



The Giving Common

An Initiative of the Boston Foundation

www.thegivingcommon.org

American Civil Liberties Union Foundation of Massachusetts



General Information

211 Congress Street, Suite 300
Boston, MA 02110
(617) 482-3170

Website

<http://www.aclum.org>

Organization Contact

Mary Jacobson development@aclum.org

Year of Incorporation

1920

Statements & Search Criteria

Mission Statement

The American Civil Liberties Union (ACLU) Foundation of Massachusetts is a private, voluntary, nonpartisan organization which works to protect and promote the individual rights and liberties guaranteed by the U.S. Constitution and the Massachusetts Declaration of Rights.

Using an "integrated advocacy" model combining litigation, education, communication, organizing and grassroots lobbying strategies, the ACLU Foundation of Massachusetts works on a wide range of civil liberties issues, including upholding the First Amendment, stopping unnecessary government surveillance, protecting the rights of immigrants, and so much more.

The ACLU never charges clients for legal representation, and does not accept government funding, in order to maintain absolute and unequivocal independence. We depend entirely on the support of individuals, families and foundations who care enough about the principles of liberty, justice, equality and democracy to make an investment in protecting them.

Background Statement

The American Civil Liberties Union (ACLU) is our nation's guardian of liberty, working daily in courts, legislatures and communities to defend and preserve the individual rights and liberties that the Constitution and laws of the United States guarantee everyone in this country.

The ACLU includes both 501(c)3 and 501(c)4 entities, and both national and state affiliate organizations. Most gifts to the ACLU – including grants made through the Boston Foundation – are split equally between the national organization and the state affiliate, unless the giver requests different sharing or specific earmarking.

This Giving Commons information pertains to the ACLU Foundation of Massachusetts, a 501(c)3 organization which focuses on litigation and public education strategies for protecting civil rights and liberties in Massachusetts. Again, absent a contrary request, gifts will be split equally with the national ACLU Foundation, with the "national" half of each gift used to protect civil rights and liberties on the national level and in all 50 states.

Impact Statement

Top accomplishments from past year:

- Won a landmark victory on the right of the people to monitor the government in *Glik v. Cunniffe*, concerning the right of citizens to record public officials in the performance of their duties.
- Protected free speech by winning an injunction to stop the enforcement of a law imposing severe restrictions on internet content.
- Won an important victory regarding the right of people to control their own genetic material in *Amato v. O'Keefe*, challenging the government's refusal to return a voluntarily-provided DNA sample by someone ruled out as a suspect.
- Protected privacy by helping secure the first vote in Mass. to reject federal funding for automatic license plate readers, a dangerous tracking technology.
- Organized to help make Massachusetts one of the only states in the nation to reject the adoption of the "Secure Communities" program aimed at targeting non-criminals for deportation.

Top goals for current year:

Liberty

- Limit the collection of personal information by the government and private corporations.
- Ensure that expressive, associational, and privacy rights are fully protected on the Internet.
- Oppose government interference in reproductive health care and end-of-life choices.

Justice

- Advocate for eliminating mandatory sentencing schemes and reforming punitive drug laws.
- End the 'school-to-prison pipeline' by rolling back zero tolerance policies that lead to students being excluded from/dropping out of school.

Equality

- Oppose efforts to restrict the rights and benefits of MA residents based on immigration status, national origin, or primary language.
- Advocate for racial justice.
- Defend the rights of the poor.

Democracy

- Limit government surveillance and subject it to public and judicial oversight.
- Protect free speech rights.
- Remove barriers making it difficult for people to exercise their right to vote.

Needs Statement

There are two key priority areas in which targeted fund-raising and strategic investments are critical to achieving the goals set forth in our five-year strategic plan; if underwritten, we intend to build a Technology & Liberty Project and an Equal Justice Project.

The goal of the Technology and Liberty Project would be to ensure that expressive, associational, and privacy rights are strengthened rather than compromised by new technology, and to protect these core liberties against intrusive corporate and government practices that rely on new technology to undermine basic rights. We propose investing \$334,000 in the coming year (and \$1,060,000 over three years).

The goal of the Equal Justice Project would be to ensure that equal protection and due process protections guaranteed by the Constitution and Declaration of Rights are extended to all people in the Commonwealth, regardless of race, ethnicity, religion, sexual orientation or gender identity. The initial focus of the Equal Justice Project will be racial justice, particularly closing down the school-to-prison pipeline, and the rights of immigrants. We propose a strategic investment of \$218,000 in FY13 and a three-year investment of \$996,000.

CEO/Executive Director Statement

This is a critical time for the defense of civil liberties and American democracy. As never before in our lifetimes, the foundation of our system of checks and balances is under siege both from systemic forces in our society and from those who would sacrifice essential liberty for political power and personal gain. Despite dramatic strides in critical civil liberties areas in the last decade – notably LGBT equality – we nonetheless have witnessed a rise of a national security state that threatens the foundation of our free and open society, with implications for generations to come. Its first targets are, as always, traditionally underserved communities of color, recent immigrants, poor people, and free thinkers.

