

CARRYING THE WEIGHT, LEADING THE CHANGE

Technical Appendix: Terminology, Data Sources & Analytic Methods

Boston Women's Fund — 2025

Research Team

Qualitative Research - Grassroots Leaders Focus Groups & Interviews

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About This Document

This appendix accompanies the report *Carrying the Weight, Leading the Change* and provides detailed descriptions of data sources, analytic methods, and terminology used in the quantitative and qualitative research components. It is intended for researchers, practitioners, and data users seeking methodological transparency and reproducibility.

Table of Contents

Research Team	1
About This Document	1
Table of Contents	2
I - Data Sources, Definitions & Quantitative Methods	3
Data Sources & Scope	3
Geography Included in Analysis	3
Years Included in Analysis	3
Population Data Sources	3
Topic Definitions & Analytic Methods	4
Gender	4
Race/Ethnicity	5
Nonprofit Organizations by Type	7
Universe of Nonprofits Included in Analysis	7
Women, Girls & Gender-Expansive Serving Organizations	9
Nonprofit Organizations by Leader Demographics	11
Grassroots Organizations	14
II - Grassroots Leader Focus Groups & Interviews	17
Qualitative Data & Methods	17
Participant Sampling	17
Data Collection	18
Data Coding and Analysis	19
Reliability and Validity	20
Response Validation	20
III - Funder Interviews	22

I – Data Sources, Definitions & Quantitative Methods

This section of the appendix provides definitions, data sources, and methodological notes for the quantitative analyses presented in the report, outlining how key measures were defined, how data were compiled and validated, and any conditions necessary for interpreting results.

Data Sources & Scope

The following details the specific geography, timespan and specific datasets included in the quantitative analysis:

Geography Included in Analysis

Greater Boston is defined as the five-county region of **Essex, Middlesex, Norfolk, Plymouth, and Suffolk**. Where possible, both population and organization data are aggregated to this geography. When data are unavailable at this granularity, figures are presented for the **City of Boston** and/or the **Commonwealth of Massachusetts**.

Years Included in Analysis

This study covers the years 2018 through 2023, unless otherwise noted, using the most recent and complete data available for each source.

Population Data Sources

U.S. Census Bureau

- *American Community Survey (ACS) 5-Year Estimates, 2014–2018 and 2019–2023* — Used for demographic, economic, and housing data.
- *American Community Survey (ACS) 1-Year Estimates, 2018–2023* — Used where annual year-over-year comparisons are necessary.
- *Public Use Microdata Sample (PUMS), 2014–2018 and 2019–2023* — Used for household-level analysis, income distribution, and custom segregation and sorting measures.
- *Decennial Census Summary Files* — Used as baseline reference points for long-term demographic comparison.

Centers for Disease Control and Prevention (CDC)

- *Behavioral Risk Factor Surveillance System (BRFSS), Massachusetts Subset, 2013 - 2023* — Used for adult health, well-being, and behavioral indicators.
- *Youth Risk Behavior Surveillance System (YRBSS), Massachusetts Subset, 2011 - 2021* — Used for adolescent health and well-being measures.

Boston Public Health Commission (BPHC)

Health of Boston Series Reports, 2019–2023 — Used for health and mortality trends among Boston residents by race, gender, and neighborhood.

Massachusetts Department of Elementary and Secondary Education (DESE)

- *School Safety and Discipline Report, 2023–2024* — Used for analysis of student discipline and school climate indicators.
- *Enrollment and Demographic Data, 2018–2023* — Used for gender and race/ethnicity comparisons among students.

U.S. Bureau of Labor Statistics (BLS)

- *Consumer Price Index (CPI), Boston–Cambridge–Newton Metropolitan Area, 2018–2023* — Used for inflation adjustments and conversion to constant-dollar values.

Topic Definitions & Analytic Methods

The following section outlines key terminology and methodological approaches used in this report, particularly for topics where definitions vary across data sources. Wherever possible, the analysis adheres to established standards and classifications in examining population demographics and nonprofit sectors. In certain cases, definitions were broadened to better reflect the realities and fluidity of concepts such as gender or race and ethnicity.

Gender

This report seeks to be inclusive and expansive in the use of the term “women” to include transgender women and gender-expansive people. However, there are significant limitations in standard and available datasets pertaining to transgender and gender-expansive people. Where available, data on gender-expansive people are included, though they may not be comparable to other populations in the analysis. Gender definitions and availability vary across domains and sources utilized in this study, for example:

Among **population data sources**,

- Census/ACS, BRFSS, YRBSS, and MassDESE data present gender in the binary male/female
- Among health data sources, such as BRFSS and YRBSS, data are available for sexual orientation/gender identity under the umbrella LGBTQ+ category, but do not differentiate between sexual orientation and gender identity, and are not comparable to binary gender identity categories.
- Mass DESE has begun collecting and publishing student achievement data by gender to include male, female, and nonbinary. However, due to small sample sizes, those have not been reported in this study.

