ITT | T MAY DEMINAGE MO DEMEDATAS CHIEMHED MHE O | NAME DOGETHEON | (C. ADE | |
| T.I.5 | S TAX RETURNS TO DETERMINE WHETHER THE T | AX POSITION | S ARE | |
| MOT | THE THE THE TAXABLE OF DELIC CHARACTER OF | , miim vooi to | מסוותוג עגם הזמגו | T (1137 |
| MOI | RE-LIKELY-THAN-NOT OF BEING SUSTAINED BY | THE APPLIC | ABLE TAX AUTHOR | T.I.A • |
| m 2 2 | A DOCUMENTONIC NOW DEEMED WO MEEM WILE MODE | T TIZET V MILAN | NOW WIDEGIOLD | 7 T ONTO |
| TA | K POSITIONS NOT DEEMED TO MEET THE MORE- | TIKELY-LHAN | -NOT THRESHOLD, | ALONG |
| T.7 T F | UI ACCOUED INMEDICAL AND DENALAY MILEDEON | WOLLD DE DE | ICODDED AC AM EX | рамов |
| M T . | TH ACCRUED INTEREST AND PENALTY THEREON | MOOFD BE KE | CORDED AS AN EX | PENSE |
| | MILE GUDDENE VEND EINANGIN GENEMENEG | 3 m TINIT 20 | 0001 mm | |
| TIM | THE CURRENT YEAR FINANCIAL STATEMENTS. | AT JUNE 30 | , ZUZI THE | |
| OD (| CANTERACTON DELTETTES CHIAC TO ITAS NO ITASES | אר ע אר הוא או | CTMTONC WIMITN | 7 NIX OE |
| ORC | GANIZATION BELIEVES THAT IT HAS NO UNCER | CTAIN TAX PO | SITIONS WITHIN | ANY OF |
| TM | CODEN MAY VEADO /2017 2020\ | | | |
| T.1.5 | S OPEN TAX YEARS (2017-2020). | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

METROPOLITAN BOSTON HOUSING PARTNERSHIP 04-277<u>5991 Page 5</u> INC. D/B/A METRO HOUSING BOSTON Schedule D (Form 990) 2020 Part XIII | Supplemental Information (continued)

032055 12-01-20

SCHEDULE G

Department of the Treasury

Internal Revenue Service

(Form 990 or 990-EZ)

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020
Open to Public

Name of the organization

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Inspection
Employer identification number
0.4-2.775991

| | D/II IIDING IIGGDING | | | <u> </u> | 102 2773 | |
|--|--|--|----------|---------------------------------------|--|---|
| Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not | | | | | | |
| required to complete this par | | va ooti | vition | Chook all that apply | | |
| Indicate whether the organization raised funds through any of the following activities. Check all that apply. Mail solicitations E Solicitation of non-government grants | | | | | | |
| b Internet and email solicitations f Solicitation of government grants | | | | | | |
| c Phone solicitations g Special fundraising events | | | | | | |
| d In-person solicitations | | | | | | |
| 2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or | | | | | | |
| key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? | | | | | | |
| b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be | | | | | | |
| compensated at least \$5,000 by the | organization. | | | | | |
| (v) Ar | | | | | | |
| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | (iii) Did fundraiser have custody or control of contributions? | | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
| | | | | | | |
| | | Yes | | | | |
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| otal | | | <u> </u> | | | |
| 3 List all states in which the organization | on is registered or licensed to solicit of | contrib | utions | s or has been notified | d it is exempt from re | egistration |
| or licensing. | | | | | | |
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032081 11-25-20

Schedule G (Form 990 or 990-EZ) 2020

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

| | | le G (Form 990 or 990-EZ) 2020 INC. D/ | | | | 2775991 Page 2 | | | | |
|----------|---|--|----------------------------|------------------------|-----------------------|--|--|--|--|--|
| Pa | rt I | | • | · · | | | | | | |
| | | of fundraising event contributions and gro | | | | ots greater than \$5,000. | | | | |
| | | | (a) Event #1 | (b) Event #2 | (c) Other events NONE | (d) Total events | | | | |
| | | | ANNUAL EVENT | | MONE | (add col. (a) through | | | | |
| | | | (event type) | (event type) | (total number) | col. (c)) | | | | |
| Revenue | | | (3.3 1) [3.5] | (event type) | (10101110111001) | | | | | |
| eve | 1 | Gross receipts | 350,150. | | | 350,150. | | | | |
| Ж | | | | | | | | | | |
| | 2 | Less: Contributions | 276,882. | | | 276,882. | | | | |
| | | | 72 260 | | | 72 260 | | | | |
| _ | 3 | Gross income (line 1 minus line 2) | 73,268. | | | 73,268. | | | | |
| | 4 | Cash prizes | | | | | | | | |
| | 7 | Od311 p1/203 | | | | | | | | |
| | 5 | Noncash prizes | | | | | | | | |
| ses | | | | | | 4,540. | | | | |
| pen | 6 Rent/facility costs 4,540. 7 Food and beverages 12,413. | | | | | | | | | |
| t Ex | _ | | 10 412 | | | 12 412 | | | | |
| irec | 7 | Food and beverages | 12,413. | | | 12,413. | | | | |
| | 8 | Entertainment | 20,000. | | | 20,000. | | | | |
| | 9 | Other direct expenses | 36,315. | | | 20,000. 36,315. | | | | |
| | 10 | | 9 in column (d) | | > | 73,268. | | | | |
| | | Net income summary. Subtract line 10 from li | | | | 0. | | | | |
| Pa | rt I | | answered "Yes" on Form | 990, Part IV, line 19, | or reported more than | | | | | |
| | | \$15,000 on Form 990-EZ, line 6a. | | (b) Pull tabs/instant | | (a) Tatal manaina (a dal | | | | |
| anı | | | (a) Bingo | bingo/progressive bing | (c) Other gaming | (d) Total gaming (add col. (a) through col. (c)) | | | | |
| Revenue | | | | | | ., ., ., | | | | |
| Œ | 1 | Gross revenue | | | | | | | | |
| | | | | | | | | | | |
| es | 2 | Cash prizes | | | | | | | | |
| Expenses | _ | N | | | | | | | | |
| Exp | 3 | Noncash prizes | | | | | | | | |
| Direct | 4 | Rent/facility costs | | | | | | | | |
| Ö | | | | | | | | | | |
| | 5 | Other direct expenses | | | | | | | | |
| | | | Yes % | Yes 9 | % | | | | | |
| | 6 | Volunteer labor | └── No | └── No | No | | | | | |
| | 7 | Direct expense summary. Add lines 2 through | 5 in column (d) | | | | | | | |
| | ′ | bliect expense summary. Add lines 2 through | 15 III Columni (a) | | > | | | | | |
| | 8 | Net gaming income summary. Subtract line 7 | from line 1, column (d) | | > | | | | | |
| | | - | | | | | | | | |
| 9 | | ter the state(s) in which the organization condu | | | | | | | | |
| | | the organization licensed to conduct gaming a | ctivities in each of these | states? | | . Yes No | | | | |
| b | It " | No," explain: | | | | | | | | |
| | _ | | | | | | | | | |
| 10a | We | ere any of the organization's gaming licenses re | evoked, suspended, or te | erminated during the t | ax year? | Yes No | | | | |
| | | Yes," explain: | | | | ··· | | | | |
| | | | | | | | | | | |

