

# ASSOCIATED GRANT MAKERS



## REPORT TO *the community* 2004-2005



Associated Grant Makers  
advancing effective and responsible philanthropy

## *agm core values*

**EXCELLENCE** • Adhering to the highest standards in the delivery of services and products

**INCLUSIVENESS & DIVERSITY** • Encouraging participation and seeking a variety of perspectives

**LEADERSHIP & INNOVATION** • Initiating and fostering ingenuity

**KNOWLEDGE SHARING** • Connecting people with each other and with information

## *agm mission*

To support the practice and expansion of effective philanthropic giving. AGM is a community of foundation staff and trustees, corporate grant makers, donors and philanthropic advisory services that builds a connection with nonprofit leaders. AGM supports its Members working together to increase their individual and collective impact and effectiveness. We foster a neutral environment for interaction and collaboration towards the exchange of knowledge and information, educational and professional development to advance and increase awareness of the field of philanthropy.

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Ron Ancrum,  
AGM President



Katherine McHugh,  
Chair, Board of Directors

*We are proud of the central role AGM played in advancing philanthropy in the region, and we see many new opportunities ahead.*

## ❖ Dear Readers,

*We are delighted to present to you our annual report for 2004-2005. As you will see when you review the pages that follow, AGM has been active in serving the needs of our members for education, information, and opportunities to connect to one another. In addition, we have represented the philanthropic sector throughout the region. We have demonstrated our sector's civic leadership, reviewing and monitoring proposed laws and regulations that affect our work, and in helping the media, business leaders and others to understand the key role played by philanthropic leaders in the region.*

Whether hosting the Massachusetts Assistant Attorney General Jamie Katz in a public forum to discuss accountability of nonprofit organizations before his office filed proposed legislation addressing that subject, or convening small private, independent and family foundations to learn together about philanthropic subjects of their own choosing, AGM is the only organization in Massachusetts or New Hampshire whose sole purpose is to represent and inform the sector.

We are proud of the central role AGM played in advancing philanthropy in the region, and we see many new opportunities ahead. Legislation to increase accountability and oversight of nonprofit organizations by Massachusetts will be considered later in 2005, and AGM will be there. Our Public Policy Committee has already reviewed and commented on the bill, and the AGM board has endorsed it. If passed, AGM will be leading the effort to inform both foundations and other nonprofit organizations about its contents. We will continue to provide information, resources, and educational opportunities that are responsive to our Members' needs, and we will

continue to build on the tremendous value of AGM's role as convener, offering our Members structured opportunities to meet with colleagues, learn from experts, and be prepared for new issues and challenges before they emerge.

Working together over the past two years as chair and president of this wonderful organization has been terrific. We wish to thank the board of directors for their diligence, the staff for all their hard work, the donors for supporting our mission, and the many professional colleagues who help to affirm the multiple reasons why AGM is as vital to the region today as it was when it began.

Ron Ancrum, President

Katherine McHugh, Chair, Board of Directors



## ❖ SERVING MEMBERS, *-serving the community*

*As a regional association, Associated Grant Makers exists to provide service to our Members, the grant makers in Massachusetts and New Hampshire. Members value the learning derived from a program discussion on a topic consistent with their foundation's granting interest or from a professional convening that helps them network with other colleagues. We serve as a conduit between the nonprofit organizations that participate in our programs and the grant makers that seek to better communicate their grant making guidelines. We seek to be the voice that represents the broad grant making community in the region and the conscience for effective and responsible philanthropy.*

In 2001, AGM developed a business plan to reposition us into the future. This led to six major strategic goals to strengthen the organization. Since then, we have continued to refine those goals and develop more ideas to further our commitment to building a stronger product platform and improve Member services. This past year, we can cite many examples of how AGM has been successful in its endeavor to serve the philanthropic community.

Membership growth has been steadily going upwards every year. The use of various communication technology tools has enhanced our delivery of information services and communications to all our constituents. After a few years of deficit spending, we have restructured our financial management systems to greatly improve our financial stability with back-to-back operating surpluses and increases in the fund balance. Our marketing materials and website have a new design and participation in programs has increased. Overall, we believe things have changed to better serve our Members.