Among **nonprofit data sources**, eader demographics include self-reported characteristics of sexual orientation and gender identity separately with the option to choose male, female, transgender, cisgender, non-binary, or another identity. For this study, “women and gender-expansive” leaders include those who self-identify as a cisgender or transgender woman or non-binary. (see [methodology](#) for more details)

Race/Ethnicity

Racial and ethnic identity data are similarly limited in how categories are defined and vary across datasets in ways that limit detail and comparability. This study makes use of—and is limited by—existing data standards and classifications, though some additional analysis may provide additional nuance.

American Community Survey: the Census utilizes standard Office of Management & Budget (OMB) race/ethnicity classifications, whereby ethnicity refers only to Hispanic/Latino or not Hispanic/Latino separately from race categories. The majority of summary statistics follow the standard schema for race/ethnic reporting, including demographic, health and education data unless otherwise noted:

- Hispanic/Latino of any race
- Black/African American alone, any ethnicity
- Asian alone, any ethnicity
- American Indian/Alaska Native or Native Hawaiian/Pacific Islander alone, any ethnicity
- Multiracial - Two or more races, any ethnicity
- Another race, any ethnicity
- White, not Hispanic or Latino

In some cases, data have been analyzed to fully separate race/ethnicity for a standardized comparison across all groups (all Hispanic/Latino compared to all non-Hispanic racial groups); this approach also allows for racial diversity among the broader Hispanic/Latino population, such as identifying the Afro-Latina population.

More detailed race/ethnicity: the existing classifications do not allow for insights into people and communities based on more specific racial and ethnic identity. In 2025, OMB will be shifting to a new model of data collection that will not separate ethnicity from race and also creates a new category called "Middle Eastern North African." However, for the current analysis, there are limited options for analyzing racial/ethnic diversity. Options include the following:

- Specific groups for Hispanic/Latino: by region/specific nation of ancestral/ethnic identity
- Specific groups for the Asian population only, by region/specific nation of ancestral/ethnic identity
- Ancestry: includes specific nationalities grouped by region/nation for the non-Hispanic, non-Asian population, including Sub Saharan Africa, Middle Eastern, West Indian/Caribbean, and Brazil
- Place of Birth: for the foreign-born population only, includes regions of the world and specific countries of origin

Leader Demographics: Candid demographic data follows the [Philanthropic Classification Schema](#) and also allows for a self-reported, open field race/ethnicity descriptor. As a result, these categories do not correspond to the OMB classification. This study classifies BIPOC as non-White/Caucasian with some additional removals (such as "Hibernian American"). The following is a complete list and count of race/ethnic categories reported in Greater Boston's leadership demographic data. (see [methodology](#) for detailed list of race/ethnic categories)

Nonprofit Organizations by Type

The following details methodology for analyzing nonprofit sector financial data by population served and leader demographics.

Universe of Nonprofits Included in Analysis

The universe of organizations included in this study is derived from the [IRS Exempt Organizations Business Master File](#) (EO-BMF) as of June 2024 and updated and de-duplicated as of February 2025.

Data Validation: The initial universe of organizations was then cross-referenced with IRS tax filing data (forms 990, 990-EZ, 990-PF, and 990-N), the IRS automatic revocation list, and with external data sources including including [Candid \(formerly Guidestar\)](#), ProPublica [Nonprofit Explorer](#), and [Giving Tuesday Data Commons Projects](#), to verify filing status, validate [National Taxonomy of Exempt Entities](#) (NTEE) classification, and to link financial data for the years 2018 through 2023. When necessary, organization data were manually verified and entered into the dataset.

Removed organizations: In the process of data validation, 63 organizations were removed from the dataset, including 16 organizations erroneously included in the Massachusetts BMF but currently registered or headquartered in another state. The additional 47 organizations removed from the dataset were unique entities of the Mass General Brigham Hospital System, which ceased filing individual tax returns in 2019 and have subsequently filed a group return under a single entity (Mass General Brigham Incorporated EIN 04-3230035). Two additional separate Mass General Brigham entities remain in the dataset: Dana Farber Cancer Care (EIN 04-3320640) and Mass General Brigham Health Plan Inc (EIN 04-2932021), both of which continue to operate as unique organizations.

Active, priority organizations: Because the IRS Business Master file is a cumulative list of all registered organizations, it includes entities that are not required to file with the IRS (churches and religious institutions), organizations that have unknown or revoked status due to lack of filing, and newer entities that have yet to file tax returns.