Schedule G (Form 990 or 990-EZ) 2020

METROPOLITAN BOSTON HOUSING PARTNERSHIP

| Schedule G (Form 990 or 990-EZ) 2020 INC. D/B/A METRO HOUSING BOSTON 0 | 4-2775991 Page 3 |
|---|--------------------------------|
| 11 Does the organization conduct gaming activities with nonmembers? | Yes No |
| 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed | |
| to administer charitable gaming? | Yes No |
| 13 Indicate the percentage of gaming activity conducted in: | |
| | 13a % |
| a The organization's facility | |
| b An outside facility | |
| 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records | : |
| Name | |
| Address | |
| 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? | Yes No |
| b If "Yes," enter the amount of gaming revenue received by the organization > \$ and the amoun | t |
| of gaming revenue retained by the third party >\$ | |
| c If "Yes," enter name and address of the third party: | |
| , | |
| Name ▶ | |
| | |
| Address | |
| 16 Gaming manager information: | |
| | |
| Name | |
| Gaming manager compensation ▶ \$ | |
| | |
| Description of services provided | |
| | |
| | |
| | |
| Director/officer Employee Independent contractor | |
| independent contractor | |
| 47 Manual above distributions | |
| 17 Mandatory distributions: | |
| a Is the organization required under state law to make charitable distributions from the gaming proceeds to | |
| retain the state gaming license? | Yes No |
| b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in | the |
| organization's own exempt activities during the tax year > \$ | |
| Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and | nd Part III, lines 9, 9b, 10b, |
| 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions. | |
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METROPOLITAN BOSTON HOUSING PARTNERSHIP

| Schedule G | G (Form 990 or 990-EZ) | INC. | D/B/A | METRO | HOUSING | BOSTON | | <u>04-2775991</u> | Page 4 |
|------------|---|-------------|------------|-------|---------|--------|------|--------------------|-----------|
| Part IV | G (Form 990 or 990-EZ) Supplemental In | formation (| continued) | | | | | | |
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032084 04-01-20

SCHEDULE J (Form 990)

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest

Compensated Employees

Complete if the organization answered "Yes" on Form 990, Part IV, line 23. ► Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

Open to Public Inspection

OMB No. 1545-0047

Internal Revenue Service Name of the organization

Questions Regarding Compensation

Department of the Treasury

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number 04 - 2775991

| | | | Yes | No |
|------------|--|----|-----|----|
| 1 a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, | | | |
| | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. | | | |
| | First-class or charter travel Housing allowance or residence for personal use | | | |
| | Travel for companions Payments for business use of personal residence | | | |
| | Tax indemnification and gross-up payments Health or social club dues or initiation fees | | | |
| | Discretionary spending account Personal services (such as maid, chauffeur, chef) | | | |
| | | | | |
| b | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or | | | |
| | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain | 1b | | |
| 2 | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, | | | |
| | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? | 2 | | |
| | | | | |
| 3 | Indicate which, if any, of the following the organization used to establish the compensation of the organization's | | | |
| | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to | | | |
| | establish compensation of the CEO/Executive Director, but explain in Part III. | | | |
| | Compensation committee Written employment contract | | | |
| | Independent compensation consultant Compensation survey or study | | | |
| | Form 990 of other organizations X Approval by the board or compensation committee | | | |
| | | | | |
| 4 | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing | | | |
| | organization or a related organization: | | | 37 |
| а | 1, | 4a | | X |
| | Participate in or receive payment from a supplemental nonqualified retirement plan? | 4b | | X |
| С | Participate in or receive payment from an equity-based compensation arrangement? | 4c | | X |
| | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. | | | |
| | Only 10 15 15 15 15 15 15 15 15 15 15 15 15 15 | | | |
| _ | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9. | | | |
| 5 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation | | | |
| _ | contingent on the revenues of: The organization? | 5a | | х |
| a | The organization? | 5b | | X |
| D | Any related organization? If "Yes" on line 5a or 5b, describe in Part III. | 30 | | |
| 6 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation | | | |
| 6 | contingent on the net earnings of: | | | |
| а | | 6a | | х |
| h | The organization? Any related organization? | 6b | | X |
| | If "Yes" on line 6a or 6b, describe in Part III. | | | == |
| 7 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments | | | |
| • | not described on lines 5 and 6? If "Yes," describe in Part III | 7 | | Х |
| 8 | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the | | | |
| - | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III | 8 | | Х |
| 9 | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in | | | |
| | Regulations section 53.4958-6(c)? | 9 | | |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2020

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| | | (B) Breakdown of | W-2 and/or 1099-MI | SC compensation | (C) Retirement and other deferred | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) |
|---------------------------|------|--------------------------|---|---|-----------------------------------|-------------------------|------------------------------------|---|
| (A) Name and Title | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | compensation | Deficition | (5)(1)-(0) | reported as deferred on prior Form 990 |
| (1) CHRISTOPHER T. NORRIS | (i) | 219,477. | 0. | 0. | 7,260. | 13,494. | 240,231. | 0. |
| PRESIDENT/EXEC. DIRECTOR | (ii) | 0. | 0. | 0. | 0. | 0. | | 0. |
| (2) ANNE ROUSSEAU | (i) | 161,826. | 0. | 0. | 5,217. | 1,147. | 168,190. | 0. |
| TREASURER/CFO | (ii) | 0. | 0. | 0. | 0. | 0. | | 0. |
| (3) SUSAN NOHL | (i) | 149,877. | 0. | 0. | 6,030. | 2,556. | | 0. |
| DEPUTY DIRECTOR | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
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| | (i) | | | | | | | |
| | (ii) | | | | | | | |

Schedule J (Form 990) 2020

| Part III Supplemental Information |
|--|
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
| |
| PART I, LINE 3: |
| THE COMPENSATION OF THE EXECUTIVE DIRECTOR IS SET BY THE ORGANIZATION'S |
| EXECUTIVE COMMITTEE BASED UPON COMPARABLE COMPENSATION DATA FOR THE SAME |
| POSITION FOR ORGANIZATIONS OF SIMILAR SIZE WITHIN THE INDUSTRY. THE |
| DECISION OF THE EXECUTIVE COMMITTEE IS REVIEWED BY THE BOARD OF DIRECTORS |
| PRIOR TO BEING FINALIZED. |
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SCHEDULE K (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Information on Tax-Exempt Bonds

Complete if the organization answered "Yes" on Form 990, Part IV, line 24a. Provide descriptions,

explanations, and any additional information in Part VI.

Attach to Form 990. Go to www.irs.gov/Form990 for instructions and the latest information.

