

The NMAG Journal

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

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In This Issue

Parting Words to Solve a Dilemma

Skip the Jargon

Member News

2009 Board Slate

NMAG Member Programs

Articles of Interest

Foundation Center Highlights

Guest Column

Sanford Brickner, Trustee
Brickner Charitable Trust

Parting Words To Solve a Dilemma

Dear Fellow Grantmakers:

As the end of 2008 approaches, I would like to thank you for giving me the opportunity to serve you as a member of the board of the New Mexico Association of Grantmakers these last four years.

As I prepare to leave the board, I would like to share with you briefly my personal history with charitable giving in New Mexico and end by making a suggestion.

My wife Jane and I came to New Mexico in 1983 when I gave up my law practice to become a ski instructor, a profession which I have pursued these last 25

President's Report

Everyone these days is thinking about the economic crisis. As philanthropists, we are concerned about threats to the sustainability of nonprofits in hard times, as well as the future of foundation giving and investments. Having used the term "sustainability," I urge you to read Billie Blair's reprinted New Mexican column on jargon in this field (see below).

Our November 19 annual meeting luncheon, which over 50 of you will be attending, has been designed around the theme, "The Financial Crisis: Implications for Grantmaking and Asset Management." Board and staff will be listening intently during the session to your needs and views as NMAG tries to find ways to help members effectively work together. For more information on the event, refer to Future Programs.

At the risk of dating myself, I have been in the foundation field over 30 years. In the early 1980s I was project manager on a study that sought to understand why foundation assets were waning. The next two decades, though, were periods of huge growth, both in the number of new foundations and assets of those already in existence. While foundation assets may have been declining in the last few months, the field has seen extraordinary financial gains leading up to the current situation.

Let's not over react and cut back too much in this time of increased need. In 1999, the National Network of Grantmakers commissioned Columbia University economist Perry Mehrling to study "Spending Policy for Foundations." He made a compelling case for increased grants payout, especially during down times, arguing for the greater value of funding that solves social problems today. Please read Sandy Brickner's column in this issue for more on payout and express your own views at the annual meeting and in future newsletters.

According to Phil Buchanan of the Center for Effective Philanthropy, "In this moment of change, challenge, and opportunity, funders need to reach out and hear from those upon whom they depend to achieve impact." He is referring, of course, to the nonprofits we fund and trust. I would urge you to consider additional meetings with grantees or convening them, listening, and asking for their creative input as part of your decision-making process. Of course, whatever decisions are made, be sure and communicate them in a timely and transparent manner to any groups that will be affected.

Finally, let's consider collaborating more with each other. Over the last several years New Mexico funders have made a real difference in changing perceptions about alternative energy and climate change, as well as with grants to Latino groups (Hispanics in Philanthropy), and on initiatives to curtail teen pregnancy (Unidos). The newest collaborations around hunger (New Mexico Plan to End Hunger), and to build community (Women of Color Leadership) offer hope and solutions.

years.

My interest in charitable giving expanded after using a charitable remainder trust to avoid the capital gain on the sale my interest in a pension administration company. My first charitable contribution in New Mexico was to benefit Partners in Education, which at that time was part of the Santa Fe Community Foundation.

I subsequently joined the board of the Santa Fe Community Foundation and became its chair in 1994, and in 1999 served as a board member of the Northern New Mexico Grantmakers, the predecessor of our current organization.

So much for my history. Now for my suggestion to help solve what I perceive as a current dilemma.

Here is the dilemma.

Rising unemployment is placing greater demands on nonprofits to provide social services. To provide these additional services, nonprofits will require larger grants from foundations, as well as from individuals.

At the same time many foundations, as well as individuals, because of significant investment fund losses during this economic downturn, are planning to reduce, not increase, the amount of grants they are intending to make.

While private foundations are penalized if they fail to grant at least 5% of their net investment assets, there is nothing to prohibit them from granting a greater amount now and reducing their contributions in subsequent, and perhaps less needy years.

By way of compromise, perhaps funders could grant at least the same dollar amount they

Finances, Fundraising and Membership

We feel fortunate that our financial situation is good. At the end of October NMAG has cash reserves of \$36,000. We had raised 95 percent of our projected revenue for 2008 and spent 86 percent of the budget.