Table 1: IRS Business Master File, Number of Organizations by County			
As of 6/2024 and 2/2025 combined, de-duplicated			
*Counts are after removal of organizations no longer located in Mass and non-filing Mass General Brigham entities			
Total Orgs in Mass. = 42,375			
Greater Boston	28,518	Rest of Mass.	13,857
Essex	4,182	Barnstable	1,813
Middlesex	10,316	Berkshire	1,058
Norfolk	4,555	Bristol	2,342
Plymouth	2,834	Dukes	317
Suffolk	6,631	Franklin	697
		Hampden	2,120
		Hampshire	1,149
		Nantucket	172
		Worcester	4,189

For the purposes of this study, this initial universe of 28,518 organizations was further refined to a core sample of 10,584 organizations based on the following criteria:

- **With recent financial data:** at least one year of tax filing data within the calendar years 2022 through 2024 reporting revenue, expenses, assets, and deficits from Form 990 or Form 990-EZ.
- **Not primarily a grantmaking entity:** to focus on community-based, and community-serving organizations, the universe excluded any organizations filing Form 990-PF (Private Foundations) and those classified as private foundations or named trusts based on NTEE codes.

Total Organizations	28,518
Within recent filing data (2022 - 2024)	21,624
Not grantmaking (ex Form 990-PF & NTEE Philanthropy)	18,044
With 990/990-EZ financial data	10,584

Due to the requirement of active financial data, the final universe excludes 7,379 active organizations that have filed Form 990-N at least once between 2022 and 2024. These organizations typically have less than \$50,000 in revenue and are not required to provide any financial data if they [meet certain criteria](#). Also excluded from analysis are 42 organizations that incorporated between the years 2022 and 2024 but have yet to file tax returns or have no tax data on record as of February 2025.

Women, Girls & Gender-Expansive Serving Organizations

The following approaches were taken to identify and classify Greater Boston organizations that primarily serve women, girls, and gender-expansive (WGGE) people:

- 1) **Application of existing research and methodological frameworks:** Organizations in this study were classified as WGGE-serving based on their inclusion in existing research frameworks for measuring the nonprofit and philanthropic sectors serving these populations, specifically:
 - a) Organizations included in the [2024 Women & Girls Index](#), developed by the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy; and
 - b) Organizations included in the [2024 LGBTQ+ Index](#) specifically serving transgender and gender-expansive people.
- 2) **NTEE Classification:** this initial universe of WGGE-serving organizations was verified and supplemented to include additional organizations classified by the following NTEE codes:

Table 3: NTEE Codes used to identify WGGE-serving organizations	
Community Improvement/Capacity building	Human Services: Multipurpose & Other
S81 - Community development, women's clubs	P43 - Family services, domestic violence
Civil Rights, Social Action, Advocacy	P47 - Family services, pregnancy centers
R24 - Civil/human rights, advocacy, women	P83 - Human services, special populations, women's centers & services
R26 - Civil/human rights, advocacy, gays/lesbians	Mental Health, Crisis Intervention
R61 - Civil liberties, advocacy, reproductive rights	F42 - Crisis services, hotlines, rape victim services
Health - General & Rehabilitation Services	Public Protection, Legal Administration, Legal Services
E41 - Health care, reproductive health, OBGYN/Birthing centers	I71 - Abuse prevention, domestic violence prevention
E42 - Health care, reproductive health, family planning	I73 - Abuse prevention, sexual abuse prevention
E43 - Health care, reproductive health, fertility	Youth Development
Health - Multipurpose Associations/Associated Services	O22 - Youth development, centers & clubs, girls clubs
G32 - Cancer, breast cancer	O42 - Youth development, scouting agencies, Girl Scouts
Social Science Research Institutes/Services	

Table 3: NTEE Codes used to identify WGGE-serving organizations	
V32 - Social sciences, interdisciplinary studies, women's studies	

- 3) **Key word search:** or terms related to gender, gender identity and gender-specific roles as well as key issues or topics disproportionately affecting women, girls, and gender-expansive people, including:
- a) Gender-specific terms such as: *woman(en), girls, her, she, gender, transgender, lesbian, LGBTQ, sister, daughter, mother, mom, mama, alumnae, female, and feminine;*
 - b) Gender-specific terms in other languages or related to specific communities of women, including: *latina, mujer(es), mulher(es), damme(s), fille(s);*
 - c) Issues or domains pertaining to women, girls, and gender-expansive people, including: *reproductive, abortion, gynecology, obstetric, birth, breast, pregnancy, domestic violence, rape, sexual violence,* among others.

