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The NMAG Quarterly

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

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Many thanks to the NMAG Conference Committee members: Pamela Chavez, Don Chalmers Ford; Catherine Conran, PNM Resources Foundation; Tripp Killin, Killin Endowment Fund at the Albuquerque Community Foundation; Marilyn Mason, Mason and Associates; Lisa Oppenheimer, Oppenheimer Brothers Foundation; and Dolores Roybal, Con Alma Health Foundation for their good thinking and hard work.

Guest Column

Tripp Killin, Killin Endowment Fund

New Kid on the Block

A theme of my early life was becoming "the new kid on the block" as my Air Force family was re-stationed. I found myself in a similar professional place about 4 years ago as I fulfilled my dream of working in the conservation movement. (I took a development position at the New Mexico Wilderness Alliance.) At the same time, I became involved in philanthropy, both through my wife's family's

President's Report Terry Odendahl

I have had a stimulating first six months at the helm of NMAG. It is a pleasure working with an engaged, intelligent board, conference committee and membership. It's also marvelous to have Susan Cantor as a colleague. We are a team, and have enjoyed putting together nine programs, as well as convening two active affinity groups and organizing others.

Our 5th Annual Conference will be in Albuquerque this year, November 7-9, at the Embassy Suites Hotel. Gara La Marche, the new CEO and President of Atlantic Philanthropies (which just made a \$20 million grant to New Mexico middle schools through the NM Community Foundation) has agreed to give one of the keynote addresses:

http://atlanticphilanthropies.org/about/ceo_message (for more information on him). We're lining up an exciting group of speakers on the general theme: **Strategic Grantmaking: Collaborate, Commit, Succeed**. So far, in addition to La Marche, our confirmed speakers and workshop presenters include: Mark Bennett and Joan Gibson on Strategic Decision making; Eric Griego, the new Executive Director of NM Voices for Children, focusing on quality of life in NM; Tripp Killin on being a small fish in a big pond (I commend his thoughtful guest column in this newsletter); Michael Kramer on Mission Related Investments, Michele Prichard of the Liberty Hill Foundation in Los Angeles on the many funding collaboratives she has facilitated over the years; Nancy Pope on the NM Hunger Initiative; Brian Shields on the Coalition for the Valle Vidal and other collaboratives. We are also excited that Theatre Grottesco will be treating us to a special short performance at the Wednesday evening reception. More information and speaker announcements will come your way soon.

Last month I attended two strategic planning sessions, both to do with philanthropy of course. The first was our own NMAG Board/Staff retreat. The NMAG Board and staff (small s because it's really just Susan and me) participated in a productive day-long strategic planning retreat, facilitated by Toby Herzlich. We left in agreement that the primary purpose of NMAG is to:

- Educate grantmakers
- Create statewide impact
- Facilitate collaborations by bringing in multiple entities to affect policy change
- Develop more philanthropy in New Mexico

This will help focus our future work. If you look at our existing brochures and materials, the former list of activities was much longer.

Four key goals for NMAG in the next three years will be to

foundation and with a small donor advised fund at the Albuquerque Community Foundation. Giving money and asking for money: a new kid on two new blocks. Often times, I've been struck by the similar difficulties faced by the staffs of both non-profits and foundations, especially in the realm of collaboration.

It seems obvious that no non-profit or foundation has the resources to "do it alone". This creates an equally obvious imperative for groups to collaborate. But collaboration is both time consuming and difficult, especially for organizations with small staffs. In these organizations, workers have wide responsibilities and thus lack the time to focus in any one area. And because the world is full of potential collaborators, but the organization's small staff is the only candidate to write the next newsletter or review that stack of proposals over there, collaboration tends, by a natural process, to be de-prioritized and relegated to a distant future. So, the primary barrier to collaboration is available staff time.