I am thrilled to report that the Daniels Fund has awarded a \$25,000 general operating grant to NMAG. While we will be receiving those funds by the end of the year, they will be used in 2009. Since the last newsletter, between program grants and general operating support we have received \$23,000: from the Brindle Foundation; the LANL Foundation; the Nirvana Manana Institute; and the Ronald Simon Family Foundation for core support; as well as, the Con Alma Health Foundation for the Advocacy Workshop; the Santa Fe Community Foundation, Taos Community Foundation, and United Way of Santa Fe County respectively for the New Mexico Grantmakers Directory; and from the Nonprofit Voter Engagement Network. The Livingry Foundation and the McCune Charitable Trust awarded us additional grants to help balance the budget. We have a few pledges outstanding that I hope to bring in by the end of the year. Of course, we always welcome unexpected checks. Feel free to give more.

I made a trip to Hobbs and Roswell in early October, primarily to maintain good member relations, but also to promote the New Mexico Grantmakers Directory. My meetings in the southeastern part of the state reinforced a general sense that every member should receive a personal get-together with me or a board member at least once a year. Along with the Taos Community and Cudd Foundations, NMAG is planning a funder convening in northern New Mexico for early next year.

Past Programs

On August 27, the annual Summer Soiree was held at Gay Dillingham's home. Many thanks to Gay and Andrew for opening up their home and garden, as well as putting on such a good party. Everyone enjoyed the conversation, festivity, food and wine (provided at cost by member John Silver). Some 40 people attended.

On September 10, NMAG co-sponsored two programs. The morning workshop on "Funding Advocacy," with trainer Abby Levine from the Alliance for Justice, focused on legal issues surrounding advocacy, campaign and public policy funding and nonprofit work. Participants numbered 28. It was our most highly ranked session of the year on content, presenter knowledge and overall program.

That afternoon, NMAG co-hosted a different workshop with the Nonprofit Voter Engagement Network that was less well attended, especially by funders, although the information presented was excellent. The Center for Nonprofit Excellence, Con Alma Health Foundation, and Santa Fe Community Foundation were co-sponsors. This was primarily a service to the nonprofit community, for which NMAG received a small grant.

On September 19, NMAG co-sponsored a special invitation event on "Energy Solutions for the 21st Century," with the Livingry Foundation and the New Mexico Environmental Law Center. Arjun Makhijani, PhD, President, Institute for Energy and Environmental Research, presented findings from his new book Carbon Free and Nuclear Free: A Roadmap for U.S. Energy Policy and Ed Mazria, AIA, Founder, Architecture 2030, discussed his new work "Energy Independence Within Reach." Some 32 people attended.

granted last year to these needy agencies, even if such amount exceeds the percentage of investment assets previously granted.

This would not solve all the problems of these nonprofits, but would help reduce the burden on them.

Nonprofits Need to Skip the Jargon

*Billie Blair, President
Santa Fe Community Foundation*

The Community Grants Cycle at the Santa Fe Community Foundation has brought out the word curmudgeon in me again. What are all these fancy labels: capacity, cultural competency, sustainability?

Can we just learn to say what we do in plain English?

One of our applicants says the organization "guides youth in developing the intrinsic motivation needed to commit to creating a positive future, which leads to continuing their education, making positive choices, the building of developmental assets, individual protective factors, self-concept, self control and social responsibility." When my partner, a bright young member of Future Santa Fe, and I conducted the site visit, we learned this means they help students stay in school, avoid drugs and alcohol, stop school bullying and curb suicide attempts, teen pregnancy and youth gang activity.

There is never just "programming." It is almost always "innovative." Does that mean it has never been done before? Nonprofits don't have people they help; they have "constituents." Do their constituents know they are - almost all of them - "at risk?" At risk of what?

NMAG's Affinity Group on Children and Youth convened on October 21, with a focus on infancy through age 5 initiatives and programs in New Mexico. A record (for affinity groups) 19 funders attended. This session was spearheaded by Nan Schwanfelder and Kim Straus of the Brindle Foundation and co-chaired by Lynn Hathaway and the City of Santa Fe Children and Youth Commission. Notes have been circulated to participants, and are in the members section of our website. Many present indicated they might be interested in pursuing some joint efforts in the future.

The October Mini-Conference on Health Policy was cancelled. Committee leadership felt we needed a longer planning period to pull it off in the manner we would like, as well as a better idea in advance of what role funders might play in any health reform process.

