

Active partners

In 2014 we continued to see the benefits of creative thinking and nontraditional approaches to philanthropy –tax credits, impact investing, funder collaboration, social entrepreneurship, and sustained, venture-type funding for promising initiatives. Many of the funders we work with have adopted a portfolio approach to grantmaking, working in a variety of ways with different types of nonprofits, stakeholders, and other funders. They are testing ideas, investing in potential, and building on proven performance.

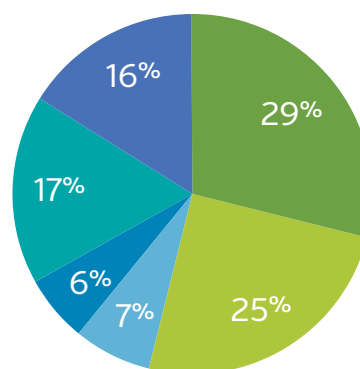
Effective grantmaking moves beyond the transaction and evaluation metrics, however, to a shared vision for the future and supportive relationships to realize goals together.

As advisors and grantmakers, GMA's team listens to donors and trustees to identify where they are in their philanthropic lives, to chart the best course of action together. There are no right answers in grantmaking, but there are best practices and opportune moments to make a sustained difference. Attuned to our clients' goals and to the fields in which they fund, we promote honest conversation, careful analysis, and confident decision making.



Sailors' Snug Harbor of Boston used the Community Investment Tax Credit to double its support of the Cape Cod Fisheries Trust's business programs for local fishermen and shellfishermen like Clint Austin of Wellfleet (photo).

Focused Giving



**GMA CLIENTS
GRANTS BY FOCUS AREA
\$37,025,220**

- Education
- Human Services
- Environment
- Arts & Humanity
- Civic Engagement
- Health

GMA CLIENTS BY THE NUMBERS

40 grantmakers | 1,750 grants | \$21,100 average grant | \$1.2 billion combined assets | \$32 million assets on average

Customized Services

GMA helps funders establish and realize their philanthropic goals with a full range of services tailored to meet their needs.

GRANTMAKING

Mission and strategy
Community needs analysis
Program development
Proposal review
Site visits and funder briefings
Evaluation and learning

ADMINISTRATION & FINANCIAL MANAGEMENT

Point of contact
Program administration
Meeting and report preparation
Bookkeeping and record keeping
Budgets and payout forecasts
Financial statements

ADVISING

Board governance
Succession and transition advice
Leadership development
Start-up assistance
Staff and trustee training
Retreats and workshops

Grantmaker Profile: Narrowing focus for greater impact

With the scheduled sunset of the **Jessie B. Cox Charitable Trust** approaching in 2017, GMA worked with Family Grants Committee members to assess their preferences, scan the philanthropic landscape, and identify a satisfying course for the Trust's final years. A leading funder in the fields of health, education, and the environment in New England, the Cox Trust aimed to zero in on ground-breaking ideas with potential for lasting regional impact. Now in progress, its final projects exemplify the potential of innovative ideas for large-scale replication and impact beyond the life of the Trust.

Building a network to accelerate conservation

More than 80 percent of land in New England is privately held, and development is a real threat to wildlife habitats. Despite property owners' interest in protecting land through conservation easements, they are often deterred by high transaction costs. Small local land trusts lack the capacity to respond to this obstacle.

The Cox Trust is focused on extending the reach of land trusts through Regional Conservation Partnerships. These innovative networks of like-minded organizations work to protect whole landscapes with conservation easements. The Trust's Legacy Program both defrays owners' transaction costs and strengthens targeted RCPs, thus protecting large, significant areas and fostering a culture of conservation in the region.

Investing in the universal pre-K movement

Despite rapidly growing demand for universal access for 3- and 4-year olds to high quality pre-K, systems are not in place to meet this need. In New England, the separation between local school districts and early childcare providers means that only one in two children has access to such early learning opportunities.

The Cox Trust is investing in public-private partnerships like The Permanent Fund for Vermont's Children, a collaborative whose efforts led to a law requiring that all school districts offer preschool education. The Trust is now helping to make that law a reality with grants to partnerships that will help providers throughout the state of Vermont and the city of Boston become qualified preschool programs for public funding.

Testing breakthrough ideas with proven healthcare providers

Systemic barriers to high quality healthcare are a significant challenge for low-income, rural, and immigrant populations throughout New England. Innovative solutions are being tested at community health centers across the region, and the Cox Trust has chosen to invest in these efforts.

One grantee, Community Health Center, Inc., is building a needed interface between primary care and medical specialties. Its eConsult system uses secure technology to expedite advisory reviews by off-site specialists. If successful at sites across Maine and Connecticut, the program will result in rapid specialty support, fewer in-person referrals, and enhanced patient records.