Based on these criteria for classification as a women-, girls-, or gender-expansive-serving organization, this study identified a total of 941 WGGE-serving organizations in Greater Boston, of which 398 have recent tax filing data (last tax filing 2022 - 2024), are not primarily a grantmaking entity (excluding Form 990-PF and NTEE *Philanthropy*), and include financial data from forms 990 or 990-EZ.

An additional 295 organizations identified as WGGE-serving are active but lack any available financial data due to their status as a Form 990-N filing organization or because they were incorporated in 2022 or later and have yet to file full tax returns.

Table 4: Greater Boston's Women, Girls & Gender-Expansive (WGGE) Serving Organizations included in Analysis	
Criteria	Number of Orgs.
Total Organizations	941
Active Incorporated and/or last filing since 2022-2024	767
Not grantmaking (excluding 990-PF & NTEE <i>Philanthropy</i>)	730
With Form 990/990-EZ financial data	398
With reported revenue	388

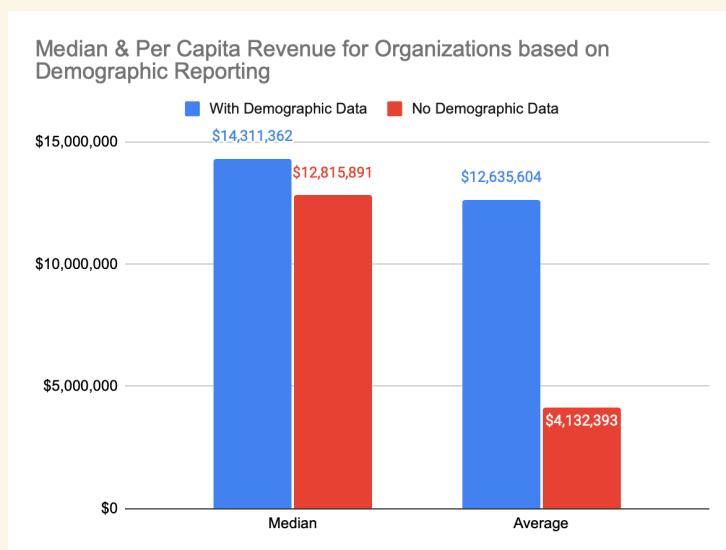
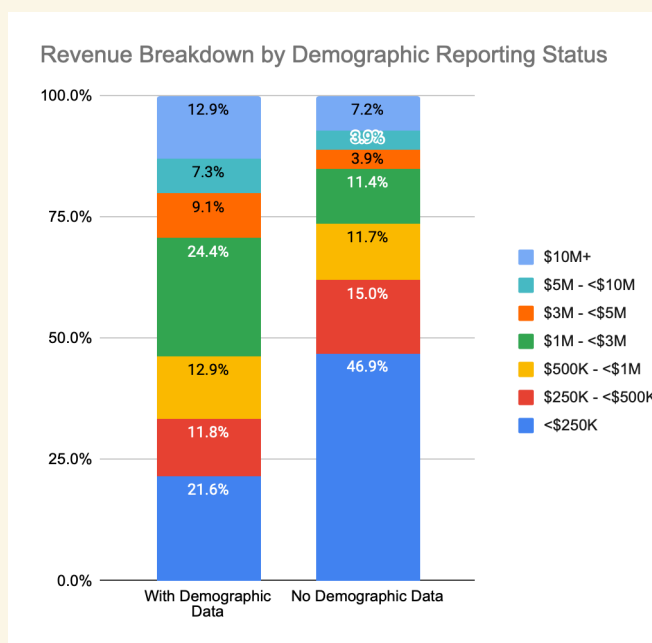
Nonprofit Organizations by Leader Demographics

Organizations were identified and classified by leader demographics using the [Demographics via Candid](#) data file as of September 2024 and updated as of February 2025. Because these demographic characteristics are self-reported by choice and offer flexibility in classification, such as open field self-reporting, there are some critical caveats that may impact both classification and analysis.

Sample size and reporting bias: 1,486 organizations—just 6.1% of Greater Boston’s eligible nonprofit sample (non-grantmaking, Form 990/990-EZ filers, recently active) — have provided demographic data for their board, leadership, and staff. Because such a small subset reports this information, there are important differences between organizations that do and do not provide demographic data, which may affect the quantitative analysis and interpretation of findings.

Reporting organizations are far less likely to be grassroots organizations. Among organizations reporting demographic data, 46% have annual revenue under \$1M, and 33% have annual revenue under \$500K. By comparison, among organizations that did not provide demographic data, 74% have annual revenue under \$1M, and 64% have annual revenue under \$500K. Additionally, organizations reporting demographic data tend to have larger budgets compared to organizations that did not report leader demographics: 13% of reporting organizations have revenue over \$10M, compared with 7% of non-reporting organizations (Chart 1).

