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To Clients and Community



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CLIENTS SERVED

President's Letter

Dear Friends and Colleagues:

We are privileged to work with some of the most generous people in the world as they work towards the highest ideals in education, healthcare, social justice, environmental protection, social services, and in the arts and culture. Here at GMA, we revel in the passion and commitment enthusiastically shared by both our philanthropist clients and the outstanding nonprofit organizations they fund.

From our perspective, philanthropic leadership is thriving in America. Our wealthiest families are partnering with remarkable individuals and organizations dedicated to serving the most under-resourced among us. Together these leaders represent the best of our country – a place in which people from all backgrounds, experience levels and resources can work together to build a better world.

The great majority of 2011 grants from GMA clients were directed to low-income people. In the field of education, our clients have invested generously in high-achieving inner-city charter, independent and district schools. In addition to direct support, these foundations made substantial investments in early literacy, after-school and summer enrichment, college access and retention, and the recruitment of new teaching talent.

In a year remarkable for political dysfunction, GMA client foundations funded ordinary people's grassroots efforts that are models of democracy. In healthcare, where the national debate has been harshly polarized, GMA clients have funded innovative projects to ensure broader access while lowering costs. In the environment, we have seen exciting movements to preserve large-scale regions of forest while honoring the rights of landowners. In the arts, where so many organizations have struggled through the recession, we have witnessed the expansion of important cultural institutions and acclaimed community-based arts organizations.

Though the inequalities in today's world may seem insurmountable, the people we worked with in 2011 believe wholeheartedly in ensuring that all people have the opportunity to live healthy, meaningful lives. The challenges are substantial. It has been our joy to witness and support effective philanthropy, where dedicated foundations and nonprofits strive tirelessly to overcome the odds and create a better world.



Mary Phillips
March 2012

Distinctive Grantmaking

“Since 1982 GMA has worked with private foundations on all aspects of grantmaking – from setting strategy to mailing the checks. We offer our clients unparalleled field experience, in-depth knowledge and flexibility in tailoring our services to meet their needs. Highlights of a year in grantmaking tell the story of a community working together to achieve its highest ideals.”

Phil Hall, GMA Foundations Principal and Director of Grantmaking Quality

Social Entrepreneurship

Committed to the long-term preservation of New England's unique environmental resources and large scale landscapes, the board of the **Jessie B. Cox Trust** awarded *1% for the Planet* a multi-year grant to grow its global network of businesses that donate one percent of their sales to environmental causes worldwide. Their shared goal is to foster innovative models of collaboration between New England companies and nonprofits to generate long-term environmental and business benefits. As a 35-year charitable lead trust, the Jessie B. Cox Trust will conclude its grantmaking in 2017. With this grant, the board has embraced an innovative strategy to ensure a legacy in environmental grantmaking for years to come.



Courtesy of The Physicians Foundation



Innovation

The Physicians Foundation examines the challenges to delivering high-quality healthcare to all Americans. Addressing the adequacy of the physician workforce, the foundation awarded a grant of nearly \$750,000 to the University of North Carolina at Chapel Hill to create a web-based open-source model that will estimate the number of working physicians within a set geography and specialty. The model will compare physician availability to the demands and needs of a given population, and analyze the impact of policy changes and market forces on the workforce. This unprecedented, transparent tool promises to provide widespread access to valuable data at the core of developing practical and targeted solutions to physician shortages.

The **Clipper Ship Foundation** funds a wide range of human service organizations in the Greater Boston area with over 150 program and operating grants averaging \$9,000 each. In an effort to accelerate the foundation's impact, the Clipper Ship trustees began making large targeted grants for the first time this year. Through its *Strategic Grants Initiative*, the foundation identified top-performing grantee organizations and invited them to address their own strategic initiatives by applying for one-time capital grants of \$50,000 to \$100,000. These inaugural capital grants to EMH Recovery, Food for Free and Mission of Deeds resulted in an immediate expansion of services to the region's neediest people.



Courtesy of Food for Free

Capital

The Theodore Edson Parker Foundation concluded a \$300,000 commitment to the Lowell Community Health Center for its new facility. The health center is recognized as one of the strongest in the state, serving as the primary care provider for 40,000 residents, including substantial Southeast Asian, Latino and African immigrant populations. The new center will add another 100 workers to its payroll and expand its capacity to serve 50,000 people, nearly half the population of Lowell. GMA Foundations staff members serve as the Parker Foundation's representatives in Lowell, engaging in important public sector conversations involving the health and education of that city's residents.



Courtesy of the Lowell Community Health Center

GMA serves as Boston program staff for the **Charles Hayden Foundation**, which distributes \$15 million annually in Boston and New York. Last year, the foundation invested nearly 40 percent of its Boston education grants in the expansion of charter schools via operating grants and unique capital opportunities. An exception to its moratorium on capital support, these capital funds are available for strategic use by high-achieving charter schools, to deliver quality education to more Boston children. Through flexible support for charter schools, the foundation lives its mission of supporting schools with a demonstrated ability to graduate economically disadvantaged students, prepared to succeed in high-performing colleges and universities.