2020
Open to Public Inspection

Name of the organization

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number 04-2775991

| $C \cdot D/D/A$ | MEIKO HOOS | TING POSTO | LN | | | | | | 4-4 | 1113 | <i>33</i> <u>1</u> | | |
|---|---------------------|--|---|--|--|--|--|--|--|--|--|--|--|
| Bond Issues SEE PART VI FOR COLUMN (A | | | | | | | | | | | | | |
| | (b) Issuer EIN | (c) CUSIP# | (d) Date issued | d (e) Issu | ıe price | (f) Descript | ion of purpose | (g) De | feased | | | (i) Po | olec |
| | | | | | | | | | | of is | suer | finan | icing |
| | | | | | | | | Yes | No | Yes | No | Yes | No |
| | | | | | | | | | | | | | |
| ANCE AGEN | 04-3431814 | NONEAVAIL | 07/01/1 | 6 8,500 | ,000.c | CONSTRUC | TION | | X | | Х | | X |
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| art of a refunding | issue of tax-exempt | bonds (or. | 100 | 110 | 100 | 110 | | 110 | + | | | .,, | |
| _ | • | | | Х | | | | | | | | | |
| | | | | | | | | | \top | | | | |
| - | | • |] | Х | | | | | | | | | |
| Has the final allocation of proceeds been made? | | | | Х | | | | | 1 | | | | |
| | | | | | | | | | \top | | | | |
| | | | X | | | | | | | | | | |
| | reased | SEE PART VI (b) Issuer EIN ANCE AGEN 04 – 3431814 Feased Feased Feased Foceeds Foceeds Foceeds Foceeds For coceeds For cocee | SEE PART VI FOR COLUM (b) Issuer EIN (c) CUSIP # ANCE AGEN 0 4 – 3 4 3 1 8 1 4 NONEAVAIL Geased unds beceeds buss ds roceeds s from proceeds roceeds roceeds on art of a refunding issue of tax-exempt bonds (or, rent refunding issue)? art of a refunding issue of taxable bonds (or, if ance refunding issue)? oceeds been made? ain adequate books and records to support the | (b) Issuer EIN (c) CUSIP # (d) Date issued ANCE AGEN 04 – 3431814 NONEAVAIL 07/01/10 Peased 8, 50 ands 9 ands 9 are of a refunding issue of tax-exempt bonds (or, rent refunding issue)? art of a refunding issue of taxable bonds (or, if ance refunding issue)? art of a refunding issue of taxable bonds (or, if ance refunding issue)? oneeds 9 art of a refunding issue of taxable bonds (or, if ance refunding issue)? oneeds 9 one | SEE PART VI FOR COLUMN (A) CONTINUAT (b) Issuer EIN (c) CUSIP# (d) Date issued (e) Issuer EIN (a) Date issued (b) Issuer EIN (c) CUSIP# (d) Date issued (e) Issuer EIN (a) Date issued (e | SEE PART VI FOR COLUMN (A) CONTINUATIONS | SEE PART VI FOR COLUMN (A) CONTINUATIONS | SEE PART VI FOR COLUMN (A) CONTINUATIONS (b) Issuer EIN (c) CUSIP # (d) Date issued (e) Issue price (f) Description of purpose FACILITY ANCE AGEN 04 - 3431814 NONEAVAIL 07/01/16 8,500,000. CONSTRUCTION A B C Eased 8,500,000. Unids 8,500,000. Unids 900 | SEE PART VI FOR COLUMN (A) CONTINUATIONS |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule K (Form 990) 2020

04-2775991

| Pal | rt III Private Business Use | | | | | | | | |
|-----|---|-----|----|-----|----|-----|----|-----|----|
| | | | Ą | E | 3 | (| Ç | |) |
| 1 | Was the organization a partner in a partnership, or a member of an LLC, | Yes | No | Yes | No | Yes | No | Yes | No |
| | which owned property financed by tax-exempt bonds? | | X | | | | | | |
| 2 | Are there any lease arrangements that may result in private business use of | | | | | | | | |
| | bond-financed property? | | X | | | | | | |
| 3a | Are there any management or service contracts that may result in private | | | | | | | | |
| | business use of bond-financed property? | | X | | | | | | |
| b | If "Yes" to line 3a, does the organization routinely engage bond counsel or other outside | | | | | | | | |
| | counsel to review any management or service contracts relating to the financed property? | | | | | | | | |
| C | Are there any research agreements that may result in private business use of | | | | | | | | |
| | bond-financed property? | | X | | | | | | |
| c | If "Yes" to line 3c, does the organization routinely engage bond counsel or other | | | | | | | | |
| | outside counsel to review any research agreements relating to the financed property? | | | | | | | | |
| 4 | Enter the percentage of financed property used in a private business use by entities | | | | | | | | |
| | other than a section 501(c)(3) organization or a state or local government | | % | | % | | % | | % |
| 5 | Enter the percentage of financed property used in a private business use as a | | | | | | | | |
| | result of unrelated trade or business activity carried on by your organization, | | | | | | | | |
| | another section 501(c)(3) organization, or a state or local government | | % | | % | | % | | % |
| 6 | Total of lines 4 and 5 | | % | | % | | % | | % |
| 7 | Does the bond issue meet the private security or payment test? | | X | | | | | | |
| 8a | Has there been a sale or disposition of any of the bond-financed property to a non- | | | | | | | | |
| | governmental person other than a 501(c)(3) organization since the bonds were issued? | | X | | | | | | |
| b | If "Yes" to line 8a, enter the percentage of bond-financed property sold or | | | | | | | | |
| | disposed of | | % | | % | | % | | % |
| c | If "Yes" to line 8a, was any remedial action taken pursuant to Regulations | | | | | | | | |
| | sections 1.141-12 and 1.145-2? | | | | | | | | |
| 9 | Has the organization established written procedures to ensure that all | | | | | | | | |
| | nonqualified bonds of the issue are remediated in accordance with the | | | | | | | | |
| | requirements under Regulations sections 1.141-12 and 1.145-2? | | X | | | | | | |
| Pai | rt IV Arbitrage | | | | | | | | |
| | | | Ą | E | 3 | (| Ç | 1 |) |
| 1 | Has the issuer filed Form 8038-T, Arbitrage Rebate, Yield Reduction and | Yes | No | Yes | No | Yes | No | Yes | No |
| | Penalty in Lieu of Arbitrage Rebate? | | X | | | | | | |
| 2 | If "No" to line 1, did the following apply? | | | | | | | | |
| а | Rebate not due yet? | | X | | | | | | |
| | Exception to rebate? | | Х | | | | | | |
| | No rebate due? | | Х | | | | | | |
| | If "Yes" to line 2c, provide in Part VI the date the rebate computation was | | | | | | | | |
| | performed | | | | | | | | |
| 3 | Is the bond issue a variable rate issue? | X | | | | | | | |
| | | | | | | | | | |

Schedule K (Form 990) 2020

04-2775991

Page 3

| · u | t IV Arbitrage (continued) | | | | | | | | |
|-----|---|------------|----------------|----------------|----|-----|----|-----|----|
| | | | 4 | l l | 3 | | | |) |
| 4a | Has the organization or the governmental issuer entered into a qualified | Yes | No | Yes | No | Yes | No | Yes | No |
| | hedge with respect to the bond issue? | | Х | | | | | | |
| b | Name of provider | | | | | | | | |
| | Term of hedge | | | | | | | | |
| | Was the hedge superintegrated? | | | | | | | | |
| | Was the hedge terminated? | | | | | | | | |
| | Were gross proceeds invested in a guaranteed investment contract (GIC)? | | X | | | | | | |
| b | Name of provider | | | | | | | | |
| | Term of GIC | | | | | | | | |
| d | Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied? | | | | | | | | |
| 6 | Were any gross proceeds invested beyond an available temporary period? | | X | | | | | | |
| 7 | Has the organization established written procedures to monitor the | | | | | | | | |
| | requirements of section 148? | | X | | | | | | |
| Par | t V Procedures To Undertake Corrective Action | | | | | | | | |
| | | | <u> </u> | I | 3 | (| 2 | |) |
| | Has the organization established written procedures to ensure that violations | Yes | No | Yes | No | Yes | No | Yes | No |
| | of federal tax requirements are timely identified and corrected through the | | | | | | | | |
| | voluntary closing agreement program if self-remediation isn't available under | | | | | | | | |
| | applicable regulations? | | X | | | | | | |
| _ | applicable regulations: | | Λ | | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions | on Schedul | | L ructions. | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions HEDULE K, PART I, BOND ISSUES: | | e K. See instr | ructions. | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions | | e K. See instr | L ructions. | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions HEDULE K, PART I, BOND ISSUES: | | e K. See instr | I ructions. | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions HEDULE K, PART I, BOND ISSUES: | | e K. See instr | I ructions. | | | | | |
| | t VI Supplemental Information. Provide additional information for responses to questions HEDULE K, PART I, BOND ISSUES: | | e K. See instr | ructions. | | | | | |
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SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ. ▶ Go to www.irs.gov/Form990 for the latest information. Open to Public

