



Report

To Clients and Community



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GMA CLIENTS SERVED

President's Letter

There is an eager student in all of us at GMA Foundations. We thrive on the learning that enlivens and advances our profession. Each year we meet new donors with generous spirits and creative energy. We enjoy learning about organizations with new ideas and better ways of maximizing charitable dollars to solve social, educational and environmental challenges.

In 2009, with the recession reducing our client foundations' aggregate grantmaking by \$5 million, we placed a new focus on collaboration and learned that sensible partnerships produce results. GMA staff increased their efforts to produce more education programs for our donors and colleagues and reached out further to involve nonprofits in informative exchange. Our learning sessions offered opportunities to share information on evaluation, youth violence prevention and other timely issues. The GMA open houses enabled dozens of nonprofit representatives to learn about our client foundation priorities and new grantmaking strategies.

Through these opportunities and in our day-to-day work with foundations throughout the country, GMA serves as a bridge or perhaps more of a learning highway of ideas, lessons learned and success stories for our donors and their grantees and applicants. At the same time, our staff members are continuously becoming better grantmakers, managers and advisors.

We begin 2010 with fresh optimism as assets recover. New money combined with new ideas and collaborative approaches will provide a fertile field for philanthropists. Learning to meet challenges is part of what we are honored to do every day as grantmakers. We hope there will be fewer adverse challenges in 2010, particularly in disaster grantmaking, but we are prepared and determined to take them on.



*GMA Foundations Directors
Phil Hall, Mary Phillips, Prentice Zinn,
Pamela Labonte Maksy*

Mary Phillips
March 2010

Grantmaking Highlights

GMA clients are active in many fields of interest, including human services, the arts, health, the environment, conservation and education. Inner-city youth, immigrants and women and girls are among the populations specifically targeted by some foundations. Our clients' grants reach communities throughout the United States and extend to the developing world.

Partnerships produce results in education grants

In Boston, the **Charles Hayden Foundation** provided major expansion support to Boston College for Boston Connects, which utilizes school staff and community-based agencies to provide preventive services to children in order to reduce academic failure. Seed-funded by Hayden in 2001, the program now serves over 4,200 students in 14 schools. Its partnership with the Boston Public Schools and use of shared data has led to significant improvements in academic achievement, attendance, decreases in negative behavior and has reduced special education referrals. Considerable cost savings to the district are anticipated.



Photo: Gary Wayne Gilbert

Boston Connects at the Quincy School



Learning about navigation at Community Boating in Providence, RI

The **Jessie B. Cox Charitable Lead Trust** joined national funders to support the Rhode Island Afterschool Plus Alliance, a statewide effort to align out-of-school providers with urban public schools. Cox also supported the Bradford Dunn Institute's promising early literacy program in three Ocean State cities, and the innovative Kids First Rhode Island Farm to School Project, which introduces fresh produce to school lunches in every school district in the state.



Farmer trading cards connect kids to farmers



An **anonymous family charitable trust** provided key support to The Homewood Children's Village, a local initiative seeking to adapt the widely-acclaimed Harlem Children's Zone model to a distressed neighborhood in Pittsburgh. Both the Pittsburgh Public Schools and the Allegheny County Human Services Department are collaborating with the project, whose initial leadership supporter was the Richard King Mellon Foundation.

Consulting Highlights

Independent and family foundations turn to GMA when they seek experienced consultants to help them overcome roadblocks or address time-consuming issues that go beyond their current day-to-day operations. We provide strategic and practical solutions working with board and staff. We improve cross-generational and intra-generational effectiveness, help to clarify and implement a foundation's mission and establish strong governance procedures. We convene board retreats to achieve a higher level of involvement, improve communication and create teambuilding cohesion.

The Joseph and Harvey Meyerhoff Family Charitable Funds, a group of distinguished Baltimore-based family foundations, sought GMA's help with development of a succession plan to involve the family's next generation in the work of the funds. GMA's president Mary Phillips organized a three-generation committee, facilitated a planning process, and conducted a day-long retreat which culminated in a plan that was enthusiastically embraced by all.



