

# The NMAG Journal

*A newsletter for the members of the  
New Mexico Association of Grantmakers*

Spring 2009

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[www.nmag.org](http://www.nmag.org)

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**Steve Simon, Executive Director  
Ronald Simon Family Foundation**

### *Reflections on Extraordinary Times*

So much has happened over the last several months that have virtually changed the landscape in which we're all living and I have the deepest sense that it no longer will be business as usual. The year 2008 ended with collapses in both the equity and credit markets as well as the election of America's first Afro-American President. These are monumental events that will continue to impact our lives for the foreseeable future. Combine these events with the challenges the planet is facing with the impacts of global warming and it becomes obvious that we have our work cut out for us.

In my discussions with my friends, family and colleagues there is a sense of vulnerability amongst them that I have never before encountered. A few of my friends will be losing their jobs or businesses and will have to start over in a new and different place. In addition, this anxiety is also being reflected in the stock market while I'm writing this, as the Dow is down nearly 190 points as investors are fearing that the steps the new administration are

## President's Report

At NMAG we can hardly believe that it is already mid-February. In spite of the grave economic situation, we hope that you are enjoying a happy new year, full of hope for the future. Memberships are coming in well here. We are gratified that you value your professional association.

As you may have heard through the grapevine, I am resigning as President of NMAG at the end of May. I have been appointed the Chief Executive Officer of the Global Greengrants Fund, beginning at 20 percent time now and half-time in the Spring. By June 1, I will have moved to Boulder, Colorado full time.

In March, April and May, I will be in the office only two days a week. I still have several months at the helm of NMAG, so no goodbyes just yet. Although I'm excited about the new job, I will leave this post and New Mexico with considerable ambivalence and even sadness.

At their meeting on January 27, the Board decided that the Executive Committee will become a Search Committee under the leadership of our new Treasurer, Tripp Killin. Last week, the team (Gay Dillingham, Livingry Foundation, Elizabeth Crittenden Palacios, Taos Community Foundation, and Dolores Roybal, Con Alma Health Foundation) approved a job posting for a new part-time Executive Director. Please review it on our website - [www.nmag.org](http://www.nmag.org) - send it on to likely candidates, or consider applying yourself. Submission will only be accepted by email. The deadline is March 19. We are hoping I will have some overlap with my successor.

Susan Cantor has been promoted to Associate Director. Over the last few years she has been taking on increasing responsibilities in budgeting, membership and research. She also redesigned our wonderful website. Well deserved congratulations to Susan.

NMAG has a committed, strong Board, with whom it is a pleasure to work. Our continuing Chair, Gay, and Vice Chair, Elizabeth, are joined in their leadership by Tripp as Treasurer and Dolores as Secretary. We welcomed four new board members to the last meeting: Linda Anderson of the Domanica Foundation in Las Vegas; Rita McCusker of the Daniels Fund in Denver; Randy Royster of the Albuquerque Community Foundation; and Steve Simon of the Ronald M. Simon Family Foundation (who generously agreed to write the accompanying guest column). Continuing board members include Lynn Hathaway, City of Santa Fe Children & Youth Commission, Ben Maddox, J. F. Maddox Foundation, Diane Ogawa, PNM and PNM Resources Foundation, Lisa Oppenheimer, Oppenheimer Brothers Foundation, and Frank Sanchez, Needmor Fund. The entire Board, Susan Cantor and I ask for your ideas and input during this time of transition for the country, foundations and NMAG. Call or write us at any time.

### **Finances, Fundraising and Membership**

Considering the economic crisis, our financial situation was relatively good as we closed out 2008. We had over \$47,000 in our checking and money market accounts. We raised 113 percent of the 2008 budget, while spending 98 percent, leaving a net income of \$31,548. This is the first year in many that we have had a balanced budget. Our "reserves" are quite limited however. Our annual report will be on-line within a week or so. If you want printed copies, just ask us for them. We are saving on printing and postage this year.

The Board has approved two new member applications: one from Deborah Holloway of the Seabury Foundation in Chicago. Deborah and her daughter moved to Santa Fe recently and she is planning to do funding in New Mexico in 2009. Deborah has attended our last few programs. The other is from a new family foundation in Albuquerque, Wendy Wells and the Isora Foundation. Wendy had attended our Annual

taking will fail to curb the global economic downturn. What will be the outcome of all this is far from certain and we are being asked to dwell within the land of an ambiguity where there are more questions and fewer answers. For it is now becoming clear that we are now entering a new paradigm in which the old ways of doing things may no longer work.

Grantmakers are now facing the painful dilemma of having fewer funds available in times of greater need and will have to begin the process of rethinking their approaches to funding. In spite of the difficulties we may be facing, this can also prove to be a time of tremendous opportunity in which a process of deep reflection is undergone and the power of the human imagination is once again unleashed upon the world. Indeed the field of Philanthropy itself may be revisoned as it must take a leading role in these extraordinary times. Organizations such as NMAG are needed now more than ever to facilitate this process and to develop the community that is needed to carry us through this transition that may ultimately bring about a higher quality of life.