OMB No. 1545-0047

Inspection

Internal Revenue Service Name of the organization

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number 04 - 2775991

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION: SERVICES THAT LEAD FAMILIES AND INDIVIDUALS TO HOUSING STABILITY, ECONOMIC SECURITY, AND AN IMPROVED QUALITY OF LIFE.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS: INCLUDING THE SECTION 8 PROGRAM, ARE: 79.79% UNDER \$30,000, 11% AT \$30,001-\$45,000, 5.6% AT \$45,001-\$60,000, 3.5% OVER \$60,000; AVERAGE ANNUAL INCOME FOR OUR HOUSEHOLDS IS \$16,677. ADDITIONALLY, 67% OF THE HOUSEHOLDS WE SERVE HAVE CHILDREN UNDER THE AGE OF 18, 50% OF THE HEADS OF HOUSEHOLDS WE SERVE ARE PERSONS WITH A DISABILITY AND 26% OF ALL HOUSEHOLDS HAVE A HEAD OF HOUSEHOLD THAT IS ELDERLY. HOUSING SUPPORTS PROGRAMS PROVIDE INNOVATIVE AND PERSONALIZED SOLUTIONS TO ENSURE THAT INDIVIDUALS AND FAMILIES WHO ARE HOMELESS OR MOST AT RISK OF HOMELESSNESS CAN FIND AND SUSTAIN HOUSING.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS: ENSURE THAT OUR SERVICES WERE ACCESSIBLE TO CLIENTS IN ALL COMMUNITIES. IN TOTAL, IN FY 21 STAFF RESPONDED TO MORE THAN 1915 PHONE, EMAIL, AND WALK-IN INQUIRIES. OF THOSE, 252 INDIVIDUALS RECEIVED IN- PERSON BRIEF COUNSELING SERVICES, AND 877 RECEIVED INTENSIVE CASE MANAGEMENT SERVICES

FORM 990, PART VI, SECTION B, LINE 11B:

THE 990 IS PRESENTED TO THE AUDIT COMMITTEE DURING THE PRESENTATION OF THE AUDITED FINANCIAL STATEMENTS. THE FORM 990 IS ALSO DISTRIBUTED TO THE BOARD OF DIRECTORS. AFTER REVIEWING THE 990 AND ALL QUESTIONS HAVE BEEN

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. Schedule O (Form 990 or 990-EZ) 2020

032211 11-20-20

Name of the organization METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Employer identification number 04-2775991

ANSWERED THE RETURN IS ACCEPTED AND APPROVED FOR FILING.

FORM 990, PART VI, SECTION B, LINE 12C:

ALL STAFF, DIRECTORS AND OFFICERS ARE REQUIRED TO ANNUALLY DISCLOSE ANY

CONFLICTS OF INTEREST. THE TRANSACTIONS AND ACTIVITIES OF THE ORGANIZATION

ARE MONITORED ON AN ONGOING BASIS BY MANAGEMENT, THE BOARD OF DIRECTORS AND

BOARD APPOINTED COMMITTEES. ANY CONFLICTS THAT ARISE ARE DEALT WITH

ACCORDING TO THE ORGANIZATION'S DETAILED CONFLICT OF INTEREST POLICIES.

FORM 990, PART VI, SECTION B, LINE 15:

THE COMPENSATION OF THE EXECUTIVE DIRECTOR, DEPUTY DIRECTOR AND CHIEF

FINANCIAL OFFICER IS SET BY THE ORGANIZATION'S EXECUTIVE COMMITTEE BASED

UPON COMPARABLE COMPENSATION DATA FOR THE SAME POSITON FOR ORGANIZATIONS OF

SIMILAR SIZE WITHIN OUR INDUSTRY. THE DECISION OF THE EXECUTIVE COMMITTEE

IS REVIEWED BY THE BOARD OF DIRECTORS PRIOR TO BEING FINALIZED.

THE COMPENSATION OF ALL OTHER STAFF IS DETERMINED VIA A FORMAL SALARY

ADMINSTRATION PROCESS. A JOB DESCRIPTION IS ESTABLISHED FOR EACH POSITION

INCLUDING KNOWLEDGE, SKILLS, AND EXPERIENCES REQUIRED TO PERFORM THE JOB.

EACH POSITION IS PRICED ACCORDING TO MARKET DATA FOR LIKE POSITIONS AT

SIMILAR SIZED ENTITIES. ANNUAL INCREASES ARE BASED ON MERIT MEASURED BY

APPROPRIATE INDICATORS OF JOB PERFORMANCE.

FORM 990, PART VI, SECTION C, LINE 19:

DOCUMENTS ARE AVAILABLE ON THE ORGANIZATION'S WEBSITE AND BY REQUEST TO ANNE ROUSSEAU, CFO.

SCHEDULE R (Form 990)

Related Organizations and Unrelated Partnerships

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

➤ Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

Department of the Treasury Internal Revenue Service

METROPOLITAN BOSTON HOUSING PARTNERSHIP INC. D/B/A METRO HOUSING BOSTON

Open to Public Inspection

OMB No. 1545-0047

Employer identification number 04-2775991

| (a) Name, address, and EIN (if applicable) | (b) Primary activity | (c) Legal domicile (state o | (d) or Total inco | (e) eme End-of-yea | r assets Direct of | _ | |
|--|--|---|----------------------|-----------------------------------|---------------------------|-----------|-------------------------|
| of disregarded entity | | foreign country) | | | e | ntity | |
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| Part II Identification of Related Tax-Exempt Orgorganizations during the tax year. | anizations. Complete if the organization a | answered "Yes" on Form 99 | 0, Part IV, line 34, | because it had one | e or more related tax-ex | empt | |
| (a) | (b) | (c) | (d) | (e) | (f) | Section (| g) 512(b)(13) |
| Name, address, and EIN of related organization | Primary activity | Legal domicile (state or foreign country) | Exempt Code section | Public charity status (if section | Direct controlling entity | cont | rolled tity? |
| | | | | 501(c)(3)) | | Yes | No |
| MBHP OFFICE CORPORATION - 81-2357359 | | | | | METROPOLITAN | | |
| 1411 TREMONT STREET | | | | | BOSTON HOUSING | | |
| BOSTON, MA 02120 | LEASE OFFICE SPACE TO MBHP | MASSACHUSETTS | 501(C)(3) | LINE 12A, I | PARTNERSHIP | | Х |
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METROPOLITAN BOSTON HOUSING PARTNERSHIP

Schedule R (Form 990) 2020 INC. D/B/A METRO HOUSING BOSTON

04-2775991

Page 2

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| | | | T | 1 | | | | | 1 | 1 | | | |
|--|------------------|-------------------|---------------------------|--|----------------|-------------|--------------|-----------|--|---------------|---------------|--------|-----------|
| (a) | (b) | (c) | (d) | (e) | (f) | (g) | (1 | h) | (i) | (j) | (k) | | |
| Name, address, and EIN of related organization | Primary activity | Legal domicile | Direct controlling entity | Predominant income | Share of total | Share of | Disprop | ortionate | Code V-UBI | Genera | or Percentage | | |
| of related organization | | (state or | entity | (related, unrelated, | income | end-of-year | allocations? | | -year allocations? amount in bo | | amount in box | partne | ownership |
| | | foreign country) | | Predominant income (related, unrelated, excluded from tax under sections 512-514) | | assets | Yes | No | amount in box 20 of Schedule K-1 (Form 1065) | Yes | lo | | |
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Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i | i) |
|--|------------------|--|---------------------------|---|-----------------------|-----------------------------------|----------------------|-------------------------------------|--------------------------|
| Name, address, and EIN of related organization | Primary activity | Legal domicile (state or foreign | Direct controlling entity | Type of entity (C corp, S corp, or trust) | Share of total income | Share of end-of-year assets | Percentage ownership | (i Sec 512(k contr enti | o)(13) colled ity? |
| | | country) | | | | | | Yes | No |
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Yes No