Differences in central tendencies also illustrate this variability. Although median revenue is relatively similar for reporting and non-reporting organizations (\$14.3M vs. \$12.8M), average (per-organization) revenue diverges sharply: the mean revenue among reporting organizations is roughly three times higher than the mean for the full universe (Chart 2).



Demographic Classification Definitions: Because demographic data are self-reported there is little to no alignment with other demographic classifications. Candid allows for two-factor gender identity (1) male/female/nonbinary, 2) cisgender, transgender, another separate from sexual orientation, in addition to race/ethnic descriptors. As a result, there is flexibility in terms of defining leaders' intersectionality as well as understanding the financial indicators of the organizations they lead. Additionally, Candid allows for demographic data reporting for up to two leaders as well as null values, resulting in a diverse and inconsistent dataset.

Table 5: Candid Demographic Data Structure			
Category	Values	Leader 1	Leader 2
Gender 1	Male, Female, Non-binary, Other, No answer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender 2	Transgender, not transgender, another identity, no answer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual Orientation	Heterosexual, LGBTQ, no answer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Race	Multi-select, self-report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Preliminary Classification Approach: for the purposes of this analysis, organizations have been coded according to the following approach:

- **Race:** only leaders who identify as “white/caucasian” alone are classified as white; leaders with any other self-identified race or ethnicity are classified as BIPOC
- **Gender:** only leaders who identify as “Male” alone are classified as male; leaders who identify as female or non-binary, regardless of trans/cisgender identity, are classified as “women or gender-expansive” WGE
- **Sexual orientation:** only leaders who identify as Lesbian, Gay, Bisexual, Queer, or not Heterosexual are classified as “LGBQ” regardless of gender identity; leaders who only identify as Heterosexual are classified as such
- **Multi-Leaders:** data has been coded for race, gender, and sexual orientation to account for organizations with data for only one leader, one of two leaders, or two of two leaders so as to differentiate/account for cases where there may be different leadership structures and/or different data reporting, since not all organizations provide complete demographic data for all positions

Defining Racial/Ethnic Categories: due to the open field option, there is little standardization across categories and definitions. The following table indicates a full count of racial/ethnic descriptors included in Greater Boston’s demographic data:

Table 6: Race/Ethnicity Listed in Candid	Count
Afro-Latina	1
Asian/Asian American	93
Black/African American	205
Cape Verdean	1
Haitian American	1
Half East Indian	1
Hibernian American	1
Hispanic/Latino/Latina/Latinx	84
Indigenous-Buryat	1
Italian American	1
Jewish	1
Lebanese	1
Mexican American	1
Middle Eastern	4
Middle Eastern/North African	5
Middle-Eastern/Eastern European Jewish	1
Multi-Racial/Multi-Ethnic (2+ races/ethnicities)	64
Native American/American Indian/Alaska Native/Indigenous	8
Other person of color	1
Pakistani	1
Syrian American	1
White/African	1
White/Caucasian/European	1106

Grassroots Organizations

Our Grassroots Definition: There is no single standard definition of grassroots organizations, though the consensus prioritizes organizations based on mission and/or budget size. In this report, grassroots organizations are defined using a revenue-based proxy, with an annual operating budget of less than \$1 million, though many operate with less than \$500k. This threshold serves as a practical indicator of smaller, community-driven organizations that often embody grassroots characteristics, even when mission-based definitions vary across the field.

Other Commonly-Used Criteria for Defining Grassroots Organizations: The following are examples of operational criteria and budgetary thresholds that are commonly used to define grassroots organizations.

- 1) **Mission-Based Definition:** Grassroots organizations are often defined by their origins, leadership, and community orientation, not just their size. While grassroots organizations operate in diverse geographies, capacities, and models of governance, many are characterized by one or more of the following characteristics:
 - **Community-Driven:** Founded and led by members of the community they serve.
 - **Advocacy and Social Change:** Often prioritize social justice, advocacy, organizing, and systems change rather than primarily providing direct services.
 - **Constituency-Led:** Leadership and decision-making power rest with the people directly affected by the issues.
 - **Local Focus:** Serve specific neighborhoods, towns, cities, or regions rather than operating at a national or international scale.
 - **Participatory Practices:** Engage constituents directly in governance and strategic direction.

