

Philanthropy in New Mexico

2018 Edition



The School of the Aspen Santa Fe Ballet
Rosalie O'Connor, New Mexico Arts



New Mexico
Association of
Grantmakers

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About New Mexico Association of Grantmakers

The New Mexico Association of Grantmakers (NMAG) is a membership network composed of philanthropic organizations and individuals with giving programs in New Mexico. Established in 1991, NMAG's mission is to increase the effectiveness and impact of organized philanthropy in New Mexico. The organization supports and strengthens effective philanthropy, working to improve the lives of people and their communities across New Mexico.

The New Mexico Association of Grantmakers is the largest network of funders in the state, with over \$50 million in annual giving and collective expertise on community needs in New Mexico. Our members include family, community and independent foundations, public charities, corporations, and other types of funders (donor-advised funds, charitable trusts, and individual philanthropists). Visit nmag.org

About Con Alma Health Foundation

This giving study was made possible with the generous support from Con Alma Health Foundation. We thank Dolores E. Roybal, Executive Director and Con Alma Health Foundation team for their invaluable financial support and guidance in developing this report. Con Alma Health Foundation is organized to be aware of and respond to the health rights and needs of culturally and demographically diverse peoples and communities of New Mexico. Visit conalma.org

About Foundation Center

The New Mexico Association of Grantmakers has partnered with Foundation Center to produce this report. We are grateful to Foundation Center staff and leadership for providing the data and design expertise for this edition of the Philanthropy in New Mexico giving study.

Foundation Center also hosts the New Mexico Foundation Dashboard at newmexico.foundationcenter.org. The Dashboard provides an at-a-glance overview of institutional philanthropy for the State of New Mexico. This effort is part of the campaign to "Get on the Map," which is a national partnership between Foundation Center, United Philanthropy Forum, and New Mexico Association of Grantmakers to improve the quality and availability of public data about New Mexico philanthropy.

Established in 1956, Foundation Center is the leading source of information about philanthropy worldwide.

Other Contributors

We also thank the W.K. Kellogg Foundation for their financial support to NMAG that allows this report to be published.

We are also grateful to the Philanthropy in New Mexico Advisory Committee members for their thoughtful guidance in developing the framework for this report and the Outlook for Foundation Giving companion report.

Introduction

The New Mexico Association of Grantmakers (NMAG) is pleased to share this fourth report in a series published on the state of *Philanthropy in New Mexico 2018*. This report takes a closer look at the scope of New Mexico's grantmaking foundations, their giving practices and priorities. This report also provides a comparison with the last giving report published by NMAG, *Philanthropy in New Mexico 2012*. These periodic reports help with our understanding of the role of philanthropy and the nonprofit sector in our society in addressing the needs of New Mexico communities.

The analysis for this report includes assets and giving made by private, corporate, community, and operating foundations and public charities in 2015. The analysis does not include government funding sources or individual charitable contributions, where the vast majority of giving is made each year. Compared to government expenditures and private giving, foundation giving represents only a small fraction of the total.

A companion analysis and report *Outlook for Foundation Giving* by New Mexico foundations will augment the findings highlighted in this report. Through a survey of New Mexico Foundations, the Outlook for Foundation Giving report describes how funders are working to strengthen the region's nonprofit sector and provide insight into potential changes in local grantmaking strategies.

Highlights on what has changed since the last *Philanthropy in New Mexico* report

Demographic Shifts - The U.S. Census Bureau reports that since 2010, New Mexico has observed an outmigration of young adults, resulting in a population that is aging faster, more Hispanic, and more sparsely populated in rural areas of the state.

Foundation Giving Increases - New Mexico philanthropy assets and giving grew gradually, but significantly since 2010, as it largely recovered from the 2008–2009 economic recession. This demonstrates a resiliency and commitment from New Mexico's philanthropic communities to address the state's challenges and opportunities.

Individual Giving Decreases - The National Center for Charitable Statistics (NCCS 2015) reports that since 2009, individual charitable giving has decreased by 10 percent as reported by individuals itemizing their deductions. (33 percent in 2009 to 23 percent in 2015)

Philanthropic Divide Designation Continues - New Mexico has continued to rank among the bottom 10 states in assets and giving levels since 2005. There were almost no measurable changes in the state's ranking for total giving and assets since the 2012 report. (In 2014, New Mexico ranked 43th in giving and 44th in assets).

Rural Philanthropy Still Lags Behind - The number and percent of mostly rural New Mexico counties receiving no foundation grants increased since the 2012 report. (12 percent in 2009 to 27 percent in 2015).

NMAG's New Online Foundation Dashboard - This report coincides with the launch of the new online New Mexico Foundation Stat Dashboard. Groups and individuals now have the most current and up-to-date information on foundations and their giving programs in New Mexico in real time without having to wait for written reports.

