



NEW MEXICO
ASSOCIATION OF
GRANTMAKERS

The NMAG Quarterly, March 2007, Volume V, Number 1

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

President's Column

I have enjoyed my first few months on the job, and am learning about the membership and your needs. The Board and I want to hear more from you, our members, about how NMAG might add value to your philanthropic work. Please take the time to answer this important on-line survey by clicking

<http://www.surveymonkey.com/s.asp?u=44853560026>.

On February 28, I represented NMAG in Washington, D.C. at "Foundations on the Hill" along with Sarah Losinger, Board Chair of the McCune Charitable Foundation, and her son John, who is also a Trustee at McCune. For 10 years, foundation representatives have gathered annually to meet with members of congress. Over 380 funders attended this year's event, co-sponsored by the Council on Foundations and the Forum of Regional Associations of Grantmakers, of which NMAG is a member. Foundation trustees, executives and staff, working with their regional association, schedule meetings on Capitol Hill to personally discuss their work with members of Congress. Please let me know if you have any interest in participating next year.

The New Mexico contingent was small, so Linda Evans, CEO of the Meadows Foundation in Dallas, Texas, joined us for an unusual two and a half hour meeting with three different staffers in Senator Jeff Bingaman's office. Sarah, John and I had the anticipated twenty minutes, with photo opportunities, at Congressman Tom Udall's. The other US representatives did not respond to my request for appointments.

The purpose of “Foundations on the Hill” is to educate and inform Congress about philanthropy; create visibility for foundations and philanthropy on Capitol Hill; advocate on issues affecting foundations; and encourage Congress to view foundations as resources on key public policy issues. In addition to describing the role of foundations in New Mexico, explaining about donor advised funds at community foundations, and discussing simplifying the private foundation excise tax, we used the opportunity to brief the Congressional staffers on the work of the New Mexico Climate Change Funders group and thanked Senator Bingaman and Congressman Udall for their leadership on reducing global warming emissions.

While we made some progress in building relationships with the staffers, we were uniformly shocked at how little they knew about foundations, much less donor advised funds, or philanthropy in the state of New Mexico. Since Senator Bingaman sits on the Senate Finance Committee, which has passed recent regulation affecting donor advised funds, and has a new staff member focused on tax policy, that meeting was particularly important.

I’m keeping my column short. Look to the upcoming and recent programs section below to see what I’ve been up to. Once again, in addition to completing the online survey, please call or email me or Susan Cantor at any time with comments, concerns, ideas, new grants, and staff appointments. We will share the news with members: (505) 995-0933 todendahl@nmag.org – Susan –scantor@nmag.org I work Tuesdays, Wednesdays and Thursdays on a regular basis. Susan is in the office Monday through Friday. I will be on holiday the first week in April.

Respectfully Submitted,
March 21, 2007

Guest Column

Elizabeth Crittenden-Palacios, Executive Director, Taos Community Foundation

Musing on Taos Community Foundation and our work.

I said I was jumping the fence when I came to work for Taos Community Foundation (TCF) five years ago. While the view is different I do not feel the work is.

I came to the Foundation from the Institute for Intercultural Leadership at Santa Fe Community College. While there I studied, adapted and applied leadership models and theory to our work in community; creating change, building collaborations and making impact. During my tenure I lead the organization in a wide range of programmatic initiatives supporting leadership, diversity, equity, cross-cultural understanding, community Development and social change including the ENLACE Project, Youth Leadership Academy and Connecting to Courage which ~ received 2003 SAMHSA Award for effective programming.

I believe the well-being of each citizen is connected to that of every other and that the vitality of community is determined by the quality of those connections. I apply this to the work of Taos Community Foundation, whether the connection is working with a donor or non profit.

The Foundation works in three areas of community:

- We provide an easy and effective vehicle for people to achieve their charitable goals, whatever they may be.
- We support non-profits and charitable organizations in a variety of ways through grant making and by providing education and technical assistance. Working to empower and strengthen the philanthropy within the community.
- We work with community to identify needs, issues, opportunities, and resources. This gives us in-depth understanding of the community's challenges and the non-profit groups and agencies addressing them.