AGM is clearly viewed as a valuable resource to the nonprofit sector. In addition to our workshops and programs, we are actively involved in helping to promote a strong nonprofit sector. AGM provides grants to Management Consulting Services in Boston and the Human Service Forum in Springfield through the Nonprofit Effectiveness Fund. We support the Executive Transitions Program that offers services to organizations undergoing a transition of the nonprofit's executive leadership. We also participate in the dialogue by the Nonprofit Strategy Group to position the nonprofit sector strongly in order to improve its public image and understanding and to increase the sector's clout.

Finally, as AGM has taken steps to change its business model. We have a staff very committed to providing quality service and developing our systems to be more effective and efficient. We are a very diverse staff, with an array of skills and expertise to accomplish our goals.



*AGM has played a valuable, supportive role in our foundation work.*



## ❖ GRANT MAKER *members*

*AGM continued to support its grant making Members through a blend of programming and services that included presentations of national and local research on emerging issues and philanthropic practice, opportunities for affinity groups to share perspectives across similar organizations, and skill-building workshops for grant maker staff.*

### **2004 New England Funders Conference**

The 2004 New England Funders Conference drew approximately 135 grant makers and funders from 7 states and featured a keynote address by Ralph R. Smith, Senior Vice President of the Annie E. Casey Foundation, who challenged conference attendees to be more effective, transparent and accountable in their grant making practices. A plenary panel moderated by Marcia Sharp of Millennium Communications, and comprised of Dr. Blenda Wilson, and Stewart Hudson, Executive Director of the Emily Hall Tremain Foundation engaged the audience in a discussion of “Finding New Potential with a Regional Lens.” The presenters described the potential of foundation giving in New England, how it differs from the rest of the country and between states, and posed the question of how we ignite more collaboration across the region. A total of 14 workshop sessions were offered over the two days on topics that included ethics, funder responsibility, grant making practice, best practices, and communications.

### **Public Policy**

The last two years have been marked by an intense federal and local scrutiny of the nonprofit sector and a rapidly changing landscape of legislative and regulatory proposals that could significantly impact the grant makers and nonprofits alike.

AGM has responded to this environment by developing a separate section of our website dedicated to public policy information and resources to provide up-to-date information to our Members about emerging bills, proposals and public policy discussions. In addition, the AGM Public Policy Committee meets regularly to discuss current issues.

In 2004, the Senate Finance Committee requested that the Independent Sector convene a national panel to advise the Committee on issues related to improving governance and operations in nonprofits. The Interim Report of the Panel on the Nonprofit Sector was one of the key nonprofit public policy reports of 2005. In April, the Board voted to have AGM sign on in support of the Panel’s recommendations.

In May 2005, the Massachusetts Attorney General introduced an “Act to Promote the Financial Integrity of Public Charities” (which includes foundations). The AGM Board voted to endorse this proposed legislation, as well as forward to the Attorney General suggestions for training and implementation.

Finally, AGM continues to host public policy dialogues with key local officials such as the May 2005 session with Douglas Foy, Secretary of the Office of Commonwealth Development.

## Member Highlights

**Perspectives on Grant Making,** Phil Buchanan, Center for Effective Philanthropy; Francie Ostrower, Urban Institute; and Rick Cohen, National Committee for Responsive Philanthropy. This session showcased innovative research on grant making practices and trends, including an assessment for the effectiveness of grant making practices of conservative versus progressive foundation effectiveness; and ways in which foundations are using grantee feedback to assess their own effectiveness.

**Immigrant Worker Centers,** Dr. Janice Fine. Immigrant worker centers are emerging as a key supports for newly arrived workers; yet they are typically underfunded and not always well connected to formal public support networks. This presented the results of her national study of these vital organizations, and provided specific suggestions on how funders could best support the work and growth of these centers.

**On-going roundtable discussions** for three affinity groups: Small, private, independent and family foundations; corporate foundations and giving programs; and, community foundations. These sessions provided opportunities for similar organizations to share best practices and concerns in an informal learning environment.

A skill-building workshop on **How to Read and Interpret Grantee Financial Statements,** Joel Aronson, CPA. This workshop provided hands-on learning for grant makers on how to assess grantee financial statements for a variety of key indicators.

*highlights 2004-2005*





## AGMConnect.org: Behind the Login

The AGM website has undergone dramatic changes and enhancements in the last year. Our new website features articles about current topics in philanthropy, a public policy section tracking developments at the state and federal levels, and an event calendar that includes online registration for most AGM programs.