The secondary barrier is trust. This is because all collaboration involves a surrender of control. It is a simple fact that a decision made by a group is less likely to represent narrow interests than one made by an individual. Thus, deciding to work with others requires a lessening of our control. But who among us will give up this control? Who in the funding community will lightly sacrifice some aspect of their donor's intent, or their staff priorities, to give scarce resources to activities defined by a group of "outsiders"? And who in a non-profit organization will readily risk the integrity of their missions and the employment of their colleagues to do the same? The answer is no one - unless the parties deeply trust those with whom they are

- Identify and take action on specific issues that would benefit from focused grantmaking
- Influence public policy toward systemic change
- Increase and diversify membership, particularly recruiting funders from outside New Mexico that take an interest in our state
- Enhance leadership, structure and technology.

Board members Rick Abeles and Blair Naylor have agreed to work with staff to create a goals and objectives framework. An executive summary and the full notes of the retreat are on our website - <http://www.nmag.org/about.php>. Please visit it. We welcome your comments and ideas. The Board will revisit their decisions and our action plan at their meeting in early September.

My second retreat last month concerned the National Committee for Responsive Philanthropy (NCRP) in the Washington, DC area, my final meeting as a board member of ten years and recent past Chair. While there were obvious differences: NMAG is a state-level organization and NCRP is national; our/NMAG's facilitation was much better; NCRP's budget has more 0s at the end -- I'm struck by the similarity of results. Both groups decided that to be effective, we need to focus our work more. And, while NCRP still considers itself a watchdog of philanthropy and promoter of best grantmaking practices, they decided the more pressing need was to advocate for moving money to social and economic justice efforts. As with NMAG, there was also considerable discussion at NCRP of its public policy role.

In April, Ben Maddox, Chair of NMAG's Board and a trustee of the J. F. Maddox Foundation, did an excellent job of moderating a panel on **Public Education in New Mexico**. We combined our monthly program with the New Mexico Commission on Community Volunteerism, Governor's Conference on Volunteerism and increased our normal attendance substantially, although it was a noisy crowd, not your normal polite philanthropists.

Billie Blair, Vice-Chair of NMAG and President of the Santa Fe Community Foundation, and I made a successful recruiting trip to the southern part of the State in May. We met with 18 funders from Artesia, Carlsbad, and Roswell at a luncheon in Roswell, thanks to one of our new members, Sara Armstrong of the Armstrong-Clark Foundation. Many thanks to Sara and her husband, Bob, for hosting the event. Several current members attended, but we met more new prospects and learned about their grantmaking efforts. The next day we headed to Las Cruces to visit with the Community Foundation of Southern New Mexico. We have a goal of having all the community foundations in the State within our membership.

Messengers Foundation underwrote a stimulating **Dialogue between Pablo Eisenberg and Bill Schambra**, in which they debated, but mainly agreed upon, the future of philanthropy in this country. It was both informative and entertaining - perhaps they should take their show on the road. This was videotaped and DVDs are available by contacting Susan.

Our latest program, in June, was **The Challenge and Power of Inclusion: Reframing Giving and Grantmaking**. This was a panel discussion about how "deep diversity" can enrich the process and effectiveness of philanthropy. The panel included Donna Vogel, of the Chamiza Foundation; Roberto Chene, The Center for Intercultural Leadership; Brian Vallo, Cornerstones, Dottie Indyke, Creativity for Peace; and moderator, Mary Ellen Capek.

Along with the NMAG Board, Susan and I realize we've probably been

agreeing to work. To increase collaboration, therefore, we must deepen trust among the groups that will be working together.

I once saw a cartoon that showed James Joyce's to-do list:

- 1) Laundry
- 2) Forge in the smithy of my soul the uncreated conscience of my race
- 3) Call Mom

"Deepening trust" can seem as difficult as Joyce's second task. To do it, there is no option but a progressive and incremental risk-taking with potential collaborators. Put time, money and other resources on the line for a shared goal, and see what happens. Measure the risk by the amount of control your organization surrenders to the collaborative partners.

Obviously, this vague formulation can mean many things to many organizations. However, discreet steps can be taken to build trust between willing collaborators. While each step is often difficult and time consuming, it is the only way to reach the really big goals.

In my short time in the fields of conservation and philanthropy, I've been able to collaborate a bit. My thanks go out to Nancy Johnson at the Albuquerque Community Foundation for her advice and guidance. I would also like to thank Susan Cantor and Terry Odendahl at NMAG for their encouragement and hard work. And I'd like to thank Brian Shields at Amigos Bravos for our great working relationship on the Coalition for the Valle Vidal.