Other NMAG Work

Gay Dillingham and I have been steadily pursuing the agenda developed out of the July NMAG Water Mini-Conference. I wrote/paraphrased an Executive Summary of the notes of the convening and edited the full report prepared by facilitator Lucy Moore (available on the NMAG website.) We made a presentation to the New Mexico Water Trust Board (WTB), as a follow-up on recommendations from the Mini-Conference and have held a series of other meetings on the topic with different experts and policy makers since our July convening. The suggestion that a Public-Private Initiative be explored, and also that private philanthropy might augment the grantmaking of the SWT was unexpected. While Gay made it clear that philanthropy could not take over the role of government, I suspect we will be hearing more requests like this in the future as state resources decline.

At the Board meeting last month we discussed the advisability of future initiatives and what we are learning from this one. While there was considerable member support for looking more deeply into water issues in New Mexico, we run the risk of not engaging all our members by focusing in one area. Water has been a particularly complex and more politically charged subject.

Of course, it's not really true that we've only been working on water. Since our last newsletter, the Children's Cabinet met twice. I was actively involved in the Early Childhood Investment Committee appointed by the Lt. Governor. That Committee made recommendations on a number of public financing mechanisms for early childhood programs in New Mexico on October 29.

Our Public Policy Committee will be meeting on November 20 at 1 pm. We welcome additional members. We have been hearing rumors that some legislators may be offering bills that affect foundations and other nonprofits and we want to follow those developments closely.

Initiatives and public policy work take time. We have limited staff capacity (another use of jargon) at NMAG. We are most fortunate that as Board Chair, Gay has been putting considerable energy into the water initiative. I thank her and the entire Board for their leadership, as well as approving a budget that allows me to work four days a week in the coming year.

Respectfully submitted,

And, of course, it's "collaborative." That usually means nonprofits say they work with each other because they know we like that.

What makes the people who work at nonprofits think they have to use obscure words to describe very concrete benefits they provide? And it's not just Santa Fe.

Barriers to employment. The new media director at Goodwill International noticed leaders using that phrase. She parsed it down. It's just people having a hard time finding a job. They may be poor, have a disability, have been on welfare, lack education or job skills.

Disparities in health outcomes. The executive director of one of our fellow community foundations in Pittsburg came on the job with this as the organization's stated goal. He learned it meant that African Americans in the Pittsburg area got sick and died at a higher rate than whites.

Rehabilitation services designed to enhance the lives of women. One columnist learned that it means they help women prisoners learn to read, get a GED and get off drugs.

Albert Ruesga, vice president for programs and communications at the Agnew E. Meyer Foundation, said people in the charitable world (and watch out, we are one in 10 of the working population) are "at best self important and at worst muddled and confused."

Our Foundation pleads guilty. When we went to the community a few years ago to ask what people saw as needs in Northern New Mexico the mantra was one word: "Sustainability." At long last a community planner defined that term so my pea brain could

Terry Odendahl
November 17, 2008

NMAG 2009 Board Slate

Proposed New Board Members

Linda Anderson, Domanica Foundation
Rita McCusker, Daniels Fund
Randy Royster, Albuquerque Community Foundation
Steve Simon, Ronald M. Simon Family Foundation

2009 Officers

Gay Dillingham, Chair
Elizabeth Crittenden Palacios, Vice-Chair
Dolores Roybal, Secretary
Tripp Killin, Treasurer

Our sincere thanks to departing Board Members Rick Abeles, Sandy Brickner, and Blair Naylor, for their years of service to New Mexico Association of Grantmakers. You will be missed!

NMAG Member Programs

Wednesday, November 19 at noon, Inn and Spa at Loretto, NMAG Board Chair, Gay Dillingham of the Livingry Foundation, will moderate a members' only dialogue. Five colleagues have agreed to start the conversation with short presentations: John Ulrich, Board Chair of the New Mexico Community Foundation and Principal, Strategic Wealth Management, Inc., as well as Blair Naylor, Trustee of the Cudd Foundation and Principal, Palace Capital will lead off with their views on foundation portfolio management issues. Steve Rasmussen, Executive Director of the Messengers of the Healing Winds Foundation will address both the grantmaking and financial side, followed by Dolores Roybal, Executive Director of the Con Alma Health Foundation and then Linda Anderson, Executive Director of the Domanica Foundation, who will give specific examples of how their foundations are creatively dealing with the crisis. The session is designed as a dialogue and we want to hear and learn from all attending.