The work of the ACLU has never been more important, and the ACLU of Massachusetts is uniquely poised to help lead and shape our collective response to these threats in the Commonwealth and nationwide. To do so, we must marshal and deploy our resources for maximum impact and effectiveness, not only this year but for the years ahead.

Service Categories

Civil Liberties

Geographic Areas Served

The ACLU of Massachusetts is headquartered in Boston, and also has permanent staff on the ground in central Massachusetts (Worcester) and western Massachusetts (Northampton), in order to ensure that we are able to protect and promote civil liberties across the entire state. And through our ground-breaking legal reform work and affiliation with the national ACLU, our impact is truly felt across the nation!

Please review online profile for full list of selected areas served.

Programs

Technology and Liberty Project

Description	The goal of the Technology and Liberty Project is to ensure that expressive, associational, and privacy rights are strengthened rather than compromised by new technology, and to protect these core liberties against intrusive corporate and government practices that rely on new technology to undermine basic rights.
Budget	334000
Category	Civil Rights, Social Action & Advocacy, General/Other
Population Served	General/Unspecified, ,
Program Short Term Success	
Program Long term Success	
Program Success Monitored By	
Examples of Program Success	

Equal Justice Project

Description	The goal of the Equal Justice Project is to ensure that equal protection and due process protections guaranteed by the Constitution and Declaration of Rights are extended to all people in the Commonwealth, regardless of race, ethnicity, religion, sexual orientation, or gender identity. The initial focus of the Equal Justice Project will be racial justice, particularly closing down the school-to-prison pipeline and the rights of immigrants.
Budget	218000
Category	Civil Rights, Social Action & Advocacy, General/Other
Population Served	Minorities, ,
Program Short Term Success	
Program Long term Success	
Program Success Monitored By	
Examples of Program Success	

Program Comments

CEO Comments

Over the last two years, the ACLU of Massachusetts Board of Directors and Trustees have worked in collaboration with the professional staff to set advocacy priorities in four key areas: Liberty (privacy, government surveillance, and protection for personal autonomy); Democracy (voters' rights, freedom of speech, government transparency); Justice (police practices and over-incarceration); and Equality (racial, gender, immigrant, and LGBTQ rights, and rights of the poor). This broad advocacy agenda will continue to guide our integrated advocacy work in the

coming year.

In addition, national and statewide elections this year offer a unique opportunity for the ACLU to mobilize its membership to influence the political conversation at both the state and national level. As non-partisan defenders of core constitutional principles, the ACLU is positioned to offer a powerful platform to influence the public debate across the political spectrum at a time when people are paying attention. To that end, our annual budget includes the launch of a “Liberty 2012 Campaign” to keep civil rights and civil liberties high on the public agenda in the year ahead. We will work with the national ACLU to build and roll out a range of public education, social media, and field initiatives to ensure that a broad array of civil right and civil liberties issues are part of the 2012 election campaign throughout Massachusetts.

Management

CEO/Executive Director

Executive Director Ms. Carol V. Rose
Term Start Jan 2003
Email crose@aclum.org

Experience

Carol Rose is the Executive Director of the ACLU of Massachusetts, a non-profit organization with more than 22,000 members in Massachusetts (and approaching 500,000 nationwide), which is dedicated to defending liberty of Americans and realizing the protections set forth in the Bill of Rights. Prior to earning her law degree, Carol was a reporter for United Press International, the *Des Moines Register*, and the *New York Times*, with reporting stints in Washington D.C. as well as Pakistan, Japan, Sri Lanka, Israel, the West Bank and Gaza, Northern Ireland, and Vietnam. After law school, she worked at the Boston law firm of Hill & Barlow, where she specialized in First Amendment, IP, Internet and media law. She is a graduate of Stanford University (BA), the London School of Economics (MSc), and Harvard Law School (JD).

You can read her blog, "On Liberty," at boston.com or aclum.org.

Former CEOs

Name	Term
Luther Macnair	1943 - 1968
John Roberts	1968 - 2002

Senior Staff

Matthew Segal

Title Legal Director

Experience/Biography

Sarah Wunsch

Title Senior Staff Attorney

Experience/Biography

Ann Lambert

Title Legislative Director

Experience/Biography

Nancy Murray

Title Director of Public Education

Experience/Biography

Shirley Lai**Title** Director of Finance and Administration**Experience/Biography****Chris Ott****Title** Communications Director**Experience/Biography****Steve Hurley****Title** Director of Development**Experience/Biography****Staff Information**

Full Time Staff	18
Part Time Staff	2
Volunteers	11
Contractors	3

Staff Demographics - Ethnicity

African American/Black	1
Asian American/Pacific Islander	3
Caucasian	15
Hispanic/Latino	3
Native American/American Indian	1
Other	0 0