Snapshot Findings for 2015

Total number of NEW MEXICO foundations

277

Total assets of NEW MEXICO foundations

\$1.7 Billion

Total giving by
NEW MEXICO foundations

\$82.5 Million

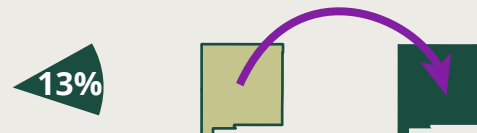
Total giving by NON-NEW MEXICO foundations to NEW MEXICO recipient organizations

\$153.4 Million

Share of giving by NON-NEW MEXICO foundations to NEW MEXICO recipients



Share of giving provided by
NEW MEXICO-BASED foundations to NEW MEXICO recipients



Top funding areas of NEW MEXICO foundations



Education



Arts and Culture



Science and Engineering

Top population groups benefiting from NEW MEXICO foundation giving



Children and Youth



Economically Disadvantaged

The New Mexico Foundation Community

New Mexico is home to a growing number of grantmaking foundations. The grantmaking community includes independent/family, community, corporate, health legacy, and operating foundations of all sizes, funding in a range of issue areas, populations and support strategies. These foundations give locally or within the state, but also fund national and international programs. The following figures provide an overview of the scale and composition of the New Mexico foundation community, and compares how New Mexico foundations have fared relative to U.S. foundations in general over the past decade.

Family and Independent Foundations Account for the Majority of New Mexico Foundations

Family and independent foundations account for 82 percent, or eight out of 10 foundations based in New Mexico. They are also responsible for the majority of foundation assets and giving, accounting for 80 percent of total assets and over three-quarters of total giving. This compares with national foundation data where independent and family foundations account for 82 percent of total assets and 69 percent of all giving. Seventeen of the top 25 New Mexico-based foundations were family or independent foundations. (For a list of the top New Mexico-based funders see newmexico.foundationcenter.org.)

Top 10 New Mexico-Based Funders Accounted for Over Half of Giving and Assets

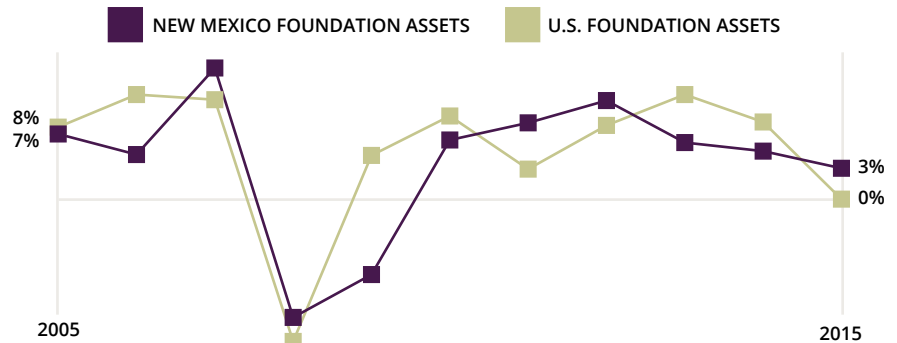
Consistent with patterns across the country, the top 10 New Mexico based foundations by giving accounted for over 58 percent of 2015 grant dollars awarded by funders in the state. The top 10 foundations by assets held 62 percent of total assets by New Mexico based foundations. Five of the top 10 New Mexico-based foundations have defined a statewide or local geographic focus area within the state. (For a list of top New Mexico-based funders see newmexico.foundationcenter.org.)

Summary Statistics for New Mexico Grantmaking Foundations by Type, 2015

TYPE	NO. FDNS	%	ASSETS	%	TOTAL GIVING	%
FAMILY	132	47.7	\$1,133,391,657	67.6	\$51,673,693	62.6
INDEPENDENT	95	34.3	214,101,266	12.8	12,052,020	14.6
OPERATING	22	7.9	36,570,165	2.2	1,971,742	2.4
CORPORATE	20	7.2	76,679,211	4.6	3,836,798	4.6
COMMUNITY	7	2.5	188,291,864	11.2	12,629,143	15.3
HEALTH LEGACY	1	0.4	26,999,029	1.6	366,600	0.4
TOTAL	277	100.0	\$1,676,033,192	100.0	\$82,529,996	100.0

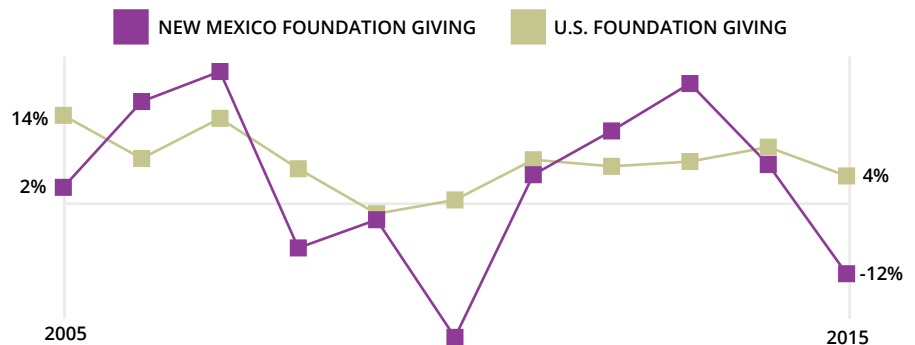
Source: Foundation Center, 2018.