### Other Benefits Include:

#### Grant Maker Member Resources

- The Family Philanthropy Online Knowledge Center, a searchable database of over 700 articles and resources of interest to families that give.
- Archives of the InfoNet (the AGM biweekly e-news bulletin) and Members Update (the quarterly e-newsletter).
- The online catalog of the RCP.
- A searchable Members Directory with contact information for all active AGM Members.
- A Professional Experts database listing consultants who have been recommended by other AGM Members for services such as board development, executive searches, and facilitation.
- A listing of open Requests for Proposals. As a member benefit you may post to this listing.

#### Nonprofit Partner Program Resources

- An online, searchable version of the AGM Grant Makers Directory, which is updated in real time as Grant Makers update their information.
- A listing of open Requests for Proposals both locally & nationally.
- The online catalog of the RCP.
- An archive of the Partners Update, a quarterly e-newsletter.

## ❖ RESOURCE CENTER FOR PHILANTHROPY and member communications

*In 2004-2005, AGM sustained our commitment to explore ways to best serve our Members and nonprofit Partners through the Resource Center for Philanthropy and our Member communications vehicles. We began an important information technology and database upgrade process that will continue in 2005-2006, but had immediate benefits for key services, including the Grant Makers Directory and the AGM website [www.agmconnect.org](http://www.agmconnect.org).*

The Janet C. Taylor Resource Center for Philanthropy (RCP) continues to be one of AGM resources most widely used by our Members and Partners. To further enhance our customers' experience, several key changes and enhancements were made in the past year. These included removing older, outdated materials from the collection, and adding several new journal titles such as Family Foundation Advisor, Environmental Grantmakers, Livable Communities@Work, Funding for Private Schools, Nonprofit Board Report, and Women's Philanthropy Institute News. We also now subscribe to Foundation Center's Grants for Individuals database which is accessible via the Resource Center's workstations. Thanks to a generous grant from the C.F. Adams Charitable Trust, AGM's grant making Members now have access to Family Philanthropy Online onsite as well as via our website. Finally, the RCP orientation sessions were updated to include a stronger focus on online research.

The AGM Grant Makers Directory database received an extreme makeover as part of the initial phases of the technology upgrades. In addition to producing the

Directory – which gives philanthropic organizations in Massachusetts and New Hampshire an opportunity to describe their grant making areas of interest and grant requirements – directly from the new database, we significantly enhanced the search interface for the Directory's database, adding features such as an advanced search capacity allowing users to combine or eliminate search criteria, the ability to save searches for later, and a feature that allows for printing or emailing search results.

AGM has collaborated with seven other public, college and foundation libraries to offer the Grant Makers Directory Database to their patrons. We hope to expand our collaboration in other areas such as collection development, knowledge sharing, and training.

Throughout 2004-2005 we looked for ways to improve our Member newsletters – the bi-weekly InfoNet, and quarterly Members Update. We updated the format of each publication, and continued to expand the sources of information we use for links, articles and resources.

*highlights 2004-2005*





“ Currently, more than 900 organizations and individuals receive benefits through AGM Partnership. ”

## ❖ NONPROFIT PARTNERS program

*Through AGM's Nonprofit Partners Program, grant seekers and consultants have an opportunity to network with leaders from the nonprofit, corporate giving, and foundation community, receive discounts on a variety of programming hosted by AGM and other nonprofit support agencies, and access resources and knowledge that support the fund development process. Currently, more than 900 organizations and individuals receive benefits through AGM Partnership.*

AGM continued its commitment to supporting emerging grant seekers and strengthening the capacity of nonprofit organizations through our traditional programming and some newly designed workshops that focused on the fund development process, and current technology solutions.

The 2004 Nonprofit Partners Meeting, *The Voice of the Nonprofit Sector*, drew more than 75 nonprofit organizations and consultants from throughout Massachusetts. This half-day conference featured a morning address by Ron Ancrum on the state of philanthropy, and an afternoon plenary led by Audrey Alvarado, Executive Director, National Council of Nonprofit Associations. This event included sessions on Funds through Community Development Block Grants, Cause-Related Marketing, and Making the Most of the Money You Raise.

## Programming and Workshop Highlights

**Proposal Writing and Budgeting.** These sessions give a brief overview of resources and materials available in the RCP, tips on writing a proposal and developing the proposal budget, and explore where program attendees are in this process and possible next steps.