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

| 1 | 1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV? | | | | | | | |
|--------------|---|---|------------------------------|---------------|---|--------|-------|------|
| а | Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity | <i>'</i> | | | | 1a | | Х |
| b | Gift, grant, or capital contribution to related organization(s) | | | | | 1b | | Х |
| | Gift, grant, or capital contribution from related organization(s) | | | | | 1c | Х | |
| | Loans or loan guarantees to or for related organization(s) | | | | | 1d | | Х |
| е | Loans or loan guarantees by related organization(s) | | | | | 1e | | Х |
| | | | | | | | | |
| f | Dividends from related organization(s) | | | | | 1f | | Х |
| g | Sale of assets to related organization(s) | | | | | 1g | | Х |
| h | Purchase of assets from related organization(s) | | | | | 1h | | Х |
| i | Exchange of assets with related organization(s) | | | | | 1i | | Х |
| j | Lease of facilities, equipment, or other assets to related organization(s) | | | | | 1j | | Х |
| k | Lease of facilities, equipment, or other assets from related organization(s) | | | | | 1k | x | |
| ı | Performance of services or membership or fundraising solicitations for related organ | | | | | 11 | | Х |
| · m | Performance of services or membership or fundraising solicitations by related organ | | | | | 1m | | Х |
| | Sharing of facilities, equipment, mailing lists, or other assets with related organization | | | | | 1n | | Х |
| | Sharing of paid employees with related organization(s) | | | | | 10 | | Х |
| _ | 3 | | | | | | | |
| g | Reimbursement paid to related organization(s) for expenses | | | | | 1p | | х |
| | Reimbursement paid by related organization(s) for expenses | | | | | 1a | | Х |
| • | | | | | | | | |
| r | Other transfer of cash or property to related organization(s) | | | | | 1r | | Х |
| | Other transfer of cash or property from related organization(s) | | | | | 1s | | Х |
| 2 | If the answer to any of the above is "Yes," see the instructions for information on w | ho must complete t | this line, including covered | relationships | and transaction thresholds. | | | |
| | (a) Name of related organization | (b) Transaction type (a-s) | (c) Amount involved | | (d) Method of determining amount inv | olved | | |
| <u>(1)</u>] | MBHP OFFICE CORPORATION | С | 274,281. | COST | | | | |
| <u>(2)</u>] | MBHP OFFICE CORPORATION | K | 536,016. | COST | | | | |
| (3) | | | | | | | | |
| (4) | | | | | | | | |
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| <u>(5)</u> | | | | | | | | |
| <u>(6)</u> | | | | | | | | |
| 03216 | 3 10-28-20 | 50 | | | Schedule l | R (For | n 990 | 2020 |

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a) | (b) | (c) | (d) Predominant income (related, unrelated, excluded from tax under sections 512-514) | (e) | (f) | (g) | (h | 1) | (i) | (j) | (k) |
|------------------------|------------------|-------------------|---|------------------------|----------|-------------|----------|--------------|--|----------|---------------|
| Name, address, and EIN | Primary activity | Legal domicile | Predominant income | Are all partners se | Share of | Share of | Dispro | por- | Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | General | or Percentage |
| of entity | | (state or foreign | (related, unrelated, leveluded from tax under | 501(c)(3) oras.? | total | end-of-year | allocat | ate ions? | amount in box 20 Lof Schedule K-1 | partne | ownership |
| | | country) | sections 512-514) | Yes No | income | assets | Yes | Nο | (Form 1065) | Yes N | |
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METROPOLITAN BOSTON HOUSING PARTNERSHIP

| Schedule R | (Form 990) 2020 | INC. | D/B/A | METRO | HOUSING | BOSTON | 04-2775991 Page 5 |
|------------|--------------------------------------|-------------|--------------|--------------|-----------------|-----------------|-------------------|
| Part VII | (Form 990) 2020 Supplemental Inform | mation | | | | | , ago o |
| | Provide additional informa | | enoneae to (| augetione on | Schadula B. Sa | ee instructions | |
| | Frovide additional informa | LIOITIOI IE | sponses to t | questions on | Scriedule n. Se | ee manuchons. | |
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Office Use Only: Fiscal Year

THE COMMONWEALTH OF MASSACHUSETTS OFFICE OF THE ATTORNEY GENERAL NON-PROFIT ORGANIZATIONS/PUBLIC CHARITIES DIVISION ONE ASHBURTON PLACE BOSTON, MASSACHUSETTS 02108

E (617) 727-2200, ext. 2101 **02108** www.mass.gov/ago/charities

Form PC

| Report for the Fiscal Period: 07/01/20 to 06/30 | /21 | | | Check all items atta (if applicable) | ached | | |
|--|--|-----------------------|----------------------|---|-------|--|--|
| AG Account #: 017323 Federal ID #: | Filing Fee or P X Electronic Pay Confirmation | | | | | | |
| Electronic Payment Confirmation #: | | | | X Copy of IRS R | eturn | | |
| Attach printout of electro | nic paymer | nt confirmation. | | X Audited Finance Statements/Re | cial | | |
| Electronic Payment Date: | | | | Amended Artic | | | |
| When did the organization first engage in charitable work in Massachusetts? 03/01/1983 | | | | X Schedule A-1 X Schedule A-2 X Schedule RO | | | |
| Has the organization applied for or been granted IRS tax exempt status? | | X Yes | ☐ No | Schedule VCC Probate Accou | | | |
| If yes, date of application OR date of determination letter: | | 07/21/2 | 1993 | | | | |
| IRS Exemption under 501(c): | | 3 | | | | | |
| If exempt under 501(c), are contributions to the organization tax deductible as charitable contributions? | on | X Yes | □ No | | | | |
| Organization Data | | | | | | | |
| Name: METROPOLITAN BOSTON HOUSING | PARTNI | ERSHIP INC | . D/B/A METR | O HOUSING B | OSTO | | |
| Mailing Address: 1411 TREMONT STREET | | | | | | | |
| City: BOSTON | St | tate: MA | ZIP: | 02120-3401 | | | |
| Phone Number: 617-859-0400 | | Fax Number: 61 | 7-532-7552 | | | | |
| Email: ANNE.ROUSSEAU@METROHOUSINGBO | STON. | Website: WWW.1 | METROHOUSING | BOSTON.ORG | | | |
| In the table below, please enter the appropriate codes from the c Enter up to 2 codes from Table 3 for your organization's main pu | irpose(s) | ing tables found in t | | | | | |
| Category | Code | | Category | | Code | | |
| County (Table 1) | 13 | Organization Purpo | ose Code 1 | | 10 | | |
| Type of Organization (Table 2) | 12 | Organization Purpo | ose Code 2 | | 31 | | |
| Please check box if final return prior to dissolution: | Please check box if final return prior to dissolution: | | | | | | |
| Form PC Rev. 09/2020 078001 10-07-20 | Page [·] | 1 of 15 | Office Use Only: Pay | yment Received | | | |
| | | 1 | | | | | |

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All questions must be completed in their entirety whether or not similar questions are answered in an attached federal form. See instructions and definition section for guidance.

| 1. | On what date was the organization created? <u>03/01/1983</u> |
|----|--|
| 2. | Where was the organization created? BOSTON, MA |
| 3. | What is the form of organization? (check one) |

| Corporation | X | Testamentary Trust | |
|----------------------------|---|--------------------|--|
| Unincorporated Association | | Inter Vivos Trust | |
| Other (please describe): | | | |

4. Was your organization related to any other organization(s) during the reporting year (see definition "Related Organization")? If yes, please complete the Schedule RO on pages 13 and 14.