Courtesy of the Neighborhood House Charter School



Outreach & Engagement

GMA Foundations encouraged the **Herman and Frieda Miller Foundation** to include in its portfolio grants that support organizational development and worked with the trustees to create the *Innovation Fund for Civic Engagement*. The foundation typically provides operating support to organizations involved in community and political affairs in the Greater Boston area. Recognizing that advocacy organizations often need resources to "leap forward" to develop bigger and bolder networks and alliances, or to carry out experimental programs, the family board started a separate fund. The *Innovation Fund* is designed to foster new ideas, tools, and practices that help organizations and their allies improve civic engagement and advocacy.

Listening is at the core of good grantmaking at GMA, and our client foundations are active listeners. The **Anna Lalor Burdick Program of the Lalor Foundation** hosted representatives of fifteen grantee organizations from as far away as Hawaii and as close as Boston for a two-day conference addressing teen pregnancy prevention. Grantees, trustees, and GMA staff left energized by their exchange. Locally, the **A.C. Ratschky Foundation** convened practitioners in the field of parent education for a conversation about their most pressing issues. These types of meetings are invaluable in maintaining the alignment between a foundation's direction and the needs of the field.



Fresno Barrios Unidos poster

Model Governance

Family Engagement

The **George B. Storer Foundation** of Jackson, Wyoming wanted to integrate its fourth-generation members into the work of the foundation. GMA designed and led a fun and informative Next Generation Retreat for five family members and the foundation's staff. At the end of the day, fourth-generation members reported that they were energized and enthusiastic about the roles they could play in the foundation's future. GMA consultants offer clarity, insight and creativity in addressing challenges to effective governance.



Trustees of the NLT Foundation, Lucy Rosborough and Nellie Taft, with GMA's Prentice Zinn and Michelle Jenney (right) at a trustee learning session

Trustee Training

The new trustees of the **Baldwin Family Foundation** wanted to learn more about the grants they were making. GMA developed a site visit program for the trustees that reflected their foundation's mission, individual interest areas, and engagement styles. During a pre-visit workshop, we outlined a report for each of the sites. After three days of site visits, the trustees met with GMA to evaluate their experiences and identify how a site visit program could be incorporated into their grantmaking.

Executive Coaching

Foundations are sometimes led by volunteer staff or family staff taking on new roles. GMA serves as a resource to volunteer and paid staff leaders who seek orientation and training as well as an ongoing expert advisor to serve as a sounding board and guide on executive decisions and grantmaking compliance. "I think of GMA as my belt and suspenders," quips the executive director of the **Virginia Wellington Cabot Foundation**.



GMA's Phil Hall with Skye Kramer of First Literacy

Trustee Resource

Foundation trustees rely on GMA's staff as a resource for best practices in all areas of management and governance. We monitor

and report on regulations and legislation affecting private foundations across the country, such as current legislation proposed by the Massachusetts Attorney General that would prohibit director compensation for those serving on nonprofit boards. Through constant and direct conversation with nonprofit leaders, grant recipients and trustees from a robust group of foundations, GMA staff stay abreast of trends in philanthropy and guide clients in maximizing their impact.



Brooke Couch Freeland, Janelle Woods-McNish, Susan Musinsky and Tony Howland at a foundation lunch discussion

Creating Effective Philanthropy

“Philanthropy is about more than good grantmaking. Effective foundations need strong infrastructure and experienced, well-resourced advisors to support their governance, management and operations. We see decreasing concerns about function and increasing joys about giving.”

Mary Phillips, GMA Foundations President

In 2011 GMA partnered with 50 different individual and organizational donors as managers, advisors, and facilitators. We offer foundation trustees and staff individualized attention, extensive knowledge and insight, and flexibility in tailoring our resources to meet their needs. Over 80 percent of GMA's clients use more than one of our services as part of a strong infrastructure for creating their own effective philanthropy.

Grantmaking

- Strategy development and review
- Proposal review and analysis
- Communications and grantee relations
- Site visits and funder briefings
- Monitoring, evaluation and reporting

Managing: Financial & Administrative Services

- Grants management
 - Electronic application portal
 - Customized processes
- Bookkeeping
- Financial statements
- Budget and cash flow analysis
- Office management
- Trustee fiduciary support
- Management of transitions

Advising: Short- and Long-Term Consultation

- Mission
- Governance
- Family succession
- Leadership development
- Executive coaching
- Start-up assistance
- Staff and trustee training
- Feasibility and community needs studies

Officer helps several clients manage the timing of their qualifying distributions with an eye towards minimizing the foundation's annual excise tax or utilizing excess distribution balances to help preserve the foundation's assets.

Strong Operations

Financial and Administrative Services

Foundations puzzling over how to handle the various bookkeeping and compliance issues that keep them awake at night come to GMA for both financial and administrative services. Using a strong team approach, GMA works to deliver a package of services that blends seamlessly into a foundation's comprehensive management plan.