**Engaging Your Board in Fundraising.** This new workshop includes an overview of fundraising principles; a description of the roles and responsibilities of a board in fund development; tips for how board members can build relationships between donor prospects and nonprofits; and how nonprofit staff can best support board members in building donor relationships.

**Effectively Communicating your Organization.** Another new program, this highlights key areas of a marketing plan that best inform the communications process, particularly the brand. In addition, the session describes what branding is, the elements of a strong brand and how to build your brand.

**Preparing your Form 990.** This presentation gave an overview of the functions of the Form 990 tax return. Particular emphasis was placed on the hot spots for potential donors and funders, sections that tend to be scrutinized by the IRS, areas the public typically looks at, and insight into other information that should be included in a 990.

**Tech Series.** Understanding that effectively integrating technology into daily activities is essential to a nonprofit's ability to achieve its mission, this series was designed to help nonprofit development officers and communications professionals navigate this realm successfully. Series topics included: Donor Databases in Review, Communicating your Nonprofit Through the Web, and Encourage Giving and Improve Fundraising Performance.

**Meet the Donors.** Meet the Donors programming is designed to take nonprofit representatives beyond the guidelines of foundations and corporate giving programs to understand funding priorities and how these priorities were established, how funding decisions are made, and the process of applying for charitable support. AGM's last two sessions, Civic Engagement and Disability Funders drew more than 100 nonprofit representatives.

highlights 2004-2005





### Summer Fund Initiatives

The **Educational Initiative** supports camps to provide services that address the “whole child” while building on academic programming capacity. Components in 2004 included:

- The Books-in-Bulk project to provide each camp with copies of every book on the Boston Public School’s summer reading list in their library. In 2004, the Summer Fund distributed over 1,326 books to 48 camps.
- The Outstanding Volunteer Grant awarded to five camps to hire their best school-year volunteer to develop and run educational programming at their summer camps.
- The Summer Fund Institute to provide training that supports the specific and unique needs of urban as well as rural camps. Using the expertise of our grantees and respected experts from the field, the Summer Fund produces an event that fosters the professionalism and knowledge necessary for administrators and staff to administer quality programs.

Complemented by generous support and donations from the cultural and corporate and foundational communities, the **Cultural Day Initiative** has exposed inner-city youth to the rich cultural tradition in Boston. In 2004 over 10,000 children and adults participated in programs provided by 22 Boston-area cultural institutions through the Cultural Day initiative.

The **Homeless Campership Fund**, entering its 16th year, continues to be a vital resource for camps, shelters, and most importantly, homeless families. In 2004, the Homeless Campership Fund distributed \$93,680 (a 44% increase from 2003) to 26 organizations providing 651 weeks of camp to 190 youth.

### ❖ SUMMER fund

*The Summer Fund is a donor collaborative that enables donors to creatively leverage dollars by participating in an equitable funding process to support and strengthen over 90 summer camps and programs. The camps supported through this initiative offer various activities that are inclusive for all children (ages 6-18) including homeless children and children with physical and emotional disabilities.*

In 2004, the Summer Fund donor collaborative raised and distributed \$1.1 million in operational support to 74 organizations managing 96 summer camps for children from Boston, Cambridge, Somerville, and Chelsea. Collectively these camps served over 10,800 youth. Additionally, the Summer Fund raised over \$165,000 to support Cultural Day, the Homeless Campership Fund, and the Educational Initiative.

#### Summer Fund Initiatives

The Summer Fund has set a goal of \$1.5 million in 2005, positioning the fund to reach \$2 million by 2007. More information about the Summer Fund is available at [www.summerfund.org](http://www.summerfund.org).



“*The Summer Fund’s impact is a crucial, time saving process which helps in the planning, provides training at the Summer Institute, and makes us feel like a much larger community of providers.* – Chinatown Community Center”



## ❖ GIVING *network*

*This past year, the Giving Network continued its transformation from a grant-funded initiative into the regular activities of the association. The programs and resources are to promote philanthropy, with special focus on various audiences. This year, we continued to collaborate with other organizations to provide learning and networking opportunities.*

### **Business Building Stronger**

**Communities** is a publication developed in collaboration with the Boston Business Journal, The Boston Foundation, The Philanthropic Initiative, and United Way of Massachusetts Bay. The contents provide a useful tool kit for businesses interested in building a successful charitable giving program. Profiles of a select group of small to medium companies, such as Wainwright Bank, J. Jill, Harpoon Brewery, and Grand Circle Travel, were included along with tips and resources to assist in enhancing a giving program or getting started. Copies were distributed as a supplement to the September 17-23 issue of the BBJ and at the October 1 Business Networking Breakfast event held at the Omni Parker House. Attended by over 200 people from businesses,

foundations and nonprofits, the breakfast featured Ira Jackson as the keynote speaker, former President of BankBoston, who co-authored “Profits With Principles.” The panel included Donna Latson Gittens, causemedia, inc., Robert Glassman of Wainwright Bank, Kevin McCall of Paradigm Properties, and Elizabeth Callanan, from The Mathworks, Inc.