5. Enter your summary of financial data:

| | Financial Data | Amounts |
|----|--|--------------|
| A. | Contributions, gifts, grants, and similar amounts received | 1,902,736. |
| В. | Gross support and revenue | 271,279,576. |
| C. | Program services and similar amounts paid out | 265,484,342. |
| D. | Fundraising expenses | 371,319. |
| E. | Management and general expenses | 992,493. |
| F. | Payments to affiliates | 0. |
| G. | Total expenses | 266,848,154. |
| Н. | Net assets or fund balances at the end of the year | 14,821,882. |

6. List the total compensation you provided to your five highest paid employees:

| | Name/Title | Hrs/ Week | Salary and Other Income | Benefit Plans | Other Compensation |
|----|----------------------------------|--------------|----------------------------|---------------|-----------------------|
| | CHRISTOPHER NORRIS | | | | |
| 1. | PRESIDENT AND EXECUTIVE DIRECTOR | 40.00 | 219,206. | 34,960. | 0. |
| | ANNE ROUSSEAU | | | | |
| 2. | TREASURER AND CFO | 40.00 | 165,626. | 7,144. | 0. |
| | SUSAN NOHL | | | | |
| 3. | DEPUTY DIRECTOR | 40.00 | 157,830. | 10,175. | 0. |
| | AKIDA NAU | | | | |
| 4. | DIRECTOR OF IT | 40.00 | 119,605. | 34,754. | 0. |
| | STEVEN FARELL | | | | |
| 5. | CHIEF OPERATING OFFICER | 40.00 | 132,351. | 19,444. | 0. |

| 7. | Was any compensation provided to any of the individuals listed in question 6 above which was not quantified in your res | | |
|----|---|-----|------|
| | provide explanation (attach separate sheet). | Yes | X No |

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8. List the name, amount of compensation paid, and the nature of services rendered by each of the organization's five highest paid consultants providing professional services (e.g. attorneys, architects, accountants, management companies, investment advisors, professional solicitors, professional fundraising counsel).

| | Name/Title | Amount of Compensation | Type(s) of Service |
|----|-------------------------------|------------------------|--------------------|
| | | | FSS PROGRAM |
| 1. | COMPASS WORKING CAPITAL | 248,094. | CONTRACTOR |
| | | | TEMP STAFFING |
| 2. | PLANET PROFESSIONAL | 277,839. | SOLUTION |
| | | | |
| 3. | REGIONAL HOUSING NETWORK | 141,984. | CONTRACT SERVICES |
| | | | PROFESSIONAL |
| 4. | SMC PARTNER, LLC | 184,245. | SERVICES |
| | | | |
| 5. | YEAR UP PROFESSIONAL RESOURCE | 219,529. | CONTRACT SERVICES |

9. Bank(s) in which the organization's funds are deposited (include bank addresses and phone number):

| | Bank | Address | | Phone Number |
|-----|---|---|-------------|-----------------|
| S | EE STATEMENT 1 | | | |
| | | | | |
| | | | | |
| 10. | What is the organization's accounting method? | Cash X Accrual | | |
| | | Other (specify): | | |
| 11. | If organization's mailing address is a P.O. Box, list | t the organization's full street address: | | |
| | Address: | | | |
| | City: | | State: 2 | ZIP Code: |
| 12. | Contact Person Name: ANNE ROUSSEA | U | | |
| | Street Address: 1411 TREMONT STR | EET | | |
| | City: BOSTON | | State: MA 2 | ZIP Code: 02120 |
| | Phone Number: 617-425-6780 | | | |

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METROPOLITAN BOSTON HOUSING PARTNERSHIP

| | INC. D/B/A METRO HOUSING BOSTON 04-2775991 | |
|-----|--|------|
| 13. | During the fiscal year reported here, did your organization solicit contributions or have funds solicited on its behalf? | ☐ No |
| 14. | At any time during the fiscal year following the year reported here, will your organization, or others acting on its behalf, solicit contributions? If you answered yes to Question 13 or 14, you must complete Schedule A-1 and/or Schedule A-2 unless you are exempt from the solicitation certificate requirement. | □ No |
| 15. | If you are claiming an exemption from the solicitation certificate requirement, please indicate by checking the box to the right to identify which exemption applies to your organization. | |
| | a religious organization | |
| | an organization which: (a) does not raise more than \$5,000 during a calendar year OR does not receive contributions from more than ten persons during a calendar year; AND (b) carries out all of its activities, including fundraising, through unpaid | |
| | volunteers. (The conditions at both (a) and (b) must be met for your organization to qualify for this exemption.) | |
| 16. | Attach a list of names, addresses (street and/or mailing), and telephone numbers of other offices/chapters/branches/affiliates. STATEMENT 2 | |
| 17. | Attach a list of names, titles, and addresses (street and/or mailing) of officers, directors, trustees, and the principal salaried executives of organization. STATEMENT 3 | |
| 18. | Attach a list of names, titles, and addresses (street and/or mailing) of any individual(s) authorized to sign checks, and any individual(s) responsible for: custody of funds; distribution of funds; fundraising; and custody of financial records. STATEMENT 4 | |
| 19. | Has this organization or any of its officers, directors, employees or fundraisers solicited funds in any other state? | X No |
| | If yes attach list of states where solicitation was conducted, including registered agency, dates of registration, registration numbers, any other names under which the organization was/is registered, and the dates and type (mail, telephone, door to door, special events, etc.) | |

the solicitation conducted.

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| FORM PC | BANK | IN WHIC | H FUNDS | ARE D | EPOSITED | STATEMENT | 1 |
|---|------|--------------|---------|--------|------------|--------------|---|
| NAME AND ADDRESS | | | | | | PHONE NUMBER | |
| BANK OF AMERICA 100 FEDERAL STREET BOSTON, MA 02110 | | | | | | 617-434-3412 | |
| STATE STREET BANK ONE LINCOLN STREET BOSTON, MA 02206 | | | | | | 617-786-3000 | |
| CITIZENS BANK 28 STATE STREET BOSTON, MA 02109 | | | | | | 401-734-5295 | |
| BOSTON PRIVATE BANK 10 POST OFFICE SQUAR BOSTON, MA 02109 | E | | | | | 617-912-1900 | |
| EASTERN BANK 256 FRANKLIN STREET BOSTON, MA 02110 | | | | | | 617-897-1100 | |
| FORM PC N. | AME, | ADDRESS , | PHONE | OF OTH | ER OFFICES | STATEMENT : | 2 |
| NAME AND ADDRESS | | PHONE NUMBER | | | | | |

NONE

| FORM PC | OFFICERS, | DIRECTORS, | TRUSTEES | AND EXECUTIVES | STATEMENT | 3 |
|--|-----------|------------|----------|----------------|-----------|---|
| NAME AND ADDRES | SS | | | TITLE | | |
| CHRISTOPHER T. 1411 TREMONT ST BOSTON, MA 021 | REET | | | PRESIDENT/EXEC | DIRECTOR | |
| ANNE ROUSSEAU 1411 TREMONT ST BOSTON, MA 021 | | | | TREASURER/CFO | | |
| SUSAN NOHL 1411 TREMONT ST BOSTON, MA 021 | | | | DEPUTY DIRECTO | PR | |
| ELIZABETH GRUBE 1411 TREMONT ST BOSTON, MA 021 | REET | | | BOARD CO-CHAIR | | |
| CYNTHIA LACASSE 1411 TREMONT ST BOSTON, MA 021 | REET | | | BOARD CO-CHAIR | <u>.</u> | |
| TERRY SAUNDERS 1411 TREMONT ST BOSTON, MA 021 | REET | | | CLERK | | |
| NADER ACEVEDO 1411 TREMONT ST BOSTON, MA 021 | | | | DIRECTOR | | |
| STEPHEN ADAMO 1411 TREMONT ST BOSTON, MA 021 | | | | DIRECTOR | | |
| KEVIN BOYLE 1411 TREMONT ST BOSTON, MA 021 | | | | DIRECTOR | | |
| SUSANNE CAMERON 1411 TREMONT ST BOSTON, MA 021 | REET | | | DIRECTOR | | |
| YONGMEI CHEN 1411 TREMONT ST BOSTON, MA 021 | | | | DIRECTOR | | |
| CASSANDRA M. CL 1411 TREMONT ST BOSTON, MA 021 | REET | | | DIRECTOR | | |