- 2) **Revenue-Based Definition:** Revenue size is often used as a practical **proxy** for identifying grassroots organizations, especially for grant eligibility or research purposes. Common thresholds include:

Revenue	Source or Usage Context
<\$500K	Many funders and research studies (e.g., Borealis Philanthropy, Movement Infrastructure Fund)
<\$1M	Common threshold for grassroots-focused funding programs (e.g., Ford Foundation's BUILD program for grassroots partners)
<\$2M	Sometimes used for broader definitions of small grassroots organizations, especially in national studies or networks like the Building Movement Project

<\$5M	Occasionally used, but typically for organizations serving very large communities with organizing missions
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The following table summarizes the characteristics and criteria utilized by select philanthropic entities in defining grassroots organizations:

Table 8: Philanthropic Definitions of Grassroots Organizations			
Organization/ Source	Revenue Threshold	Mission/Criteria Highlights	Notes
Grantmakers for Effective Organizations (GEO)	No limit	Created by, led by, and accountable to the community they serve; focused on social change and building community power	Emphasis on community governance and leadership
Building Movement Project	<\$1M	Organizations led by people of color, advocating for systemic change; grassroots/movement-based	Identifies racial funding disparities among grassroots groups
Borealis Philanthropy (Black-Led Movement Fund, etc.)	\$500K–\$1M	Supports community organizing and systemic change, particularly racial and social justice movements	Specific to movement-building; often early-stage organizations
Seeding Justice (formerly MRG Foundation)	<\$500K	Grassroots, community-led, advocating for systemic change, democratic governance	Also prioritizes organizations that struggle to access mainstream funding
Movement Strategy Center	No limit	Focus on transformative movement building; grassroots organizations rooted in communities	Defines grassroots based on organizing and community participation
Grassroots Grantmakers Network	No limit	Local, resident-led efforts that develop leadership and build civic engagement capacity	Focus on local civic empowerment

Ford Foundation (BUILD Initiative - grassroots stream)	<\$2M	Organizations advancing social justice with community-based leadership and a systemic change focus	Recognizes different levels of grassroots infrastructure (small to mid-sized)
New Venture Fund (Climate and Energy Equity Fund, etc.)	Under \$1M typically	Focus on grassroots community organizing and civic engagement, particularly for racial and economic justice	Grassroots defined both by scale and mission alignment

II – Grassroots Leader Focus Groups & Interviews

Prepared by: Center for Women in Politics & Public Policy, UMass Boston

Qualitative Data & Methods

The research team from UMass Boston's Center for Women in Politics and Public Policy sought to understand the organizational, financial, and leadership well-being of grassroots organizations led by and for women and gender-expansive leaders of color through the conduct of focus groups and interviews. Research commenced in August 2024 and ended in April 2025. Utilizing an intersectional, research justice, anti-racist approach, the research team was led by a woman of color and members of the team assisting in the conduct of focus groups and interviews were also women of color. The study design, including data analysis and interpretation, reflected best practices relating to conducting research on women and gender-expansive people of color.

Conceptual Framework: Intersectional, Anti-Racist, Research Justice Approach

The team drew upon several critical frameworks in all stages of research, explained here very briefly, followed by key sources for further exploration.

As explained earlier in the report, intersectionality is the concept that multiple identities (such as gender, sexuality, race/ethnicity, ability, and socioeconomic status) interact with one another within a context of connected systems and structures of power (such as laws, policies, and social norms), creating unique experiences of inequity and discrimination. These experiences are not simply the sum of each identity but a result of their specific intersection.

In addition to utilizing an intersectional research framework (see Ange-Marie Hancock's and Olena Hankivsky's sources below), the team took an intentional anti-racist approach and also utilized the research justice framework (see Andrew Jolivet source below). With an intersectional, anti-racist, research justice approach, the team sought to center community voices, challenge power structures in knowledge creation and legitimacy, and conduct research in partnership with communities of color.

What did this look like in practice? The team encouraged storytelling across identities rather than isolating variables. Interpretation of information collected was grounded in lived knowledge, not detached observation by a racially and ethnically diverse team. The team practiced shared leadership, humility, and reciprocity. Building on Andrew Jolivet's framework, knowledge was co-created rather than extracted. The team's anti-racist approach focused on systems, institutions, structures, and contexts to understand individual and collective experiences.

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Participant Sampling

The universe of potential participants was determined by a methodology based on several factors including, but not limited to, the organization's geographic location, annual operating budget, self-identified priority causes and populations, organizational focus and/or emphasis on addressing the needs of female and gender-expansive populations, and leadership characteristics, including women-led, BIPOC-led, and LGBTQ-led organizations.

The initial universe was generated using structured database extraction and refined through multi-source cross-reference validation and systematic de-duplication across funding networks and public demographic datasets, resulting in an initial sample size of 494 organizations. A weighted Composite Alignment Score Index (max score = 22) was then applied to operationalize a

multi-factor relevance ranking to measure strength of alignment with focus group recruitment criteria. The 494 organizations in the initial scored sample received Composite Alignment Scores ranging from 1 to 12 points. Of these, 165 organizations scoring 6 points or higher showed the strongest alignment with recruitment criteria and were prioritized for inclusion in focus groups. Additionally, 44 fiscally sponsored organizations or non-EIN entities were excluded from scoring and advanced for manual review.