Percent Change in Assets of New Mexico vs. All U.S. Foundations, 2005 to 2015



Source: Foundation Center, 2018. Change in total giving are not based on inflation-adjusted figures.

Percent Change in Total Giving of New Mexico vs. All U.S. Foundations, 2005 to 2015



Source: Foundation Center, 2018. Change in total giving are not based on inflation-adjusted figures.

New Mexico Community Foundations Play a Central Role in Grantmaking

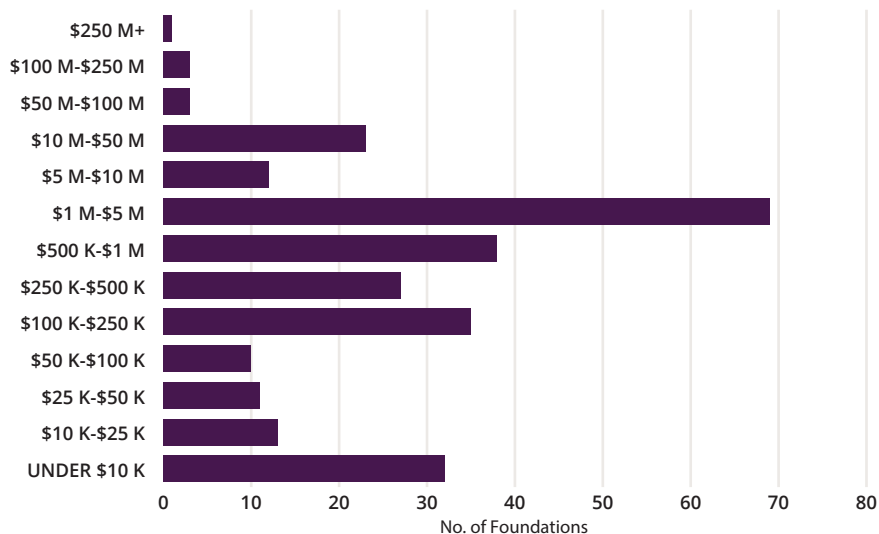
In 2015, giving by the seven active New Mexico community foundations accounted for close to \$13 million or 15 percent of total giving and over \$188 million or 11 percent of the total assets. This is a substantial amount since community foundations account for less than 3 percent of the 277 New Mexico-based foundations. Three community foundations, Albuquerque, New Mexico and Santa Fe, are among the top 10 New Mexico-based foundations by giving.

Note: These figures exclude 10 additional New Mexico-based community foundations reporting limited giving or separately named “community foundations” that are legally part of other community foundations.

New Mexico Corporate Foundations as Significant Contributors

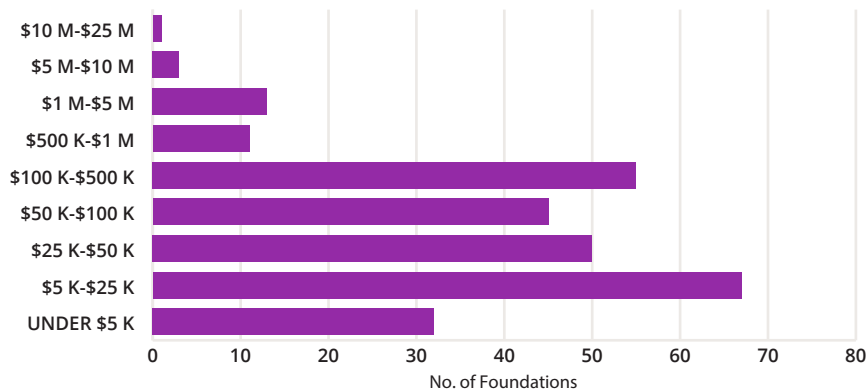
New Mexico corporate foundations account for 5 percent of grant dollars reported with total giving of \$3.8 million in 2015. Corporate foundations’ 5 percent share of overall New Mexico foundation giving was less than the 10 percent share recorded nationally. While a total of 20 New Mexico corporate foundations made grants in 2015, giving was extremely concentrated among the largest funders. The Chase Foundation in Artesia is at the top of the list, whose primary focus is Southeastern New Mexico and West Texas.

Asset Range of New Mexico Foundations, 2015



Source: Foundation Center, 2018.

Total Giving Range of New Mexico Foundations, 2015



Source: Foundation Center, 2018.

New Mexico Foundation Assets have Grown Slower than U.S. Foundations

In 2015, New Mexico foundations assets reached peak levels of just under \$1.7 billion in assets, up 27 percent since 2005. By comparison, assets for U.S. foundations nationally rose nearly 40 percent during this period. Similar to national trends, New Mexico foundation assets were significantly affected by the 2008 economic recession, dropping by almost 20 percent in 2008 but surpassed the pre-recession peak by 2013.