METROPOLITAN BOSTON HOUSING PARTNERSHIP ROBERT TORRES DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 MELISSA FISH-CRANE DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 JANET FRAZIER DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 LANGLEY KEYES DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 JOSEPH KRIESBERG DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 MARY-ANNE MORRISON DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 RICHARD MURAIDA DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 PETER MUNKENBECK DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 JEFFREY H. PACKARD DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 ESTHER SCHLORHOLTZ DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 GEOFFREY SHERMAN DIRECTOR 1411 TREMONT STREET BOSTON, MA 02120-3401 DONALD E. VAUGHAN DIRECTOR

1411 TREMONT STREET BOSTON, MA 02120-3401

MICHAEL WIDMER 1411 TREMONT STREET BOSTON, MA 02120-3401 DIRECTOR

| FORM PC | PAGE 4, LINE 18 | STATEMENT 4 |
|--|-------------------------|-----------------|
| NAME AND ADDRESS | AREA OF RESPONSIBILITY | |
| CHRISTOPHER NORRIS 1411 TREMONT STREET BOSTON, MA 02120-3401 | RESPONSIBLE FOR CUSTODY | OF FUNDS |
| CHRISTOPHER NORRIS 1411 TREMONT STREET BOSTON, MA 02120-3401 | RESPONSIBLE FOR DISTRIE | BUTION OF FUNDS |
| CHRISTOPHER NORRIS 1411 TREMONT STREET BOSTON, MA 02120-3401 | RESPONSIBLE FOR FUNDRAL | ISING |
| CARLA BEAUDOIN 1411 TREMONT STREET BOSTON, MA 02120-3401 | RESPONSIBLE FOR FUNDRAL | ISING |
| CHRISTOPHER NORRIS 1411 TREMONT STREET BOSTON, MA 02120-3401 | CUSTODY OF FINANCIAL RE | ECORDS |
| CHRISTOPHER NORRIS 1411 TREMONT STREET BOSTON, MA 02120-3401 | AUTHORIZED TO SIGN CHEC | CKS |
| ANNE ROUSSEAU 1411 TREMONT STREET BOSTON, MA 02120-3401 | AUTHORIZED TO SIGN CHEC | CKS |

20. Has this organization or any of its officers, directors, or employees:

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| | If ye | s, please attach an explanation. | | |
|-----|-------|---|-----------|------|
| | (a) | Been enjoined or otherwise prohibited by a government agency/court from operating or soliciting contributions? | Yes | X No |
| | (b) | Ever been refused registration or had its registration or tax exemption denied, suspended, modified or revoked by a governmental agency? | Yes | X No |
| | (c) | Been the subject of a proceeding regarding any solicitation or registration? | Yes | X No |
| | (d) | Entered into a voluntary agreement of compliance or consent judgment with, any government agency or in a case before a court or administrative agency? | Yes | X No |
| 21. | | e any restrictions been removed during the year from donor-restricted funds? s, please attach an explanation. | Yes | X No |
| 22. | | e donor-restricted funds been loaned to unrestricted funds? es, please attach an explanation. | Yes | X No |
| 23. | Parl | s question involves "Termination of Employment or Changes of Control Compensatory Arrangements" with certain "Relacies" (see instructions and definition sections). Report only if payments made or promised to any individual are in excess our months salary or \$100,000, whichever dollar amount is less. | | |
| | (a) | Did you make actual payments or otherwise transfer value under such an arrangement to any individual described in Related Party definition, sections (a) or (b), which payments are not reported in Question 6 or 7 above? | Yes | X No |
| | (b) | Do you have an agreement with any individual described in Related Party definition, sections (a) or (b), containing such an agreement? | Yes | X No |
| | • | ou answered yes for Question 23(a) or 23(b) above, please attach an explanation identifying the individual(s) involved, sta ount of any payments made or value transferred, and describing the terms of each agreement. | ating the | |

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24. This question applies to related party transactions, which include transactions with officers, directors, trustees, certain employees, relative, and organizations they own or control. Please consult the instructions and definition sections for the definition of a "Related Party" and "Indebtedness" before answering. Note that transactions involving related parties must be reported even when there is no accounting recognition (e.g. in-kind gifts, waiver or interest not otherwise reported).

If the answer to any part of Question 24 is **yes**, attach a schedule stating the name and address of the related party, the nature of the transaction, the value or the amounts involved in the transaction, and the procedure followed in authorizing the transaction.

| | During the year: | | |
|----|--|-------|------|
| A. | Has your organization sold or transferred assets to or purchased assets from or exchanged assets with a related party? | Yes | X No |
| B. | Has your organization leased assets to or leased assets from a related party? | X Yes | ☐ No |
| C. | Has your organization been indebted to a related party? | Yes | X No |
| D. | Has your organization allowed a related party to be indebted to it? | Yes | X No |
| E. | Has your organization made or held an investment in a related party? | Yes | X No |
| F. | Has your organization furnished goods, services, or facilities to a related party? | Yes | X No |
| G. | Has your organization acquired goods, services, or facilities from a related party who received compensation or other value in return? | Yes | X No |
| Н. | Has your organization paid or became obligated to pay wages, salary, or other compensation to a related party? | Yes | X No |
| l. | Has your organization transferred income or assets to or for use by a related party? | Yes | X No |
| J. | Was your organization a party to any transaction in which any of its officers, directors, or trustees has a material financial interest, or did any officer, director or trustee receive anything of value not reported as compensation? | Yes | X No |
| K. | Has your organization invested in any corporate stock of a company in which any officer, director, or trustee owns more than 10% of the outstanding shares? | Yes | X No |
| L. | Is any property of the organization held in the name of or commingled with the property of any other person or organization? | Yes | X No |
| М. | Did your organization make a grant award or contribution to any other organization in which any of this organization's officers, directors or trustees has a relationship? | Yes | X No |

STATEMENT 5

PAGE 6, LINE 24 STATEMENT FORM PC

NAME AND ADDRESS

MBHP OFFICE CORPORATION 1411 TREMONT STREET BOSTON, MA 02120

NATURE OF TRANSACTION

AMOUNT INVOLVED

RENT OF OFFICE SPACE FROM RELATED PARTY

536,016.