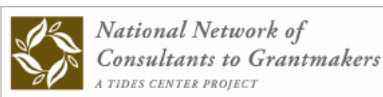
Similarly, when the **Judy Family Foundation** of Chicago wanted to ensure that the legacy of its founders continues in succeeding generations, GMA engaged family members in review and discussion of legacy, mission and governance. Through personal interviews we articulated a framework for discussion at a productive planning committee retreat. A second retreat for the board concluded with agreements by family members on a newly defined mission statement, a revised grant review procedure, and a governance structure that appealed to all three generations of the family.



Protecting the Nashua River Watershed

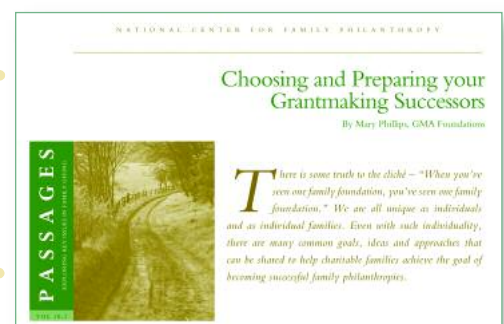
Some individuals and families distribute their charitable giving through community foundations but seek GMA's advice in evaluating grant applications. One fund at a local community foundation takes advantage of our knowledge base to review grants in the areas of arts, historic preservation, and the environment in the Nashoba Valley and North Shore of Massachusetts.

The National Center for Family Philanthropy developed a research-based tool to help family foundations identify areas and ways in which they can improve their functioning and impact. Amy Segal Shorey, GMA program director for several on-going client foundations and a member of our consulting team, has been trained and certified by the NCFP's Pursuit of Excellence Program to use this valuable new instrument.



Mary Phillips served as chair of the Programs and Services Task Force of the **National Network of Consultants to Grantmakers**. Task Force members organized webinars on topics of interest to professionals such as governance succession, diversity in philanthropy, using social network tools and advising grantmakers dealing with limited resources.

Mary Phillips' article, "Choosing and Preparing your Grantmaking Successors," is a Passages publication of the National Center for Family Philanthropy.



Special Initiatives

Collaboration

In 2009, GMA continued to provide clients with opportunities to collaborate with other funders to share what they have learned from the successes and failures of projects they have supported, to form coalitions to address pressing social needs and to maximize limited resources.



GMA clients, **the Herman and Frieda L. Miller Foundation**, the **Mabel Louise Riley Foundation** and the **Theodore Edson Parker Foundation** are among local funders participating in the Massachusetts Census Equity Fund, a two-year effort to ensure an accurate count for the U.S. Census in poor and traditionally undercounted areas. In Massachusetts, the census count is estimated to influence distribution of \$9.6 billion in government aid to towns and cities, for an average of \$1,500 per person.

Skilled in program review and evaluation, GMA staff serve as volunteer proposal reviewers and advisors for several funder collaboratives and special initiatives such as:

Charles E. Shannon, Jr. Community Safety Initiative, a state grant program to prevent gang and youth violence; the **Saffron Circle**, addressing needs of the Asian community in Greater Boston; the **Social Innovation Forum**, vetting and providing resources to organizations meeting social needs, the **Fund for the Arts**, supporting artworks that engage community organizations and the **United Way of Massachusetts Bay and Merrimack Valley**.

Associated Grant Makers is a regional association of well over a hundred foundations and corporations with giving programs. It serves as a hub of information and engagement for funders and grantseekers. Facing a leadership change, the board, chaired by GMA's president Mary Phillips, reviewed the organization's mission, developed a strategic plan, and established criteria for selection of a new executive director.