Staff Demographics - Gender

Male	7
Female	16
Unspecified	0

Formal Evaluations

CEO Formal Evaluation	Yes
CEO/Executive Formal Evaluation Frequency	Semi-Annually
Senior Management Formal Evaluation	Yes
Senior Management Formal Evaluation Frequency	Annually

NonManagement Formal Evaluation	Yes
Non Management Formal Evaluation Frequency	Annually

Plans & Policies

Organization has a Fundraising Plan?	Under Development
Organization has a Strategic Plan?	Under Development
Management Succession Plan?	Under Development
Organization Policy and Procedures	Yes
Nondiscrimination Policy	Yes
Whistleblower Policy	No
Document Destruction Policy	No
Registration	No
Permit?	Yes

Board & Governance

Board Chair

Board Chair	Mr. Ronald M. Ansin
Company Affiliation	Retired
Term	Apr 2011 to Mar 2012
Email	rmahrvd@aol.com

Board Members

Name	Affiliation	Status
Mr. Ron Ansin	Retired	Voting
Mr. Joshua S. Boger	Vertex	Voting
Mr. Martin M. Fantozzi	Goulston and Storrs	Voting
Ms. Ellen Fisher	Retired	Voting
Ms. Holly Gunner	Community Volunteer	Voting
Mr. Jeffrey Jones	Edwards Angell Palmer and Dodge LLP	Voting
Ms. Maria Manning	EMC	Voting
Ms. Kim V. Marrkand	Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C.	Voting
Ms. Leslie Shapiro	Bingham McCutchen LLP	Voting
Mr. David Squire	Retired	Voting
Mr. Steven F. Young	Eastern Bank	Voting

Board Demographics - Ethnicity

African American/Black	1
Asian American/Pacific Islander	0
Caucasian	10
Hispanic/Latino	0
Native American/American Indian	0
Other	0 0

Board Demographics - Gender

Male	6
Female	5
Unspecified	0

Board Information

Board Term Lengths	1
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Number of Full Board Meetings Annually	5
Board Meeting Attendance %	90%
Written Board Selection Criteria?	Yes
Written Conflict of Interest Policy?	Yes
Percentage Making Monetary Contributions	
Constituency Includes Client Representation	No

Standing Committees

Investment

Nominating

Financials

Fiscal Year

Fiscal Year Start	Apr 01, 2011
Fiscal Year End	Mar 31, 2012
Projected Revenue	\$2,598,000.00
Projected Expenses	\$2,976,000.00
Endowment?	Yes
Endowment Value	\$1322188.00
Spending Policy	Percentage
Percentage	4%
Credit Line?	No
Reserve Fund?	Yes
Months Reserve Fund Covers	0

Detailed Financials

Revenue and Expenses

Fiscal Year	2012	2011	2010
Total Revenue	\$2,079,018	\$3,803,187	\$3,019,983
Total Expenses	\$2,164,215	\$1,823,688	\$1,521,992

Revenue Sources

Fiscal Year	2012	2011	2010
Foundation and Corporation Contributions	\$61,500	\$48,000	\$107,353
Government Contributions	\$0	\$0	\$0
Federal	--	--	--
State	--	--	--
Local	--	--	--
Unspecified	--	--	--
Individual Contributions	\$1,485,833	\$3,096,849	\$2,709,347
Indirect Public Support	--	--	--
Earned Revenue	--	--	--
Investment Income, Net of Losses	\$91,318	\$252,625	\$53,126
Membership Dues	--	--	--
Special Events	\$308,030	\$344,196	\$127,755
Revenue In-Kind	\$46,560	\$8,197	\$6,984
Other	\$85,777	\$53,320	\$15,418

Expense Allocation

Fiscal Year	2012	2011	2010
Program Expense	\$1,290,336	\$985,922	\$856,282
Administration Expense	\$309,771	\$309,266	\$264,997
Fundraising Expense	\$564,108	\$528,500	\$400,713
Payments to Affiliates	--	\$0	\$0
Total Revenue/Total Expenses	0.96	2.09	1.98
Program Expense/Total Expenses	60%	54%	56%
Fundraising Expense/Contributed Revenue	30%	15%	14%

Assets and Liabilities

Fiscal Year	2012	2011	2010
Total Assets	\$6,949,389	\$6,158,813	\$4,511,716
Current Assets	\$579,792	\$1,442,111	\$2,365,727
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$195,329	\$211,808	\$544,210
Total Net Assets	\$6,754,060	\$5,947,005	\$3,967,506

Short Term Solvency

Fiscal Year	2012	2011	2010
Current Ratio: Current Assets/Current Liabilities	2.97	6.81	4.35

Long Term Solvency

Fiscal Year	2012	2011	2010
Long-Term Liabilities/Total Assets	0%	0%	0%

Top Funding Sources

Fiscal Year	2012	2011	2010
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

Capital Campaign

Currently in a Capital Campaign?	No
Capital Campaign Anticipated in Next 5 Years?	No

Comments

Foundation Staff Comments

Financial summary data in charts and graphs are per the organization's audited financials.