We keep our eye on the future and how TCF will be able to serve our community far past my tenure. We know the community issues today will focus the needs of tomorrow. We are constantly in a balance between building endowment for tomorrow and taking care today. We have had success in our growth and our ability to give. We have grown to 63 funds with \$4.3 million in assets, and we award more than \$500k per year in grants. We have launched a new campaign to build our endowments to 10 million by 2010 and double that by 2015.

The Independent Sector in our community is quite large. We calculate around 180 operational NPs currently in business and estimate the size of the sector to be more than 38 million dollars. Many people ask why are there so many non-profits in Taos? No one asks why there are so many businesses. Nonprofits are businesses with a slightly different IRS recognition and a deeper commitment to the social well being of our community.

Because of the largeness of the sector and smallness of our ability to give, we know we can't fund all the applications we receive. In our last competitive cycle we had \$150,000 to award and \$2 million in applications.

We are working to bring our grant making into alignment with our community work. In the last few years we have fostered many collaborations which have resulted in a viable youth providers network, an early childhood initiative, coordinated healthcare services, healthcare voucher programs, violence prevention programs in the schools and philanthropic partnerships. We are toiling with the Town of Taos to develop a Community Development Steering Committee in an attempt to better align the Town's communication between sectors and contract funds that address the needs of community. This entails the development of clearer priorities and benchmarks so the non-profits replying to RFPs can deliver effectively and the town council can measure their impact. I sometimes refer to myself as Pollyanna and while I don't want to say it applies in this circumstance I also know the whims of small town politics. But we keep trying.

We fund with an eye toward system change and organizational capacity. While we still give many technical grants, we are implementing a model of adaptive leadership with our grantees. We want to be in partnership with them working toward a solution, lending our expertise and influence, and building partnerships toward a common end. We look at the work being done by larger foundations and ask ourselves how can a smaller foundation making smaller grants have influence and create lasting community change. We have found that well placed smaller grants often leverage the greatest change.

We build on these small grants. For example, we have one granting initiative that assists residents in purchasing medications when they have no way to self-pay. Through this initiative we built a healthcare safety net to insure that all residents have access to medications. We then created a community-wide system of prescription assistance and pharmaceutical care that is now operated by Collaborative for Taos County Health (CATCH), an organization that crosses the cultural divide between medical and social programs. CATCH is networked into 8 organizations serving 4000 residents through vouchers and access to long-term prescription assistance.

With each success, we evaluate what works and apply it in another context to build a stronger network for a healthy community. We listen, connect, and apply lessons to shift thinking to a broader community-base, and leverage resources toward our mission.

Because this collaborative model was successful, we implemented it to assist with pediatric care along with patient advocacy fostering a new pediatric healthcare non-profit (ECHO). ECHO proved a perfect fit to partner with the prescription assistance program and CATCH. When LANL's First Born program was started in Taos we looked at the similarities between the other three programs and encouraged their partnership.

Taos now has a center for patient management. There is a single point of entry for disease control, patient advocacy, prescriptions assistance, and parent support. This collaboration is supported by five funding sources and fostered by small grants from Taos Community Foundation. We are now looking at how elder services might fit.....

We have faced the challenge of being a small foundation that was met with suspicion by non-profits and community. In a recent article in the Taos News about the Public Education fund at TCF the reporter said "...the fund is linked with the well established Taos Community Foundation....."

New Mexico Community Foundations

- Albuquerque Community Foundation
Randy Royster, Executive Director
- Carlsbad Foundation *
Jim Harrison, Executive Director
- Community Foundation of Chaves County
Susie Russell, Executive Director
- Lea County Charitable Foundation

- McKinley County Community Development Foundation
- New Mexico Community Foundation *
Bob Stark, Executive Director
- Santa Fe Community Foundation *
Billie Blair, Executive Director
- Community Foundation of Southern New Mexico
Stephanie Johnson-Burick, Executive Director
- Taos Community Foundation *
Elizabeth Crittenden-Palacios, Executive Director

* NMAG Member

New Members

NMAG is pleased to welcome two new member grantmaking organizations:

Abelard Foundation, Daniel Schreck, President

The Abelard Foundation is a private family grantmaker, incorporated in NY and operating out of Oakland, CA. The Foundation President lives in Chimayo, New Mexico. The Abelard Foundation grants in New Mexico to community and economic development, the environment, and social justice nonprofits.