Decorative shutters draw attention to artists' studios in Boston's Fort Point



United Way Healthy Child Development Program

Learning

Throughout the year, GMA held funder briefings for our staff, clients and the larger community. Local experts led a discussion on the economic downturn and its effect on the nonprofit sector. We learned about the movement to help



Brian O'Connell, Charles Desmond, Mass. Board of Higher Education, David Magnani, Mass. Nonprofit Network



Chaletta Huertas, GMA, Maureen Jerz, Horizons for Homeless Children, Sarah Schnable, City Year

low-income individuals build assets and the important role that youth-originated media can play in creating and maintaining positive self-images. The series also included a program on evaluating the effectiveness of youth programming and a conversation with Brian O'Connell, a champion of public service and founder of the influential Independent Sector.

Financial Services

Financial management is a vital component of GMA's core services. We work with investment managers and accountants and supplement their work with our specialized knowledge of the nonprofit sector. We ensure that our trustees remain capable fiduciaries and keep them informed of legislative actions and developments in the field of philanthropy.

Through donations, product sales, and vibrant community fundraising festivals held throughout the United States, the **Life is Good Kids Foundation** raises funds to support charities that create a positive and lasting impact on children facing extraordinary challenges. Our financial team processes the foundation's accounts receivable and accounts payable, prepares monthly financial reports, and maintains accurate accounting records for the foundation's auditors.



Seeking to find more economical ways to handle administrative tasks, the directors of the 103-year-old **Grenfell Association of America** asked GMA to analyze the foundation's administrative expenses in order to maximize funds available for grants. The Grenfell Association of America subsequently retained GMA to provide the foundation with fund accounting, bookkeeping and financial reporting services and to assist their independent accountants in the preparation of their tax return. GMA also provides administrative support services to coordinate meetings and to record minutes.



Maple Sugar Shack at PFEEC

When the **Prescott Farm Environmental Education Center (PFEEC)**, located in Laconia, NH, needed help during a transition in management, GMA's financial services manager assumed the duties of chief financial officer. This assignment included paying invoices, handling employment and benefits administration, and physical plant oversight. Prescott Farm is a program of the Prescott Conservancy, Inc., which was established by the Samuel P. Pardoe Foundation, a long-time GMA client supporting organizations that serve the communities of the New Hampshire Lakes Region.

Administrative Services

With our customized approach, we tailor services to meet each client's needs. GMA staff handle all the required record keeping that comes with charitable giving including maintaining files and processing acknowledgements and reports.

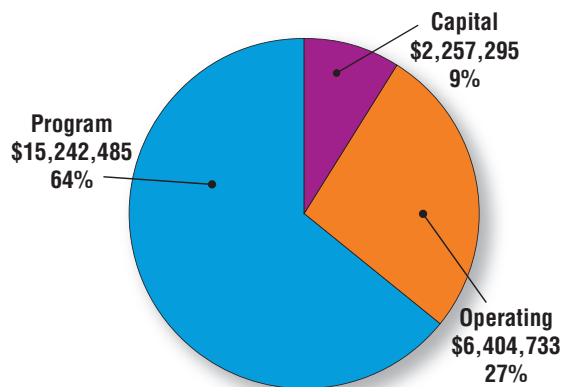
The richness of our collegial culture derives, in part, from the presence of several private foundations that share space within our downtown Boston offices. Individual trustees from the **Ludcke Foundation**, the **Clipper Ship Foundation**, the **Discount Foundation**, and the **Mabel Louise Riley Foundation** find it convenient and cost-effective to avail themselves of GMA staff as needed for certain functions and specific projects.