New Mexico Foundation Giving has Grown Slower than U.S. Foundations

In 2015, New Mexico based foundations reported \$82.9 million in total giving, a 12 percent decrease from the highest giving year (2014) over the past decade. Overall giving was up by 21.5 percent since 2005. By comparison, giving by U.S. foundations nationally rose 42 percent during this same period. The New Mexico foundation community showed a steep decrease in giving in 2010 that resulted from the 2008 economic recession, but has since largely recovered following a similar pattern for U.S. Foundations.

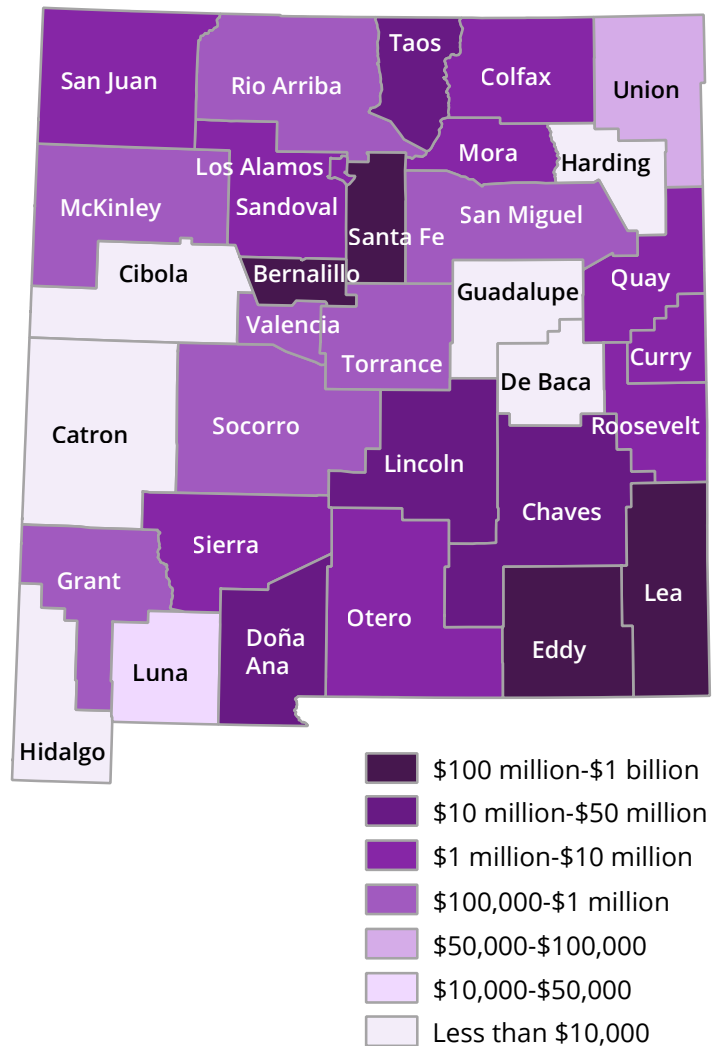
Small Foundations Provide Critical Support in New Mexico

In 2015, nearly 90 percent (249) of New Mexico-based foundations had annual grantmaking contributions of less than \$500,000. Over half of those groups gave less than \$50,000 annually. The majority of foundations (61 percent) had asset ranges between \$100,000 and \$5 million.

Foundations in Four Counties Accounted for the Majority of Giving by New Mexico Grantmakers

Grantmaking foundations were located in the majority of New Mexico counties (27 out of 33) in 2015. However, nearly 60 percent, or 163 out of 277 foundations were based in Bernalillo and Santa Fe counties. Over 80 percent of the total assets were held in four counties, Bernalillo, Eddy, Lea and Santa Fe counties. Over 87 percent of the total giving was accounted for by funders in those same four counties. First among these was Santa Fe, which alone represented 58 percent of total giving by New Mexico foundations followed by Bernalillo (16 percent), Lea (7 percent), and Eddy (6 percent) counties. The largest New Mexico foundation by asset was the JF Maddox Foundation based in Hobbs, New Mexico serving Lea County. The top New Mexico foundation by giving was the Lannan Foundation based in Santa Fe, NM. (For a list of top New Mexico-based funders by assets and giving, see newmexico.foundationcenter.org.)

New Mexico-based Foundation Assets by County, 2015



Source: Foundation Center, 2018.

The Focus of New Mexico Giving

GEOGRAPHIC FOCUS

Non-New Mexico Grantmakers Account for the Majority of Foundation Support in the State

In 2015, New Mexico-based foundations provided 13 percent and non-New Mexico foundations provided 87 percent of the grant dollars received by New Mexico organizations. Just over 190 New Mexico foundations awarded 1,274 grants totaling \$23.7 million, and over 1100 Non-New Mexico foundations awarded 2,886 grants totaling \$153.4 million to New