Don Chalmers Ford, Pamela Chavez, Director of Community Relations

Don Chalmers believes that his companies should support the communities that they serve. One of the core values of the dealership is "Serve The Community" through funding and volunteerism. The four areas in which this corporate funder focuses support are: Education, Healthcare, Economic Development, and Community Service. Don Chalmers Ford gives grants to nonprofit groups in the New Mexico communities where they have dealerships.

Welcome to New Staff

Lisa O'Brien is the new Grants and Program Officer at the Taos Community Foundation (TCF). Lisa comes to the Community Foundation with 16 years experience in the field of social work. A skilled counselor and administrator, Lisa is applying her expertise to TCF's grantmaking, NP education, donor opportunity, and community collaborations. She will foster TCF's growth by supporting donors and non profits and by measurement of our impact through the incorporation of system change theory.

Dolores E. Roybal is the newly appointed Executive Director of Con Alma Health Foundation, a private foundation with assets of nearly \$29 million. Dolores most recently served as the Program Director of Con Alma Health Foundation. Prior experience included positions as Program Director, Santa Fe Community Foundation; founding Executive Director of NGO New Mexico, the New Mexico Nonprofit

Association; Director of Graduate and External Programs and Assistant Dean at the College of Santa Fe.

Renee Paisano Trujillo is the new Director of the NM Integrated Services in Schools Initiative (NMISSI) at the New Mexico Community Foundation. She has over 25 years experience with nonprofit advocacy and community development organizations. Renee has designed and delivered training and technical assistance to reservation and rural communities in New Mexico, Arizona, Nevada, North Dakota, and Arizona, primarily focused on positive youth development strategies. She is currently serving on an advisory committee for Supporting Student Success.

Grants Awarded to NMAG

On behalf of the Board, Membership and Staff, thanks to the following funders for general operating support to NMAG:

Cudd Foundation

Daniels Fund

Frost Foundation

Killin Endowment Fund

Livingry Foundation

McCune Charitable Foundation

Messengers of the Healing Winds

Santa Fe Community Foundation

Upcoming NMAG Programs

Save the Dates:

April 12 – NGO-NM conference and Grantmaker/seeker Dialogue, ABQ

April 17 – Environmental Affinity Group Brownbag, NMAG Office

April 26 – Public Education in New Mexico, ABQ

May 8 – Health and Human Services Affinity Group –Con Alma

May 15 – Children & Youth Affinity Group, TBA

May 21 – Pablo Eisenberg and Bill Schambra Debate, TBA

May 31 – Jarratt Appelwhite, New Mexico Community Capital, McCune Foundation

Thursday, April 12, 1:00 – 4:00, NGO-NM with NMAG “Grantmaker-Grantseeker Forum”

NGO-NM will present its annual conference at the offices of the Center for Nonprofit Excellence, United Way of Central New Mexico, 2340 Alamo Avenue SE 2nd Floor, Albuquerque. As part of this conference NMAG will co-sponsor an afternoon funder/grantseeker dialogue from 1:45 – 3:00 pm, facilitated by Yolanda Archuletta, Executive Director of the New Mexico Women’s Foundation, followed by break-out sessions from 3:15 – 4:00 pm on “Corporate Funding,” “Community and Private Foundation Funding,” and “Government Funding.” This is an opportunity for grantmakers and nonprofits to candidly discuss issues of importance to both. NMAG is

recruiting 20 funders to meet with the representatives of the nonprofits. Funders are asked to arrive no later than 1:00 for briefing with Yolanda and Terry Odendahl. Please RSVP to scantor@nmag.org or by phone at 505-995-0933 to sign up for this valuable session.

On April 26 NMAG will present a panel discussion on Public Education in New Mexico. This program is being presented as part of the 9th Annual Governor's Spotlight on Volunteers Conference and co-sponsored by The New Mexico Commission for Community Volunteerism. Luncheon and panel discussion from 11:45 – 2:00 pm in Albuquerque.