Upcoming NMAG Programs

Breaking Ground & Building Bridges: A Grantmaker-Grantseeker Forum. July 17, 9:00 - 12:00, Rancho de Las Golondrinas, La Cienega.

offering too many events, given your busy schedules. We hope you attend our two July programs and the August social at the Howells. Our Fall programs will be offered in conjunction with other grantmaking associations which are holding their national conferences in New Mexico this year: Environmental Grantmakers Association; Grantmakers in Education; and Grantmakers in the Arts. All these conferences are available to NMAG members at the member rates. The NMAG Board decided we want to have greater impact, beyond the educational programs. We will use the NMAG conference as a step toward this new goal. Following upon strategic planning decisions I am scheduling appointments with both the Attorney General and the Lieutenant Governor.

Please send us your ideas about how NMAG can add value to your funding, as well as your grants lists, job openings and the like. Have a great Summer!

Respectfully submitted,

Terry Odendahl, July 11, 2007

NMAG Member News

New Members

NMAG is pleased to announce two new member grantmaking organizations and to welcome back another:

Albuquerque Community Foundation (ACF), Randy Royster, Executive Director. The ACF operates primarily as a permanent collection of endowed funds for the long-term benefit of Albuquerque. ACF is a partnership of donors, nonprofit organizations, and the community working together to find solutions to pressing community needs. It administers a permanent endowment comprised of many gifts, large and small, and uses the earnings from that endowment to make informed, strategic grants to nonprofit organizations and educational institutions, and scholarships for students to continue their education.

The Biophilia Foundation, Richard Pritzlaff, President. This foundation, based in Maryland, supports efforts that protect, restore, enhance, and preserve wildlife habitat, and efforts which can help reconnect individuals with nature. The Foundation operates the Pritzlaff Ranch in San Ignacio, New Mexico, with Pueblo frescos of the 1940s, and continues a program of habitat restorations and enhancements on the 3,200 acre ranch. It also makes grants to environmental projects operating in the Southwest, Mid-Atlantic States, and nationally.

Max and Anna Levinson Foundation, Charlotte Talberth, Executive Director, makes grants to individuals and groups committed to developing a more just, caring, ecological and sustainable world, in which people have a greater ability and opportunity to determine directions for the future. The Levinson Foundation is re-joining, after a year's hiatus.

Con Alma Welcomes New Staff

Louise Tracey-Hosa has been hired as the Southern Outreach Program Coordinator at the Con Alma Health Foundation. Tracey-Hosa, served for the past 11 years as the Executive Director of La Piñon Sexual Assault Recovery Services of southern New Mexico. Her experience includes over 25 years of service as a manager and CEO of service delivery nonprofits

Spirituality and Values in Grantmaking. Affinity group meeting and luncheon. July 17, 1:00 - 3:00, Sunrise Springs Resort.

Annual Summer Social. August 18, 6:00 - ?, at the home of Mary-Amelia and Phillip Howell.

Philanthropy Conferences of Interest

Conference on Philanthropy and Rural America

Creating the 21st Century Agenda for Philanthropy and Rural America, August 7-9

For more information visit: www.cof.org

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

Recent News and Research Reports on Philanthropy

NCRP
CHARITABLE GIVING INCREASES DRAMATICALLY WITH RECENT BANK MERGERS

in New Mexico and Illinois.

Dianne Rivera, Program Officer, is a native of Albuquerque currently living in Santa Fe. She has experience in both the nonprofit and governmental sectors. Most recently Dianne served as the Deputy Cabinet Secretary, New Mexico Children, Youth & Families Department. In addition, she directed a nonprofit program in Las Cruces. She earned her BA and MA from New Mexico State University.

Perli Cunanan, Development Officer, formerly the Vice President of Development of United Way of Santa Fe County, has more than 10 years development experience. As the former Development Director of Youth Shelters and Family Services, she was instrumental in the construction of a new emergency youth shelter in Santa Fe.

Fond Goodbye

Stephen Patrick is leaving the New Mexico Community Foundation to become Senior Program Officer for Public Policy at the Bill and Melinda Gates Foundation in Seattle, WA. He and his family expect to relocate by July 31.