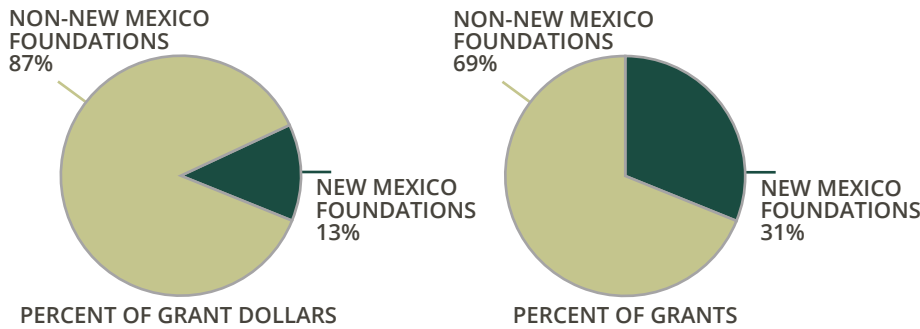
Mexico recipient organizations. The top four largest out-of-state funders were Shelby Cullom Davis Charitable Fund (\$49 million to United World College of the American West), GE Foundation (\$39 million), W.K. Kellogg Foundation (\$12.9 million) and the Daniels Fund (\$3.8 million).

The top four largest in-state funders were Lannan Foundation (\$13.1 million), JF Maddox Foundation (\$5.2 million), Thornburg Foundation (\$5 million) and the McCune Charitable Foundation (\$5 million). (For a list of top 25 New Mexico and non-New Mexico funders by giving, visit newmexico.foundationcenter.org.)

Half of all New Mexico Foundation Grant Dollars Stay in the State

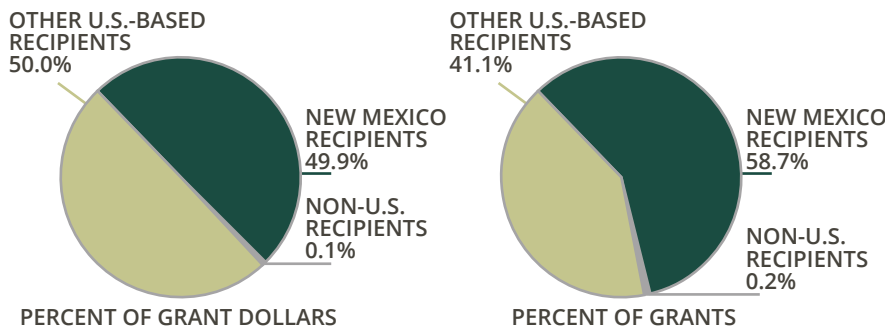
The New Mexico foundation community is made up of funders with local, regional, national and international interests. Therefore, a considerable share of giving is directed to recipient organizations outside of the state. Roughly half of grant dollars awarded by these foundations went to recipient organizations within the state, the other half were awarded to organizations based in other parts of the country, and less than 1 percent were awarded to recipients outside of the U.S.

Foundation Giving to New Mexico Recipients from New Mexico and Non-New Mexico Foundations, 2015



Source: Foundation Center, 2018.

Geographic Distribution of New Mexico Foundation Giving, 2015



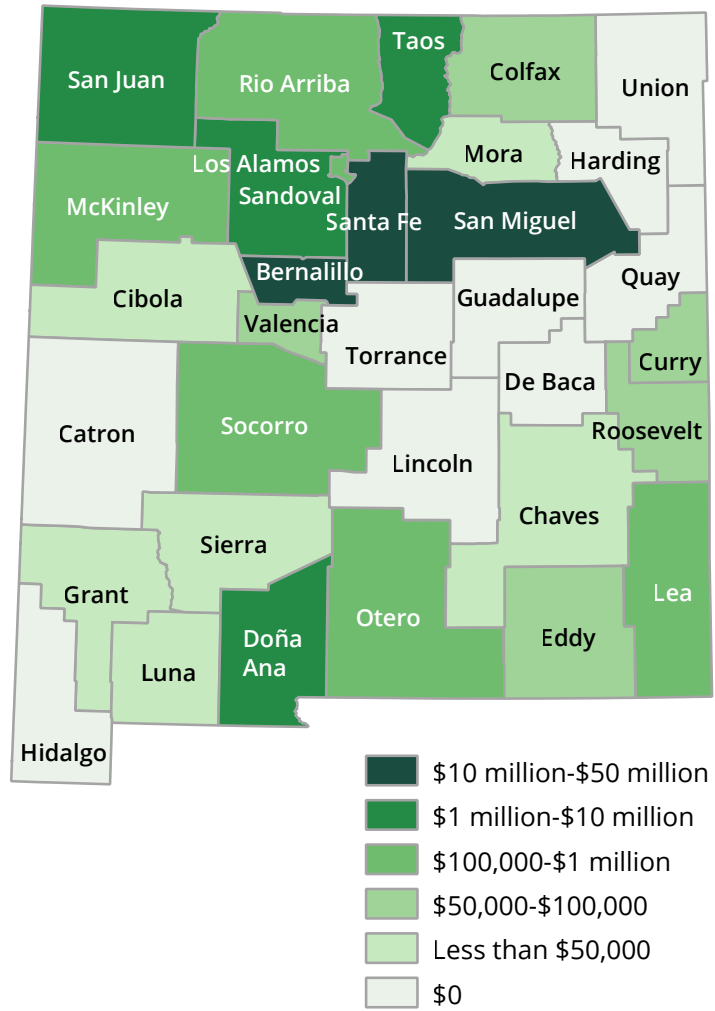
Source: Foundation Center, 2018.