The team developed a research protocol that allowed participants to choose between a focus group and an interview, as well as their preferred mode (in-person or remote). The protocol was reviewed by UMass Boston's Institutional Research Board (IRB), considered exempt, and received approval for the study to commence in August 2024. Several minor protocol modifications were made over the course of the data collection process, and the study was maintained as IRB exempt.

In collaboration with the quantitative lead researcher, an independent research consultant managing the broader research initiative on behalf of the Boston Women's Fund, the UMass Boston research team began with an outreach list of 100 organizational leaders, with a priority list of 75 for outreach and another list of 25 for second priority. The consultant generated the list based on the methodology outlined above (p. x) for target/sample universe.

Some organizations were removed from the outreach list for a range of reasons, including organizational location outside of Massachusetts, organizational size and budget, organizational leadership not identified as BIPOC or female or gender-expansive, and organization no longer in operation. Additionally, some leaders expressed no interest and asked to be removed from the outreach list.

Given the number of organizations taken off the outreach list in the initial stage of outreach, several more organizations were added to the list. In total, 111 organizations were included on an outreach list over the course of the study. All outreach was conducted in English, and several rounds of emails and phone follow-ups were completed.

Twenty-five leaders participated in the study as focus group or interview participants and the same content was covered in each modality. Participants selected what worked best for them, whether that was a focus group or an interview. The team began conducting focus groups in August 2024. Four focus groups were conducted (2 in person; 2 remote) with a total of 17 participants between August and September 2024. Individual interviews took place with a total of 8 participants. Most participants were persons of color leading small and medium-sized organizations in the Greater Boston area; please refer to details about organizational size in the quantitative section of this appendix. While most of the leaders have been with their organizations for over a decade, some have recently just taken up the mantle of leadership. They have been in the position of leadership for periods ranging from seven months to 10+ years. It is important to note that most data collection took place prior to the 2024 presidential election, and two interviews occurred after the election.

The table below provides a participation breakdown by data collection type and mode. An average of four individuals participated per focus group.

Table 9: Data Collection, Participant Breakdown by Type and Mode			
Type	Mode		Total
	<i>In-Person</i>	<i>Remote</i>	
<i>Interview</i>	2	6	8
<i>Focus Group</i>	10	7	17
<i>Total</i>	12	13	25

Data Collection

Focus groups lasted approximately 90 minutes in length, with the remote focus groups slightly shorter in length than in-person groups. Interviews lasted approximately 45-60 minutes in length. Given the sensitivity of the discussion and to encourage open dialogue, sessions were not recorded. Instead, detailed notes were taken. In some instances, paraphrasing was necessary, but every effort was made to ensure the accuracy of participants' perspectives in their own words. In addition, at strategic points in the interview and focus group sessions, researchers reflected back information being received to ensure accuracy and to try not to miss any pertinent details. Observations and field memos that capture context were used throughout the process to document nonverbal cues, participant interactions, such as similar or divergent perspectives, and broader sociopolitical dynamics.

The focus groups and interviews addressed four major domains, including (1) unmet needs of communities served, (2) organizational health, (3) leadership well-being, and (4) the philanthropic sector. The following table outlines the key questions asked in each domain.

Table 10: Focus Group Domains and Questions	
Domain	Questions
Unmet Needs of Communities	<p>What are the unmet needs facing women, girls, and gender-expansive people, particularly BIPOC, low-income, and most vulnerable in your community(s)?</p> <p>How might you describe the conditions faced by the community(s) you serve?</p> <p>Have the populations you focus on / serve changed over the last few years?</p> <p>What do you see as emerging challenges for the community(s) you serve?</p>

Organizational Health	<p>How is your organization faring? What words would best describe how your organization is doing? If you've been around for a few years, better or worse since 2020? To what extent do you see opportunities that will benefit your organization on the horizon?</p>
Leadership Well-Being	<p>What sustains you? What do you see as the most helpful sources of support? What do you draw on or lean on as you work? What kinds of support are missing? What do you most need in terms of support going forward? To what extent have you experienced burnout and if you have what has been its impacts? What does this look like?</p>
Philanthropic Sector	<p>What changes in the philanthropic sector do you think would help strengthen your organization? What changes in the philanthropic sector do you think would help strengthen you as a leader? What would you put on a wish list for the philanthropic sector?</p>

Following each focus group and interview, each organizational leader was asked to complete a supplemental online survey on organizational characteristics and needs, populations served, and capacity-building support and training needs. This survey was completed by 17 participants and used for contextual purposes in the analysis.