SVPNM Leadership Transition

Tamara Bates has stepped down as Managing Partner of Social Venture Partners NM to pursue her own entrepreneurial endeavors in the arts community. **Trevor Loy**, Founding Partner, will assume the role of Managing Partner for the duration of this year. We wish Tamara all the best in her new pursuits.

Grants Awarded to NMAG

On behalf of the Board, Membership and Staff, thanks to the following new funders (since the March Newsletter) for general operating and program support to NMAG:

- Azalea Foundation
- Brindle Foundation
- Cudd Foundation
- Daniels Fund
- Delle Foundation
- Domanica Foundation
- Frost Foundation
- Messengers of the Healing Winds
- Oppenheimer Brothers Foundation
- PNM Foundation
- Ronald M. Simon Foundation
- Thornburg Charitable Foundation

Absence of Major Disaster in '06 Affected Giving

By STEPHANIE STROM / NY Times
June 25, 2007

Although 2006 was heralded as the dawn of a golden age of philanthropy after Warren Buffett pledged his multibillion-dollar fortune to the Bill and Melinda Gates Foundation, charitable giving was almost flat last year.

Individuals and institutions gave away an estimated \$295 billion last year, a 1 percent increase on an inflation-adjusted basis over the prior year. "Given the media and nonprofit sector buzz around what we're calling the megagifts made last year, it is maybe a little surprising that giving did not increase more dramatically," said Patrick M. Rooney, director of research at the Center on Philanthropy at Indiana University. "I think what we're seeing is philanthropy growing in a steadier, more linear way, when

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 CLASHES WITH GATES
 MISSION IN SUDAN**

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*Letters to the Editor are welcome
 and encouraged.*

Send to todendahl@nmag.org

everyone has been hoping for a pattern more like the roaring 1990s." The Giving USA Foundation, which produces an annual report on giving together with the center, attributed the lackluster growth in giving to the absence of major disasters. Donations to help disaster victims accounted for an estimated 3 percent of total contributions in 2005, skewing comparisons. One tax incentive intended to support charitable giving after Hurricane Katrina, for instance, produced an estimated \$11 billion in gifts. When donations for disaster relief are excluded from the calculations, giving rose 5.7 percent on an inflation-adjusted basis last year.

"When you take the large figure for disaster giving out, it changes the picture," said Richard T. Jolly, chairman of the Giving USA Foundation. Several large gifts helped pump up giving in 2006: the initial installment of Mr. Buffett's gift added \$1.9 billion to the total, or more than half a percent. Such gifts accounted for 1.3 percent of total giving, or about \$3.9 billion. "These megagifts are beginning to show up in a way they haven't before," Mr. Jolly said. Congress also temporarily allowed donors to transfer money from their individual retirement accounts to charities without incurring taxes, an incentive many wealthy individuals used. Some 59 percent of the more than 850 charities that responded to the Giving USA survey reported increases in charitable gifts, while nearly one-third reported declines. Giving to religious organizations, which rose 1.2 percent on an inflation-adjusted basis, accounted for 32.8 percent of total giving. Universities, private schools and other educational institutions, which have some of the largest and most sophisticated fund-raising operations, saw the biggest gains. Donors gave \$40.98 billion to educational charities in 2006, a 6.4 percent gain on an inflation-adjusted basis.

But perhaps the most surprising winners last year were arts organizations. Contributions to groups working in the arts, culture and the humanities rose 6.5 percent on an inflation-adjusted basis to \$12.51 billion, or 4.3 percent of the estimated total.

Not surprisingly, organizations devoted to international affairs, which includes those involved in disaster relief, were the biggest losers. They raised an estimated \$11.34 billion, a drop of 12 percent on an inflation-adjusted basis. They shared that distinction with human services organizations, which do more traditional charitable work like providing housing for the homeless and food for the hungry. Gifts to those charities also dropped 12 percent on an inflation-adjusted basis, to \$29.56 billion.

Since 2002, the percentage of overall giving to human services charities has been declining. The exception was 2005, when gifts increased, perhaps as a result of the overall increase driven by disaster giving.

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