Grant Funding is Concentrated in Urban Areas of the State, Leaving Many Rural Communities Underfunded

Recipient organizations in 24 of the 33 New Mexico counties received grant funding in 2015. Bernalillo County received the largest share of foundation support in both grant dollars and number of grants. Overall, Bernalillo County organizations received just over 36 percent of grant dollars awarded in the state and 41 percent of the number of grants. Following Bernalillo County was Santa Fe County (158 grants totaling \$23.2 million), followed by Doña Ana County (130 grants totaling \$2.7 million). Foundations also provided funding to other regions of the state, with an additional three counties reporting foundation grants totaling \$1 million or more in 2015. (San Miguel County was an exception in 2015 having received a one-time \$49 million to United World College of the American West.)

Eleven, mostly rural counties, received less than \$100,000 in grants in 2105 and nine counties received no grant funding, leaving 60 percent of New Mexico counties with limited or no giving. These nine counties include mostly or completely rural areas of the state including Catron, De Baca, Harding, Hidalgo, Lincoln, Torrance, and Union counties. Data do not include re-granting from statewide organizations. (Source: U.S. Census Bureau, 2010 Census, Summary File 1, Table P2.)

Foundation Giving to New Mexico-based Recipients by County, 2015



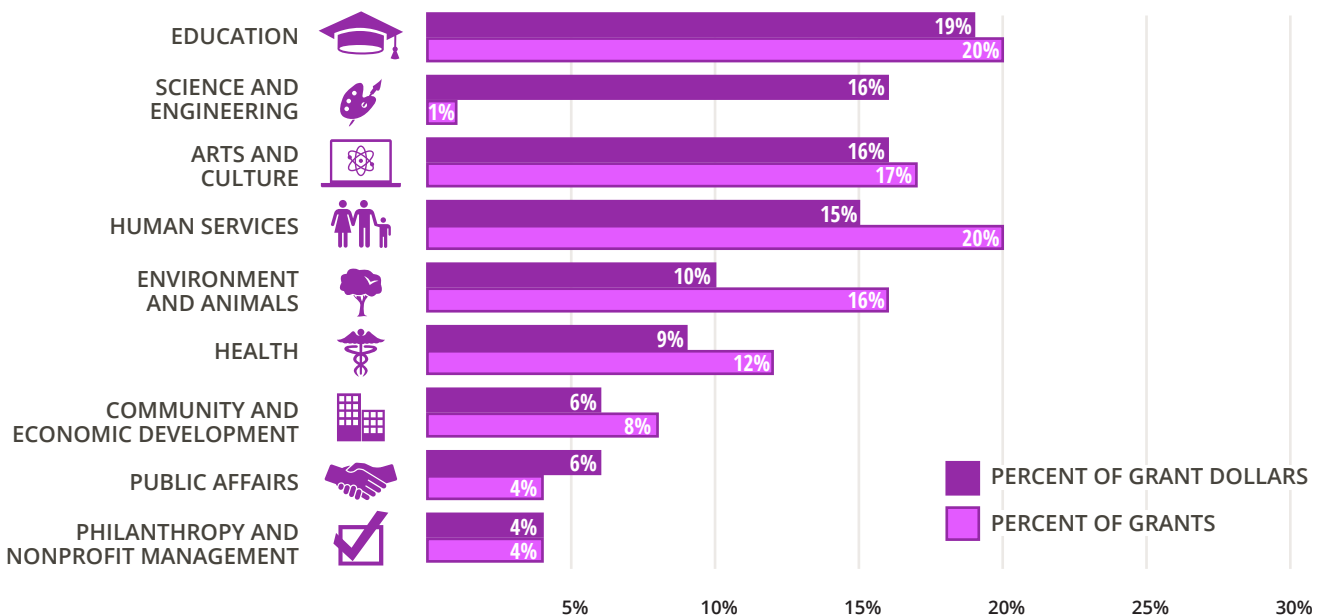
ISSUE FOCUS

Education, Arts and Culture, Science and Engineering, and Human Services Represent Top Funding Priorities in New Mexico

Subject areas describe the grantmaker areas of focus, primary work of nonprofits and activities being funded. New Mexico foundations granted the majority of 2015 total giving in four subject areas, education (19 percent), science and engineering (16 percent), arts and culture (17 percent), and human services (20 percent).

Source: Foundation Center, 2018.

New Mexico Foundation Giving by Issue Focus, 2015



Source: Foundation Center, 2018. Includes issue areas accounting for at least 4 percent of grant dollars or grants. Grants may occasionally be for multiple issue areas and would thereby be counted more than once.

arts and culture (16 percent), and human services (15 percent). Science and engineering received much larger grants relative to education, arts and culture, and human services. Independent and family foundations account for the vast majority of grant support in these four areas.