Data Coding and Analysis

The data from focus groups and interview data were open-coded and categorized into substantive themes. These themes were primarily descriptive, incorporating participant quotes or direct concepts from the data. The researchers continued this process until no new substantive themes emerged, confirming that they captured the full range of the participants' perspectives. The themes closely mirrored the original four domains of the focus group and interview questions, with additional themes emerging from the data. The researchers ensured inter-coder reliability through regular discussions and consensus-building to align interpretations and coding discussions. In some cases, they made inferences about themes by quantifying the occurrence of words and phrases associated with that particular domain. In alphabetical order, the domain findings are:

- § Board
- § Burnout
- § Growth
- § Leadership

- § Organizational Characteristics and Communities Served
- § Organizational Health
- § Philanthropic Sector: Experiences and Suggestions
- § Staff
- § Systems and Structures
- § Unmet Community Needs

The researchers drafted summaries for each domain, highlighting key findings, providing implicit interpretations, and a short discussion. As indicated earlier, guided by an anti-racist and intersectional approach, a team of women of color collected the data, working to honor the authenticity of perspectives and lived experiences shared. Therefore, analysis was conducted with a careful and nuanced approach to understanding how structures and systems perpetuate inequities, including a close examination of how racism operates and is experienced.

Reliability and Validity

While there were time constraints and technological barriers, particularly due to the nature of remote sessions conducted over Zoom, every effort was made to maintain engagement and minimize disruptions. Additionally, to account for potential biases in note-taking, the field memos were used to document reflections on data interpretation, ensuring that themes and insights remained grounded in participants' perspectives. These were triangulated between researchers to enhance understanding of participant experience and minimize researcher bias.

Response Validation

A webinar to solicit feedback on whether the team's preliminary analysis accurately reflected participant experiences and perspectives was held a few months after the interviews and focus groups. This provided an opportunity for participants to clarify, expand on, or correct any information, enhancing the credibility and validity of the results. Out of the 25 participants who were invited, eight participated in the process. The review of findings, presented by the same person who facilitated the interviews and focus groups, was presented through a closed webinar. Participants could engage via chat and a Q&A feature. Additionally, three questions were posed at periodic intervals to assess the extent to which the findings aligned with what the participants had shared.

The responses were measured on a Likert scale, ranging from "Definitely" to "Not at all," and the questions are listed below:

1. Recognizing that we are focused on high-level findings here, do our findings on Organizational Health align with what you shared as a participant in this study?
2. Do our findings on Leadership Well-being align with what you shared as a participant in this study?
3. Do our findings on Philanthropy align with what you shared as a participant in this study?

An additional question asking about the proposed dissemination approach for study findings was asked as well, with the responses measured on the same Likert scale:

4. Does our dissemination approach seem right?

Finally, the team asked leaders about other issues or concerns related to the topics addressed in the focus groups and interviews to be sure that nothing was missed. Following the webinar, a more interactive Zoom session was offered to participants for an opportunity for deeper discussion and clarification.

The team took input into account in the final summaries prepared for the Boston Women's Fund in April 2025.

III – Funder Interviews

Between August and October 2024, the research team conducted twelve structured, one-hour interviews with funders and technical assistance providers who were intentionally selected for their explicit focus on gender equity, racial equity, investment in grassroots leadership, and connection to the Greater Boston community.

This was a purposeful sample, not intended to be representative of the broader funding landscape, but designed to capture the insights and experiences of those working most directly with the report’s target populations — women, girls, and gender-expansive people of color, and the organizations that serve them.

Interviews were conducted virtually via Zoom and followed a structured protocol organized around four main themes:

1. **General Grantmaking Practices** – Foundations’ overall approach to grantmaking, how equity is embedded in their work, how they engage potential grantees, and the types of organizations and grants they prioritize or exclude.

Example prompts:

- How does equity fit into your approach to grantmaking?
- How do you engage potential grantees?
- What kinds of organizations or grants do you fund or avoid?

2. **Equity Practices** – How funders implement equity frameworks and assess impact; how equity priorities (target populations, places, issues) were identified and have evolved over time.
3. **Sector and Grassroots Support** – How funders define and support grassroots or early-stage organizations, and how they approach investment in leadership, particularly among women and gender-expansive leaders of color.

Prompts included discussions on:

- Leadership burnout and succession planning
- Emerging needs in women, girls, and gender-expansive communities
- Post-2020 changes in grassroots capacity and community needs

4. **Responding to Change** – How foundations adapted during and after the COVID-19 pandemic, including shifts toward flexible grantmaking, reduced reporting burdens, or broader funding criteria. Participants also reflected on how the national context around gender equity, racial justice, and the backlash to DEI has shaped their current grantmaking strategies.