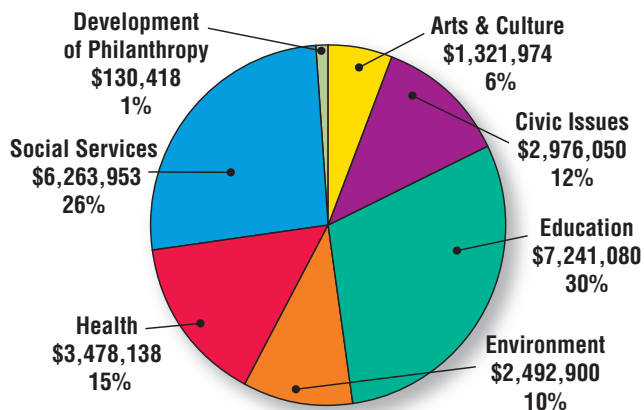
Lauren Tulp, GMA Foundation Assistant and Henry Allen, Executive Director, Discount Foundation

GMA By The Numbers

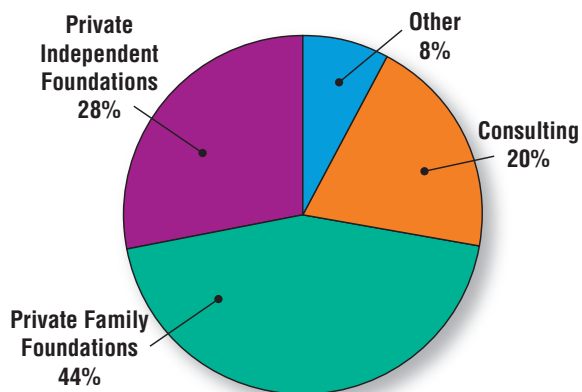
Total Grants \$23,904,513
Dollars Granted by Grant Type



Total Grants \$23,904,513
Dollars Granted by Focus Area



GMA Client Mix



CLIENTS SERVED IN FY 2009

- Anonymous Family Charitable Trust
- The Aaron Foundation
- Bruce J. Anderson Foundation
- Boston Education Funders
- Virginia Wellington Cabot Foundation
- Chinese University of Hong Kong Foundation, Inc.
- Clipper Ship Foundation
- The Clowes Fund
- Conservation, Food & Health Foundation
- Jessie B. Cox Charitable Lead Trust
- The Dickler Family Foundation
- The Discount Foundation
- The Dolphin Trust
- East Hill Foundation
- Families of Wealth Seminar
- The Foley Hoag Foundation
- The Friendship Fund
- Grenfell Association of America
- George P. Haseotes and Polyxeni T. Haseotes Philia Family Charitable Foundation
- Charles Hayden Foundation
- Judy Family Foundation
- The Lalor Foundation
- Life is Good Kids Foundation
- The Linden Foundation
- Ludcke Foundation
- Massachusetts 2020, Inc.
- Stephen J. Meoli Memorial Foundation
- Joseph and Harvey Meyerhoff Family Charitable Funds
- Herman and Frieda L. Miller Foundation
- Morgan Family Foundation
- Needmor Fund
- NLT Foundation
- The Samuel P. Pardoe Foundation
- The Theodore Edson Parker Foundation
- The Physicians Foundation
- Howard and Geraldine Polinger Family Foundation
- Prescott Conservancy, Inc.
- The Sidney and Esther Rabb Charitable Foundation
- The Sidney R. Rabb Charitable Trust
- A. C. Ratschesky Foundation
- Mabel Louise Riley Foundation
- Rogers Family Foundation
- Roxbury Community College Foundation
- Rutland Corner Foundation
- Sailors' Snug Harbor of Boston
- The William E. Schrafft and Bertha E. Schrafft Charitable Trust
- Sociological Initiatives Foundation
- The Anna B. Stearns Charitable Foundation
- Tanne Foundation
- Edwin S. Webster Foundation
- Yulin Yao Family Foundation

GMA STAFF

Margaret Carr
Kirstie David
Newell Flather, *Founder*

Susan Haff
Philip Hall
Chaletta Huertas
Michelle Lamarre Jenney
Tracy Little

Brianna Lloyd
Pamela Labonte Maksy
Mary Nicosia
Mary Phillips, *President*
Yasmin Shah

Amy Segal Shorey
Gracelaw Simmons
Joel Springer
Lauren Tulp
Prentice Zinn

GMA Foundations

77 Summer Street, Suite 800
Boston, Massachusetts 02110-1006
617/426-7080
www.gmafoundations.com