A report published earlier this year by *Education Week* places New Mexico last in the country in their "Chance for Success Index." What are the factors included in that rating and how did we come to be rated last in the United States? What does this mean for New Mexico's children as they make their way in the world? And what is being done or can be done by both public and private funders to strengthen and improve the education system currently in place? Speakers include:

Chris Swanson, Director of Research, *Education Week*

Dr. Veronica Garcia, NM Secretary of Education

Jason Gaulden, Program Officer for Education, Daniels Fund

Diane Ogawa, Executive Director, PNM and PNM Resources Foundation

Ben Maddox, Trustee, J. F Maddox Foundation and Board Chair, NMAG, moderator

This program will be held at the Sandia Pueblo Resort, off I-25 just north of Albuquerque. The Conference starts at 8:00 a.m. The cost for the program is \$15.00 which includes entry to the all-day conference and the luncheon. **Registration deadline is April 10, 2007.** Please RSVP to scantor@nmag.org or 505-995-0933 and mail check to: New Mexico Association of Grantmakers, PO Box 9280, Santa Fe, NM 87504.

Selected Recent NMAG Programs

Many thanks to all the excellent presenters in February and March.

On February 7, NMAG and the McCune Charitable Foundation hosted the **Christensen Fund staff**, Dr. Ken Wilson, Executive Director; Dr. Laura Monti, Program Officer for the Greater Southwest; and Dr. Enrique Salmón, Outgoing PO; to learn more about their global and local efforts "backing the stewards of cultural and biological diversity" and for them to hear about our work in New Mexico.

On February 20, Bob Reid, Executive Director of the J.F Maddox Foundation, and Mike Loftin, Executive Director of Homewise, presented a workshop entitled "**Performance Measurement: A Strategy to Increase Impact & Advance Learning.**"

On March 15, a program on “**Matching Foundation Investments with Mission**”
Featured: Cliff Feigenbaum, Founder, GreenMoney Journal
Trevor Loy, Managing Partner, Flywheel Ventures and Co-Founder, Social Venture
Partners New Mexico
Owen Lopez, Executive Director, McCune Charitable Foundation
Blair Naylor, Principal, Palace Capital and Trustee, Cudd Foundation, Moderator.

Recent news stories on the Gates Foundation highlight how the investment portfolio of the world’s largest private funder may be discordant with its grantmaking mission. The Gates Foundation, however, is not that unusual in its approach to investing. Should a foundation’s financial policies match its mission? What is socially responsible investing and how would a foundation change investment policies to reflect grantmaking values? What are program related investments? What other approaches such as exercising shareholder proxies might foundations utilize? A lively discussion of these issues and other related topics ensued. **CDs are available at no charge. Please contact Susan at scantor@nmag.org or 995-0933 to request your copy. Cliff Feigenbaum, publisher of Greenmoney Journal, who appeared on the panel, is offering the membership a year-long subscription to the journal for \$15. Please go to www.greenmoney.com or call 800-849-8751 to subscribe.**

New Grants Announced

On March 2, 2007, the **Daniels Fund** Awarded \$710,500 in Grants to New Mexico Nonprofits: Programs serving the homeless, the aging, educational initiatives, and the disabled were among the major grant recipients as the Daniels Fund board approved \$710,500 in funding to nonprofit organizations in New Mexico during their first quarter meeting on Feb. 27 in Denver.

Grant recipients include: Albuquerque Public Schools Foundation; ARCA – Supported Living Program; Catholic Charities of Gallup, Inc.; Daybreak Center - Sarah's House Transitional Housing Program; Embudo Valley Library and Community Center; Explora Science Center and Children's Museum of Albuquerque; Food For Santa Fe, Inc.; La Casa Incorporated; Las Cumbres Community Services, Inc.; New Mexico Association of Food Banks; Presbyterian Medical Services; Taos Youth Soccer League, Inc.; and others.

The Daniels Fund will award a projected \$3.8 million in grants in New Mexico in 2007. The program areas eligible for grants through the Daniels Fund fall under the categories of: Aging, Alcoholism & Substance Abuse, Amateur Sports, Disabilities, Education, Homeless & Disadvantaged and Youth Development.