While arts and culture continues to be a top funding priority, there was a decrease in arts and culture funding from 45 percent of total giving in 2013 to 14 percent in 2015. Grants for science and engineering spiked from .01 percent in 2013 to 14 percent in 2015. Funding for education and human services have increased steadily since 2013.

Foundation Center categorizes grants by subject area according to the Philanthropy Classification System (PCS), see [taxonomy.foundationcenter.org](#).

POPULATION FOCUS

Children and Youth and Economically Disadvantaged are Priority of New Mexico Foundations but Ethnic and Racial Groups Remain Underrepresented

The population focus details group characteristics (age, sex, race/ethnic heritage, etc.) of the population(s) being targeted as the intended beneficiary of support and services being provided. The top four population groups targeted by New Mexico foundation giving in 2015 are children and youth (23 percent), economically disadvantaged (15 percent), people with disabilities (6 percent), and ethnic/racial minorities (5 percent). Ethnic/racial minorities received 10 percent of grant support nationally in 2014. Given that New Mexico is a majority non-white state, one would expect this distribution to be greater than the national levels. Overall, more than three quarters (77 percent) of foundation grants to New Mexico recipient organizations could be identified as providing a

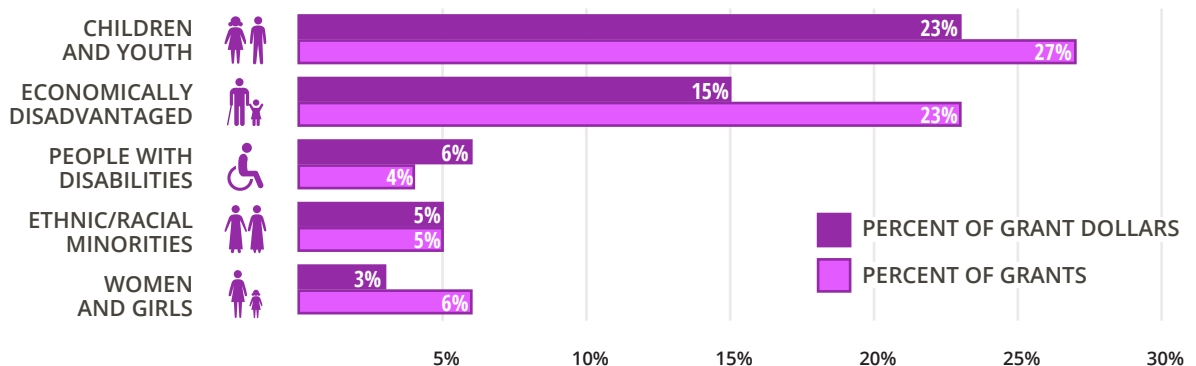
benefit for specific populations. Foundation Center categorizes grants by population according to the Philanthropy Classification System (PCS), see [taxonomy.foundationcenter.org](#).

SUPPORT STRATEGY FOCUS

General Operating, Program Support, and Capital Infrastructure Gains, Organizational Development Lags

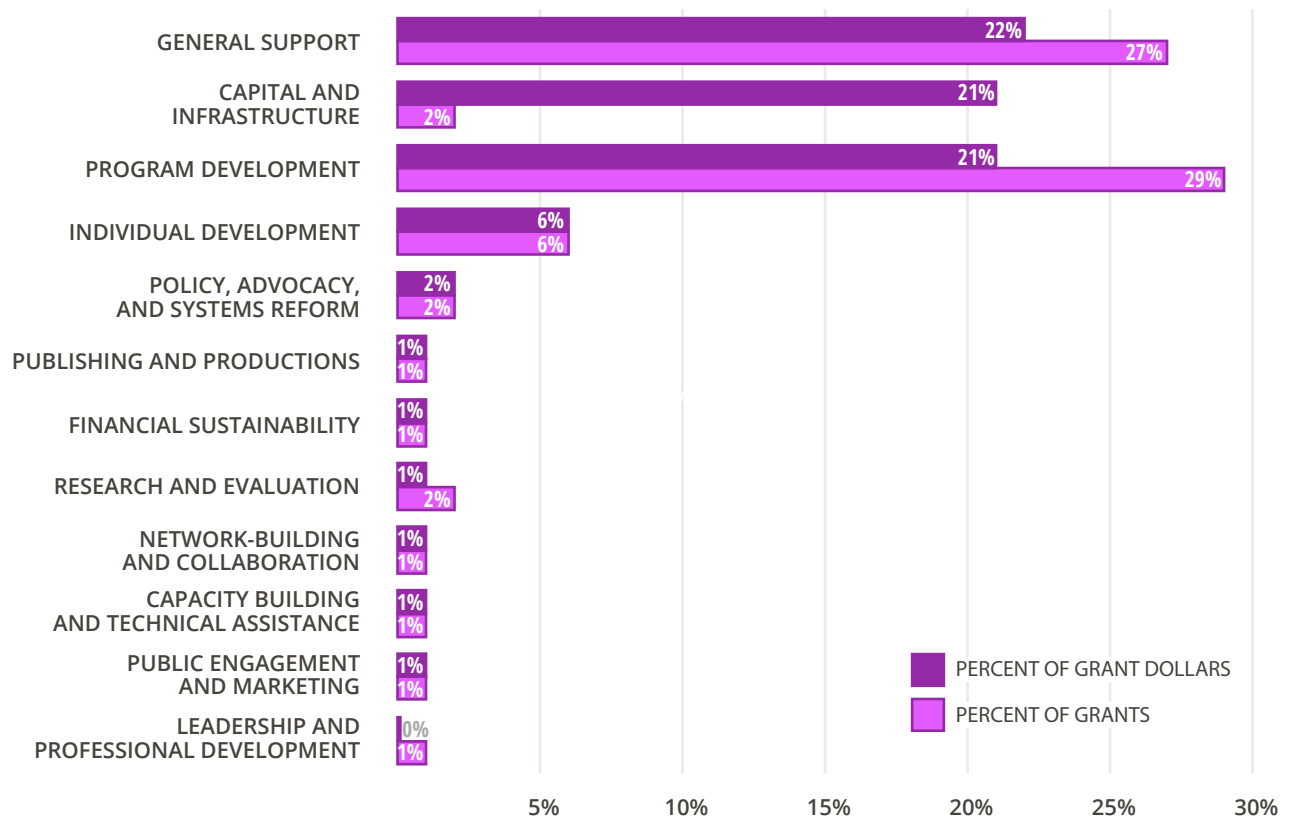
Support strategies describe the goals of a program or grants being implemented or supported. New Mexico foundations granted the majority of 2015 total giving in three support strategy areas, general operating (22 percent), program support (21 percent), and capital infrastructure (21 percent). This compares with amounts reported nationally in general operating (23 percent), program support (52 percent), and capital infrastructure (10 percent).