PROCEDURE FOLLOWED

ALL TRANSACTIONS WITH RELATED PARTIES ARE REVIEWED AND APPROVED BY MANAGEMENT WITH THE OVERSIGHT OF THE BOARD OF DIRECTORS.

| nder penalty of perjury, I declare that the information furnished in this reporrect to the best of my knowledge. | ort, including all attacl | nments, is true and |
|--|---------------------------|---------------------|
| ignature: | | Date: |
| rinted Name: ANNE ROUSSEAU | | |
| Title: TREASURER AND CFO | | |
| Name of Preparer: DANIEL DENNIS & COMPANY LLP | | |
| Address 990 WASHINGTON STREET, STE 308A | | |
| DEDHAM | State MA | ZIP Code 02026 |
| | | |

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Schedule A-1 Solicitation Activities During Fiscal Year Covered By This Report

| List any names which will be used by the organization in conn page 1. | ection with the solicitation of funds, other than the officia | al name which appears on |
|---|---|--------------------------|
| | | |
| Types of solicitation activities in which you expect to engage (| check all that apply): | |
| Mass Mailing | Via the Internet | |
| Door-to-door | Raffle, beano, bingo or gaming event | t \Box |
| Entertainment event | Sale of goods other than by telephor | |
| Telemarketing without sale of goods or ads | Individual Mailings | X |
| Telemarketing with sale of goods | Corporate solicitations | X |
| Telemarketing with sale of ads | Grant Proposals | X |
| Other (specify): | | |
| Professional solicitor* | Own employees | X |
| Professional fundraising counsel* | Volunteers | |
| Commercial co-venturer* | | |
| * Provide applicable names and addresses: Professional Solicitor Name: N/A | | |
| Address | | |
| City | State ZIP | Code |
| Professional Fundraising Counsel Name: | | |
| Address | | |
| City | State ZIP | Code |
| Commercial Co-Venturer Name: | | |
| Address | | |

City _____ State ____ ZIP Code _

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Schedule A-1 ctd.

Solicitation Activities During Fiscal Year Covered By This Report

Identify the individuals who will have final responsibility for the charity's custody of contributions:

CHRISTOPHER NORRIS Name and Title: PRESIDENT AND EXECUTIVE DIRECTOR Address 1411 TREMONT STREET City BOSTON State MA ZIP Code 02120-3401 Name and Title: ______ Name and Title: City _____ State ____ ZIP Code ____ Identify the individuals who will have final responsibility for the charity's distribution of contributions: CHRISTOPHER NORRIS Name and Title: PRESIDENT AND EXECUTIVE DIRECTOR Address 1411 TREMONT STREET State MA ZIP Code 02120-3401 City BOSTON Name and Title:
 City
 _______ State
 _______ ZIP Code

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City _____ State ____ ZIP Code ____

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Schedule A-2

Solicitation Activities Planned for Fiscal Year Which Follows the Reporting Year

| List any names which will be used by the organization in con page 1. | nection with the solicitation of funds, other t | nan the official name which app | ears on |
|---|---|---------------------------------|---------|
| | | | |
| Types of solicitation activities in which you expect to engage | (check all that apply): | | |
| Mass Mailing | Via the Internet | | |
| Door-to-door | Raffle, beano, bingo or | gaming event | |
| Entertainment event | Sale of goods other tha | <u> </u> | |
| Telemarketing without sale of goods or ads | Individual Mailings | , . | X |
| Telemarketing with sale of goods | Corporate solicitations | | X |
| Telemarketing with sale of ads | Grant Proposals | | X |
| Other (specify): | <u> </u> | | |
| Identify the method or methods you expect to use for the fur | | | X |
| Professional solicitor* | Own employees | | |
| Professional fundraising counsel* Commercial co-venturer* | Volunteers | | |
| * Provide applicable names and addresses: Professional Solicitor Name: N/A | | | |
| Address | | | |
| City | State | ZIP Code | |
| Professional Fundraising Counsel Name: | | | |
| Address | | | |
| City | State | ZIP Code | |
| Commercial Co-Venturer Name: | | | |
| Address | | | |
| City | State | ZIP Code | |

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Schedule A-2 ctd.

Solicitation Activities Planned for Fiscal Year Which Follows the Reporting Year

Identify the individuals who will have final responsibility for the charity's custody of contributions: CHRISTOPHER NORRIS

Name and Title: PRESIDENT AND EXECUTIVE DIRECTOR Address 1411 TREMONT STREET City BOSTON State MA ZIP Code 02120-3401 Name and Title: City State ZIP Code City _____ State ____ ZIP Code _____ Identify the individuals who will have final responsibility for the charity's distribution of contributions: CHRISTOPHER NORRIS Name and Title: PRESIDENT AND EXECUTIVE DIRECTOR Address 1411 TREMONT STREET State MA ZIP Code 02120-3401 City BOSTON Name and Title:
 City

 State

 ZIP Code

 City _____ State ____ ZIP Code ____

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Certification by Organization

Two different signatures required. Signers must be organization president or other authorized officer or trustee.

Under penalty of perjury, we declare that the information furnished in this report, including all attachments, is true and correct to the best of our knowledge.

| Signature: | Date: |
|---|-------|
| Printed Name: ANNE ROUSSEAU | |
| Title: TREASURER AND CFO | |
| | |
| Signature: | Date: |
| Printed Name: CHRISTOPHER NORRIS | |
| Title: PRESIDENT AND EXECUTIVE DIRECTOR | |

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Schedule RO

1. Please read the instructions and definition of "Related Organization" carefully before completing this section. (If you have more than five Related Organizations, please attach a list.)

| Name: MBHP OFFICE CORPORATION | | Primary purpose or activity: | LEASE OFFICE SP | ACE TO MBHP |
|-------------------------------|---|--|--|--------------------------------|
| FYE | A. Donor restricted funds (-) liabilities | B. 3rd party restricted funds (-) liabilities | C. Unrestricted funds (-) liabilities | D. Total net assets (A+B+C) |
| 06/30/21 | | | | 2,391,551. |
| | | | | |
| Name: | | Primary purpose or activity: | | |
| FYE | A. Donor restricted funds (-) liabilities | B. 3rd party restricted funds (-) liabilities | C. Unrestricted funds (-) liabilities | D. Total net assets (A+B+C) |
| | | | | |
| Name: | | Primary purpose or activity: | | |
| FYE | A. Donor restricted funds (-) liabilities | B. 3rd party restricted funds (-) liabilities | C. Unrestricted funds (-) liabilities | D. Total net assets (A+B+C) |
| | | | | |
| Name: | | Primary purpose or activity: | | |
| FYE | A. Donor restricted funds (-) liabilities | B. 3rd party restricted funds (-) liabilities | C. Unrestricted funds (-) liabilities | D. Total net assets (A+B+C) |
| | | | | |
| Name: | | Primary purpose or activity: | | |
| FYE | A. Donor restricted funds (-) liabilities | B. 3rd party restricted funds (-) liabilities | C. Unrestricted funds (-) liabilities | D. Total net assets (A+B+C) |

Schedule RO ctd.

2. List the total compensation paid by your organization and/or any other related organization to your chief executive (e.g., executive director) and to the four other current or former directors, trustees, officers, or employees within the system of related organizations identified at question 1, on page 13, receiving the highest aggregate compensation (see *instructions*). Use additional lines below to itemize by compensation source.

| Name: CHRISTOPHER NORRIS | \$ | Title: PRESIDENT ANI | EXECUI | IVE DIRECTOR |
|---------------------------------------|---------------------------------|----------------------------------|-------------------|--------------------|
| Income Source: | Salary and Other Income: | Benefits Plan: | | Other Compensation |
| | | | | |
| MBHP | 219,206. | | 34,960. | |
| | | | | |
| Name: ANNE ROUSSEAU | | Title: TREASURER ANI | CFO | |
| Income Source: | Salary and Other Income: | Benefits Plan: | | Other Compensation |
| МВНР | 165,626. | | 7,144. | |
| | | | | |
| Name: | | Title: | | |
| Income Source: | Salary and Other Income: | Benefits Plan: | | Other Compensation |
| | | | | |
| Name: | | Title: | | |
| Income Source: | Salary and Other Income: | Benefits Plan: | | Other Compensation |
| _ | | | | |
| Name: | | Title: | | |
| Income Source: | Salary and Other Income: | Benefits Plan: | | Other Compensation |
| | | | | |
| Is asset and/or compensation informat | ion for religious organizations | and/or certain non-charitable en | tities related to | , |
| foundations excluded pursuant to inst | | | | Yes X |

foundations excluded pursuant to instructions?

Form PC - Schedule RO 078014