Foundations usually begin using GMA's bookkeeping support and frequently add other services as needs arise or as their boards come to depend on our expertise. In 2011, **the Beveridge Family Foundation** hired GMA for bookkeeping and soon entrusted our team with drafting the foundation's financial statements for audit, and with presenting financial reports at their board meetings. Along the way, we helped streamline their operations by creating a budgeting template linked to their accounting system. The board's president now turns to GMA for an experienced viewpoint on a range of financial management matters.

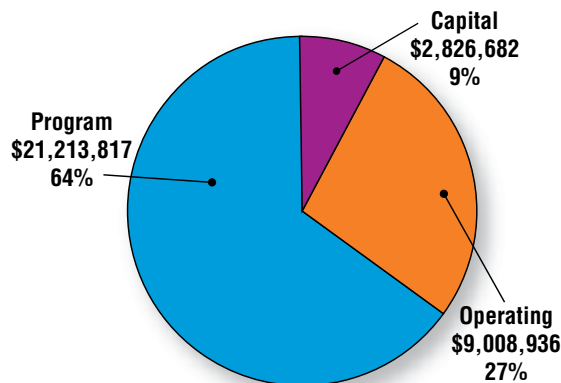
GMA is also a valuable resource for foundations making strategic financial decisions. Our Chief Financial



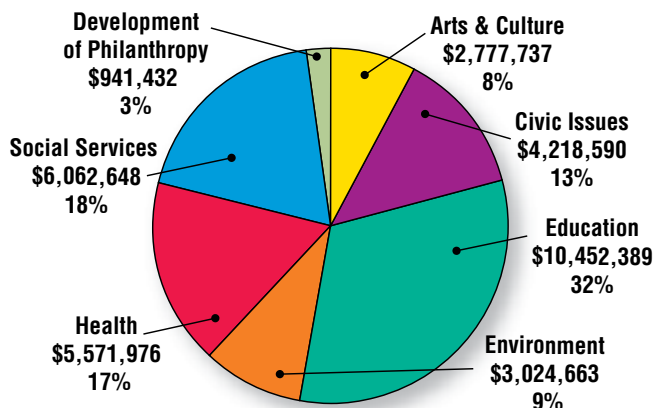
The annual Wheel Walk at Stanley Park, a Beveridge Family Foundation grantee in Westfield, Massachusetts.

GMA By The Numbers

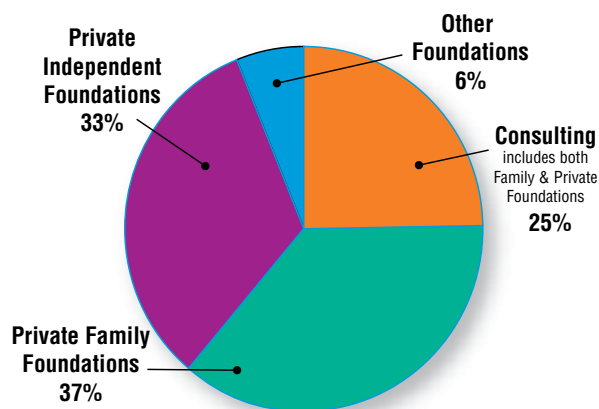
Total Grants \$33,049,435
Grants by Grant Type



Total Grants \$33,049,435
Grants by Focus Area



GMA Client Mix



CLIENTS SERVED IN FY 2011

- The Aaron Foundation
- Bruce J. Anderson Foundation
- Anonymous Corporate Foundation
- Anonymous Family Foundation
- The Susan A. and Donald P. Babson Charitable Foundation
- Alfred Baldwin Foundation
- The Beveridge Family Foundation, Inc.
- Boston Education Funders
- Virginia Wellington Cabot Foundation
- The Patrick Carney Foundation
- The Cedar Tree 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 Discount Foundation
- The Dolphin Trust
- The Foley Hoag Foundation
- The Friendship Fund
- Grenfell Association of America
- Charles Hayden Foundation
- The Lalor Foundation
- Life is good Kids Foundation
- The Linden Foundation
- Ludcke Foundation
- Stephen J. Meoli Memorial Foundation
- Herman and Frieda L. Miller Foundation
- The Vincent Mulford Foundation
- Needmor Fund
- NLT Foundation
- The Samuel P. Pardoe Foundation
- The Theodore Edson Parker Foundation
- Amelia Peabody Charitable Fund
- 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
- George B. Storer Foundation
- Tanne Foundation
- Edwin S. Webster Foundation
- Yulin Yao Family Foundation

GMA STAFF

Mary Ann Blackmur
Kirstie David
Newell Flather, *Founder*
Kathryn Fyrberg

Susan Haff
Phil Hall
Chaletta Huertas
Michelle Lamarre Jenney
Brianna Lloyd

Pamela Labonte Maksy
Mary Nicosia
Mary Phillips, *President*
Maureen Reed-McNally
Amy Segal Shorey

Gracelaw Simmons
Judy Sneath
Joel Springer
Ruth Victorin
Prentice Zinn

GMA Foundations

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