I'm looking forward to continuing to discuss and to learn from each of you on our differing approaches to these events and to continue in the development of a community that can have a meaningful impact upon our world.

#### **Briefing on the Economy and Charitable Giving The Center on Philanthropy at Indiana University November 2008 Summary**

Changes in giving are linked to changes in the overall economy. During good economic times, giving tends to grow robustly. However, when the economy grows at a moderate or slow rate, philanthropy continues, although at a slower rate of growth. In general, during economic downturns, giving tends to decline, after adjusting for inflation.

[Read more...](#)

**How CEOs and Trustees Navigate Change and Transform Foundations "Three Bites to the Apple"** publication is now available. How foundations navigate change is a topic of much study, inquiry, and debate. Council on Foundations Members may download the publication at

Conference in Albuquerque in 2007.

We actually have over \$79,000 in the bank as of this writing, which includes \$47,950 in memberships that have been received since January 1.

We realize that there will be fundraising challenges this year. Either I or a board member will be contacting many of you in the near future to urge you to make a grant to NMAG. We are most grateful to the Daniels Fund, which awarded \$25,000 in general support at the end of last year for use in 2009. Thank you also to David Douglas, the Killin Fund, as well as PNM and the PNM Resources Foundation for general operating grants. We also appreciate the New Mexico Community Foundation's grant to underwrite our recent program, "Women Building Community."

#### **Past Programs**

On November 19, NMAG held a successful annual member meeting luncheon, with 50 in attendance, featuring a dialogue on **The Financial Crisis: Implications for Grantmaking & Asset Management**. Gay Dillingham facilitated brief remarks by Linda Anderson, Blair Naylor, Dolores Roybal, Steve Rasmussen, and John Ulrich, which stimulated meaningful conversation among members, followed by our business meeting.

NMAG joined with the National Committee for Responsive Philanthropy in sponsoring a briefing and reception on December 4, unveiling a new research report on the positive impact of funding advocacy, organizing, and civic engagement in New Mexico through the **Grantmaking for Community Impact Project**. Lt. Governor Diane Denish made substantive opening and welcoming remarks. Five NMAG members (now all on the Board) participated on the host committee - Gay, Elizabeth, Dolores, Frank and Randy -- to ensure that funders recognized the importance of this work, as well as to serve as speakers and facilitators. More than 78 people attended and learned that for every dollar a foundation has invested in advocacy, organizing and civic engagement in New Mexico, over \$157 of public benefit is accrued. We are working with NCRP on follow-up efforts, which include the development of a power point presentation for use with Boards, especially those of community foundations.

A **Family Foundation Affinity Group** brownbag meeting was held on January 21, attended by ten. Thank you, Phil Howell at the Frost Foundation for hosting. The group would like to meet quarterly around focused themes affecting family foundations.

On January 28, the McCune and Turner Foundations, along with NMAG, offered a luncheon and **Funders Briefing on Water**, by Denise Fort, Professor of Law at the University of New Mexico. This session was a follow-up to our mini-conference on the theme last year. Denise presented her findings from a report commissioned by the Turner and McCune Foundations in which policies and legal strategies are explored in depth. Her [summary report](#) is posted on our website.

On February 5, at the request of the NM Community Foundation, which has generated the interest of several other funders in the state, NMAG offered a program on **Women Building Community**. With help from the national Tides Catalyst Fund, investment in New Mexico's women and girls through a match for Women of Color leadership and Reproductive Justice, NMCF is building a Collaborative that supports women-led organizations addressing core issues impacting women and girls and facilitates coordinated efforts in building a unified movement for services, leadership development and advocacy. Presenters included: Adriann Barboa, Young Women United; Vanessa Daniels, Tides Foundation; Andrea Plaza, Southwest Creations, and Kathy Sanchez, TEWA Women United. Kimi Green facilitated a panel format and dialogue on issues and strategies that support New Mexico's women and girls and engage local, national and public partnership.

#### **Public Policy**

Early this week, we will be distributing the NCRP report, *Strengthening Democracy, Increasing Opportunities: Impact of Advocacy, Organizing and Civic Engagement in New Mexico*, along with NMAGs *Philanthropy in New Mexico: 2008* to all our state legislators.

Late last year we re-convened the NMAG Public Policy Committee in preparation for this legislative session. Committee members are Billie

no charge. The nonmember price is \$10. The publication can be found at [www.cof.org/education](http://www.cof.org/education). Once you are on the main page, please go to the Resources Section to download the publication.

### **Working Across Generations: Defining the Future of Nonprofit Leadership**

Written by Building Movement Project Director and Team members Frances Kunreuther, Helen Kim and Robby Rodriguez, this book offers a comprehensive look at the leadership and generational shifts in the nonprofit sector.