AGM was among the list of organizations to host the second **New England Conference on Black Philanthropy** held in New Haven, Connecticut. Over 300 participants throughout the region and across the country attended the event in June 2004. Ron Ancrum, served on the Coordinating Committee, presented on a workshop panel, and introduced the luncheon speaker, Marian Heard, now

past President and CEO of United Way of Massachusetts Bay.

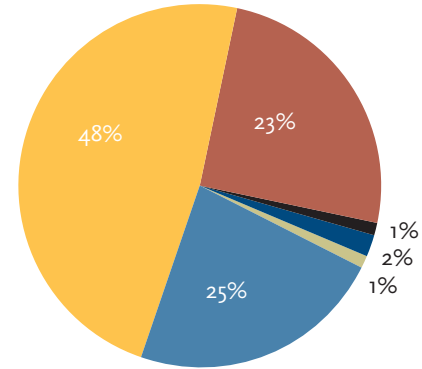
AGM was among the regional associations connected to a new online resource **Giving Circles Knowledge Center**. The Giving Network has always provided support and information to groups of donors interested in forming a giving circle. A new report released by the New Ventures in Philanthropy Initiative of the Forum of Regional Associations of Grant makers, described giving circles in Massachusetts, such as Hestia Fund and Daily Muses.

A long overdue report on **Giving in Massachusetts** was compiled and released in May 2005. It provided giving data from 2002 on individual donors, foundations (private and community), corporate giving and grant making charities. This report discusses the level of generosity of our donors, the strength of foundation grants among the New England states, and the major growth of new foundations between 1999 and 2003.



## FINANCIALS 2004-2005

The Total Operating Revenue and Expenses do not include Summer Fund or Nonprofit Effectiveness Fund programs.

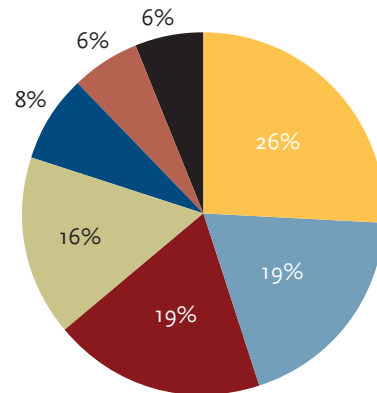


### AGM FINANCIAL BALANCE SHEET

Current Assets	\$639,127
Fixed Assets	\$40,803
Fiscal Agent	\$77,923
Other	\$43,100
<b>Total Assets</b>	<b>\$800,953</b>
Current Liabilities	\$18,068
Fiscal Agent Payable	\$77,923
Capital Lease	\$8,239
<b>Total Liabilities</b>	<b>\$104,230</b>
<b>Unrestricted Net Assets</b>	
Operating	\$248,515
Fixed Assets	\$29,355
Board Designated (NEF)	\$233,588
<b>Temporarily Restricted</b>	
Summer Fund	\$55,265
Deferred Income	\$130,000
<b>Total Net Assets</b>	<b>\$696,723</b>

### TOTAL OPERATING REVENUE \$1,009,373

- Member Dues 48%
- Grants & Contributions 23%
- Publications 1%
- Donated Services 2%
- Interest Income 1%
- Program Fees & Other Income 25%



### TOTAL OPERATING EXPENSES \$994,995

- General Administration 26%
- Program Services 19%
- Library/Info Services 19%
- Marketing 16%
- Giving Network 6%
- Summer Fund Administrative 6%
- AGM Connect 8%

## AGM wishes to thank

the following donors for their generous grants and gifts:

Anonymous  
Bingham McCutchen  
The Boston Foundation  
C.F. Adams Charitable Trust  
Fleet Bank  
Hemenway and Barnes  
Hill, Holliday, Connors,  
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## We acknowledge the following

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*advancing effective and  
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