New Mexico Foundation Giving by Population Served, 2015



Source: Foundation Center, 2018. Figures represent only grants awarded to groups that could be identified as serving specific populations or grants whose descriptions specified a benefit for a specific population. These figures do not reflect all giving benefiting these groups. In addition, grants may benefit multiple population groups, e.g., a grant for economically disadvantaged youth, and would therefore be counted more than once. Includes population groups accounting for at least 4 percent of grant dollars or grants.

New Mexico Foundation Giving by Support Strategy, 2015



Source: Foundation Center, 2018. Grants may occasionally be for multiple types of support strategies and would therefore be counted more than once.

The other 12 support strategy focus areas comprise the remaining 36 percent of total giving that includes support for organizational development and capacity building. These underrepresented focus areas include technical assistance, financial stability, leadership and

professional development, network building and collaboration, policy advocacy and system reform, and public engagement and marketing. (The National Center for Responsive Philanthropy has identified that “inadequate organizational capacity” is one of the key barriers identified

that constrains grants to rural nonprofits by regional and national foundations.*) Foundation Center categorizes grants by support strategies according to the Philanthropy Classification System (PCS) [taxonomy. foundationcenter.org](https://www.foundationcenter.org).

* Source: NCRP, Rural Philanthropy, Building Dialogue from Within, 2007

Data Source

Foundation Center

Foundation Overview

Data from the New Mexico Philanthropy Community section is based on Foundation Center's grantmaker database for circa 2015 which includes all independent, corporate, community, and operating foundations making grants of at least one dollar during the relevant fiscal reporting period. Sources of data for these 86,000+ foundations include IRS information returns (Form 990-PF), foundation reports, and information reported to Foundation Center on annual surveys of the top foundations by total giving. Assets are stated at market value. Total giving amount includes grants, scholarships, and employee matching gifts; it does not include all qualifying distributions, e.g., loans, PRIs, set-asides, and program or other administrative expenses.

Foundation Giving and Priorities

Grants-level data found in the "Focus of New Mexico Giving" section comes from the New Mexico Foundation Dashboard at newmexico.foundationcenter.org. The dashboard data comes from Foundation Center's Foundation Maps database of all publishable grants, foundation administered programs, program-related investments, and grants to individuals. These data points update weekly based on available information; totals for the most recent years will likely change as new grants are added to the database.

Sources of grants data include IRS information returns (like IRS Form-990 and Form 990-PF) and information reported directly to Foundation Center through the Electronic Reporting Program from private and public grantmaking foundations in New Mexico. These grants are indexed according to the Philanthropy Classification System (PCS) which structures the data available in the grant details along the issue, population, and strategy focuses of the grant.

Limitations

Available grants data percentage represents the completeness of the data available for a given year relative to the known amount of total giving for the year. Comparisons to earlier data points should only be done after at least 50 percent of the total giving is represented by the aggregate grants data.

Lags in information flows between the IRS and Foundation Center can delay information up to 18-24 months after a foundation submits their tax return. Foundation Center is committed to sharing data as soon as it is available.

In order to improve the completeness of the data available for your region, please consider submitting your grants directly through the Electronic Reporting Program. Email egrants@foundationcenter.org for more information.

Definitions and glossary of philanthropic terms can be found at cof.org/content/glossary-philanthropic-terms.



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