

Reviewing Your Geographic Commitment

Ten ideas to consider when reviewing the need for change

1. **Take the initiative**

If you think there should be a grantmaking review, take leadership among your co-trustees. Determine the best approach for discussion and decision making.

2. **Agree on a process**

Develop consensus on a process that everyone understands, commits to, and participates in. Make sure all trustees have a voice. Incorporate a discussion of donor legacy in your process.

3. **Do your research**

Learn as much as you can about the needs of the community, the interests of the trustees, and the capacity and appetite for change. Focus on actual knowledge versus assumed information.

4. **Take advantage of outside resources, expertise or advice**

Connect with colleagues to hear their experiences; seek advice from peers, professional staff and consultants. Borrow from techniques that others have used successfully.

5. **Listen to important constituencies**

Your grantees, applicants and key community members can serve as resources. They will be eager to contribute their thoughts.

6. **Develop a plan and a timeline**

Don't rush the process, be deliberate. It may take many months or more than a year to gather all the appropriate facts, ideas and opinions, arrive at a consensus, and implement your plan.

7. **Consider how to honor exceptions**

If the consensus is to change the geographic focus of grantmaking, consider allowing concerned trustees to continue their former grantmaking patterns through discretionary grants or special initiatives.

8. **Put yourself in your grantees' shoes to understand impact of change**

Clearly articulate your intentions and reasons for change. Make sure your board speaks with one voice. If exit strategies are needed, consider implementing them over several years.

9. **Consider roles for the foundation beyond grantmaking**

Foundations can serve as catalysts for change and spark innovation by convening grantees, experts, public officials and others to address community needs. Foundations can offer direct assistance to grantees by deploying experts to assist them with organizational and operating challenges.

10. **Monitor the success of your changes**

Whether the foundation decides to retain its geographic focus or disperse its grants over a wider geography, the board will need to monitor the implementation of its decision and make appropriate tweaks as needed to ensure success.

***Mary Phillips** is a founding director and President of **GMA Foundations**, a firm that works with private donors to transform their aspirations into effective philanthropic programs. GMA has provided grantmaking, management and advisory services to foundations since 1982. Mary leads consulting services at GMA, specializing in program design and assessment, planning for transitions, governance structure, trustee orientation, retreat planning and facilitation, foundation start-up services, and foundation management.*

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