For more information, including excerpts from the book, visit [www.workingacrossgenerations.org](http://www.workingacrossgenerations.org)

## **Philanthropy Provisions Unlikely in Final Stimulus Package**

Though foundation leaders pushed for measures aimed at improving the state of philanthropy in the midst of the recession, it is unlikely that the 2009 American Recovery and Reinvestment Act will include the suggested provisions.

An amendment filed by Senator Charles Schumer (D-NY) proposed a flat excise tax rate of 1.33 percent on private foundations, but it was not included in the final stimulus bill, which is expected to be signed by President Obama today. [Read the full article.](#)

*The following publication is now available in the NMAG library:*

### **The Social and Economic Value of Private and Community Foundations**

by Robert J. Shapiro, Ph.D. and Aparna Mather, Ph.D., December 2008, The Philanthropic Collaborative

We count on you to keep us informed of any news regarding your organization.

Letters to the Editor are welcome and encouraged.  
Send to [todendahl@nmag.org](mailto:todendahl@nmag.org)

**The NMAG Journal, Spring,**

Blair, Santa Fe Community Foundation; Gay Dillingham, Livingry Foundation; Katherine Freeman, United Way of Santa Fe County; Dolores Roybal, Con Alma Health Foundation; Carol Tucker Trelease of the Nirvana Manana Institute, and Kim Zamarin, New Mexico Community Foundation. We have a meeting scheduled tomorrow to discuss NMAG's stance on various ethics bills which are directed at nonprofits or include provisions affecting nonprofits.

Representative Lucky Varela has introduced a bill NMAG endorses: HB 454, which will enable foundations to give beyond historic dollar value.

Finally, I have learned that foundations in other states, especially community foundations, have been quite involved in planning for possible uses of any Federal Stimulus Package funds that will be distributed. NMAG has just begun to explore potential roles for the association and our members.

### **Future Plans**

Susan Cantor is staffing a Conference Committee which will convene in early March, to begin planning our 2009 Members Conference which will take place in November. Please save the dates **November 4-6**. So far, we have recruited six people to serve: board members Linda Anderson, Rita McCusker and Steve Simon, as well as Sarah Armstrong of the Armstrong-Clark Foundation in Roswell, Christa Coggins of the Santa Fe Community Foundation and Lisa O'Brien of the Taos Community Foundation. We're in conversation with others and welcome you, should you wish to join. The Committee will select the theme, tracts and speakers.

We are excited about our March 4 program **2010 Census: Getting an Accurate Count**, and urge you to attend. It is co-sponsored by the Population Resource Center in Washington, D.C., and the Center for Nonprofit Excellence in Albuquerque. Future funding for public programs in different communities through-out the state depends largely on knowing the community make up. This program will feature representatives from the Census Bureau, New Mexico State Government, a nonprofit organization and a funder each engaged in census work, and a Native American representative.

For details on future events see our website calendar at [www.nmag.org](http://www.nmag.org). As always, we encourage your comments, questions and views.

Respectfully submitted,

Terry Odendahl, President  
February 17, 2009

## **NMAG Member Programs**

- **MARCH 4 - 2010 Census: Getting an Accurate Count** Why is an accurate census so important? The 2010 Census will directly impact funding for your organization and those you serve. *Co-sponsored by Population Resource Center and the Center for Nonprofit Excellence. 9 - 11 a.m., Hotel Santa Fe, Hacienda Room*
- **MARCH 5** - Join other non-profit agency leaders in a facilitated round table discussion on weathering challenging economic times. Presented by: Social Enterprise Ventures RSVP to [adam@socialenterprise.net](mailto:adam@socialenterprise.net) or call 505-920-4400. *Co-sponsored by the Santa Fe Complex and Santa Fe Community Foundation. 8:45 - 10:30 am, Santa Fe Complex, 624 Agua Fria St*
- **APRIL 6 - Native Americans in Philanthropy** New Mexico Association of Grantmakers is pleased to join with Native Americans in Philanthropy to sponsor a special learning opportunity about investing in Native communities. **Hyatt Regency Tamaya Resort**
- **APRIL 23 - Essentials Skills for Grantmakers. Maximizing Grant Impact: A Working Session for Grantmakers** Presenter: Jeff W. Pryor, Ed.D., Executive Director, Anshutz Family Foundation  
The focus of this working session will be to explore key strategies on impact and will include an overview of strategies, followed by discussions on different approaches. *Co-sponsored*

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*by the Conference of Southwest Foundations. 1 - 4 p.m., Inn at  
Loretto*

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The Council on Foundations, in partnership with the Association on Small Foundations is pleased to announce a **Multi-generational Family Retreat**

**Lakeville, Connecticut  
Interlaken Inn  
July 31-August 2, 2009**

Whether your foundation has been around for 50 years, your family is new to philanthropy, or you find yourself somewhere in between, the Multi-generational Family Retreat will advance your giving to the next step. The retreat includes engaging sessions for children and adults, and unstructured time to relax with your family. For more information and to register, please visit: <http://www.smallfoundations.org/site/pp.asp?c=fvKRI7MPJqF&b=4874335>

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