On **December 4, at 3:00** NMAG will join with the National Committee for Responsive Philanthropy in sponsoring a briefing, followed by a reception, to unveil 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. You should all have gotten invitations in the mail. Please RSVP soon.

Lt. Governor Diane Denish will welcome New Mexico and national funders as well as representatives of the groups studied. Five NMAG members are participating on the host committee - Gay Dillingham, Elizabeth Crittenden-Palacios of the Taos Community Foundation, Dolores Roybal, Frank Sanchez from the Needmor Fund and Randy Royster of the Albuquerque Community Foundation -- to ensure that funders recognize the importance of this work and will attend the event. The embargoed report, which I have reviewed and edited, uses quantitative and qualitative methods to measure impact and the positive returns to social capital from civic engagement. By documenting impact and results the project will provide useful tools and grantmaking options for funders, and will help to increase philanthropic support for this work nationwide. The

grasp it: "Meeting the needs of the present without compromising the ability of future generations to meet their own needs."

I plead personally guilty. I have begun to say "we seek to learn" when what I really mean is "we want to know." Or "convene around" when, in fact, we are not circling a problem --- or maybe we are.

Experts recommend that those of us who are afflicted with this muddling disease check "Bullfighter," created by the authors of Why Business People Speak Like Idiots, which is available online. Others recommend running the Flesch Reading Ease Scale, which is available on most Microsoft tool bars.

I checked this column with Flesch, and it is at close to the tenth grade level. Newspaper reporters are supposed to write so an eighth grader can understand. Take out the gobbledygook, and this column ranks as readable for eighth graders.

Jargon, get thee away!

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Member News

The Santa Fe Community Foundation has hired a new Program Director, Christa Coggins, who will start in January. Most recently, Christa has been working with New Energy Economy.

Sandra A. Edelman,
former Executive Director
of the Chamiza

findings are excellent, but you have to show up to hear them.

January, 2009 will be a busy month. At Blair Naylor's suggestion, we are planning a Family Foundation Affinity Group brownbag meeting. Phil Howell at the Frost Foundation has agreed to host. On **January 28, from noon to 2:30** at the McCune Foundation Conference room, NMAG, the McCune and Turner Foundations are co-hosting a briefing by noted UNM Law Professor Denise Fort on "New Mexico Water: Environmental Sustainability." This session is a follow-up to the mini-conference NMAG held in July.

On **February 5**, in collaboration with the New Mexico Community Foundation, which has generated the interest of several other funders in the state, NMAG will offer a program on "Women Building Community."

We are coordinating with the Census Bureau regarding a potential **March** session on the importance of getting an accurate count for 2010 and the ways in which funders and nonprofits can assist and benefit.

Native Americans in Philanthropy (NAP) is holding their national conference at Tamaya in early **April** and we will offer several sessions in partnership with NAP around the theme of "Developing Investment Partnerships in Native America."

We actually have a few more programs in the works for next year, but will announce them as they get closer. Please let us know what you might be interested in learning about, sharing or underwriting.

We are planning on offering our traditional conference in early **November, 2009**, and considering Roswell as the site. Please let us know if you have any problems with the timing or venue. We are also recruiting volunteers to serve on a conference committee. Call or email us with suggestions.

Articles of Interest

Steven Lawrence, "[Past Economic Downturns and the Outlook for Foundation Giving](#)", The Foundation Center, October, 2008

Leslie R. Crutchfield & Heather Grant McLeod, "[Change the Way You Change the World: A Model for Wide-Scale Social Change](#)."

According to a recent survey by Harris Interactive, more than half (56%) of engaged Americans cannot name a foundation on the first try. Even fewer can cite examples of foundation impact. "[Philanthropy Awareness Deficit](#)"

Chronicle of Philanthropy, "[Philanthropy and an Obama Administration](#)"

Foundation, from 1989-2006, died in late October, 2008.

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

**The NMAG Journal,
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Highlights of Foundation Yearbook

Foundation Growth, Giving and Assets Through 2006

- Number of grantmaking foundations exceeded 72,000
- Giving by the nation's grantmaking foundations grew 7.1 percent to \$39 billion
- Assets of all active U.S. foundations grew 11.6 percent to \$614.7 billion, setting a new record
- For the 25 largest foundations, assets increased 9.5 percent
- Gifts into foundations totaled \$36.6 billion, up 16.2 percent from the prior year

The Foundation Center, *Foundation Yearbook, 2008.*

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