Recent News and Research Reports on Philanthropy

Foundations Need to Be More Accountable

“Building Solid Foundations: New Approaches to Substantive Philanthropic

Accountability,” by Rick Cohen, asks, "What kind of difference should foundations make in our society?" The author examines what foundations do to deserve tax-exempt status, and to whom they should hold themselves accountable. Cohen presents three arguments against and in favor of an increase in the federal requirement that foundations pay out at least 5 percent of their assets. He describes how nonprofit groups, foundations, and activists might organize a campaign to "push the philanthropic sector toward a role in promoting democracy"; and explores other issues relevant to foundation accountability. <http://www.ncrp.org>

Foundations Today Series from the Foundation Center Foundation Giving Trends, 2007 Edition, February 2007

Foundation giving for most program areas grew in 2005, and funders increased the number of exceptionally large grants they awarded, according to *Foundation Giving Trends: Update on Funding Priorities* (2007 Edition). Among major subject areas, international affairs and the environment experienced the fastest growth in funding. The share of grant dollars allocated to capital projects rose, following five consecutive years of decline. Key findings in the report include:

- Foundations awarded a record 308 grants of \$5 million or more in 2005.
- Grant dollars awarded by sampled foundations rose 6.1% in 2005, following an 8.1% gain in the prior year.
- Grant dollars for international affairs, development, and peace jumped nearly 41% to a record \$591.2 million in the latest year, boosted by tsunami-related giving and increased funding by the Bill & Melinda Gates Foundation.
- For the first time, corporate foundations gave a larger share of their grant dollars than other types of grantmakers for international affairs, reflecting support provided in response to the Indian Ocean tsunami disaster.
- The share of grant dollars to fund building construction, endowments, and other capital projects climbed to 18.5%, up from a record low of 16.8% in 2004.

and

Key Facts on Family Foundations, January 2007

Family foundations represented more than half of all independent foundations in 2005, and larger family foundations provided similar shares of funding for similar types of support compared to independent foundations overall. Common areas of funding included education, health, and religion. Areas less likely to receive funding included human services and arts and culture.

<http://foundationcenter.org/gainknowledge/research/nationaltrends>

General Operating Grants are Most Effective

A new report, "In Search of Impact," on a three-year national study by the Center for Effective Philanthropy finds that foundations should provide nonprofits larger operating grants for a longer duration to maximize innovative and successful programs.

http://www.effectivephilanthropy.org/publications/publications_downloadorder.asp

New Philanthropy Blog

Philanthropy Journal has a new blog that is updated daily with entries from its editor and publisher, Todd Cohen. <http://philanthropyjournal.blogspot.com/>

National Conferences Coming to New Mexico (open to NMAG members at their member rates)

Environmental Grantmakers Association, 2007 Fall Retreat
September 23-26, 1007, Tamaya, Santa Ana Pueblo
“Celebrating 25 Years”

Grantmakers for Education, 11th Annual Conference
October 17-19, 2007; Tamaya, Santa Ana Pueblo
“Crossing Borders and Boundaries: Reinventing our practice to meet the future challenge
-OR- What are the imperative changes in education and philanthropy?”

Grantmakers in the Arts, 2007 Conference: Taos Journey
October 21-24, 2007, Taos, New Mexico

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Editor and Writer: Teresa Odendahl, Ph.D., President, NMAG

Contributors: Susan Cantor, Assistant Director, NMAG

Elizabeth Crittenden-Palacios, Taos Community Foundation

Letters to the Editor are welcome and encouraged. Send to todendahl@nmag.org

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NEW MEXICO ASSOCIATION OF GRANTMAKERS

2007 Member Survey

1. Mission/Vision

New Mexico Association of Grantmakers (NMAG) is preparing for a strategic planning session to discuss the future of NMAG. The Board will be meeting in June to work on a number of issues. In preparation for that meeting we would like to have your input on a variety of questions.

Currently, NMAG is dedicated to increasing the effectiveness and impact of organized philanthropy throughout our region. NMAG seeks to encourage and strengthen philanthropy by:

- * facilitating and increasing communication and information sharing among members
- * alerting members to community needs and emerging issues in philanthropy
- * enhancing the effectiveness of members' decision-making and their use of philanthropic resources
- * encouraging the development of new philanthropy

- * promoting sound public policy on issues affecting philanthropy and the public sector
- * improving grantmaker-grantseeker cooperation and communication
- * initiating, leading and facilitating collaborations and new approaches to solving community problems

1. Do you support the purpose of NMAG as stated above?

Yes

No

Please comment:

[Next >>](#)