LOOKING BACK TO BUILD OUR FUTURE

2017 ANNUAL REPORT
2017 was an exciting year for the Santa Fe Community Foundation, a year in which the Foundation’s Board of Directors and staff decided to pursue several new strategies. We made these choices based on one simple principle—do what’s best for the community at large.

When we examine the nonprofit world in our community, we are amazed by the sheer numbers, roughly 850 registered 501c3s in Santa Fe County alone. Upon further examination, we also noted how fortunate we are to live in such a “giving” community with so many volunteers and donors willing to help address the many issues we face. However, when we objectively look at the results achieved over many years of effort, we must question the productivity of the overall system, and thereby logically conclude we all need to work on improving that system.

Toward that end, one new strategy we decided to adopt is a “merger” fund. The Nonprofit Merger Fund will be set up to help defray the incremental expense of investigating/implementing mergers between nonprofits with similar interests. In this way we hope to incent a more open consideration of joining forces to make the system work better.

Another decision is to be more proactive in encouraging high-quality collaboration between funders as well as nonprofits. One important aspect of this strategy has been to reach out to our fundholders to make sure they understand our priorities and to seek their support of our efforts.

Yet another choice we’ve made is to do a better job of holding ourselves and our partners more accountable for hardline results. To help aid with this process we now emphasize results based accountability (RBA) in our own grantmaking and within the Foundation’s own practices. RBA is a discipline spreading rapidly across our community, and we’re encouraged by the data it produces.

Finally, after several conversations listening to community needs, the Board of Directors and staff decided to implement our new strategic framework to work more effectively and efficiently.

I hope the foregoing sample of new directions gives you the sense that we’re not just working within the system but also working on the system to deliver the results we all desire.

Sincerely,

Vernon (Bud) Hamilton
Chair
IN 2017, I spent my first full year as President and CEO of the Santa Fe Community Foundation. Together, with my Foundation colleagues and our generous Board of Directors, we undertook some deep reflection that had us looking back and learning from our past in order that we might build a stronger future. We also conducted nearly a dozen community conversations with diverse partners to ensure we were being a true “community” foundation—one that leads by listening humbly and then acting boldly.

And so, we ended 2017 with the Board of Directors adopting a new strategic framework that embraces “equity” as the soul of our work and more specifically, focuses the Foundation’s resources toward creating equitable access to opportunities for all people. This ethos is embedded into our newly conceptualized Areas of Impact that guide the content of our efforts. These include: Health & Wellbeing; Educational Success & Career Pathways; Sustainable Agriculture & Stewardship of Resources; Economic Security & Opportunities; and Cultural Vibrancy.

Within each of these areas, we have drilled down to set targets and priorities, measure impact, and ensure that we are investing in cross-cutting strategies that leverage every dollar and every hour of our work.

As a public foundation, in which thousands of our neighbors and partners have invested both time and money, we are confident that this path is the right one in working collaboratively to create a more vibrant, equitable, and just place we all call home.

At the same time as we were undertaking this important work, the Foundation’s core efforts continued unabated...and grew. For the second year in a row, over $7 million in grantmaking occurred from the Foundation, an additional $8 million were added to our assets, thousands of people received nonprofit capacity building assistance and trainings in our building, more than a dozen new Donor Advised Fundholders joined our efforts, and our partnerships both in the public and private sectors continued to propel the Foundation’s role in community leadership.

In the following pages, you’ll read much more about these exciting successes.

Finally, it has become clear to me in having the great opportunity to lead this Foundation, that our role is one of trusted stewardship. By that, I mean what we do now binds and honors our past efforts to the present and future. Our current actions and contributions also create a compact with the future to ensure something measurably better in the years ahead. I hope you will agree that what you will read in this 2017 Annual Report is a testament to that stewardship.

Sincerely,

William (Bill) A. Smith
President and CEO
2018 Board of Directors
Vernon (Bud) Hamilton, Chair
Lisa M. Enfield, Vice Chair
Richard Moore, Treasurer
Diane Martinez, Secretary

Beth Beloff
Jeff Bingaman
Carole Brito
William Finnoff
Emily Haozous
Deborah Holloway
Mary Anne Larsen

Manuel Monasterio
Beverly Morris
Suzanne Ortega Cisneros
Elizabeth Rice
Brian Vallo

Jennifer Kimball, Kenneth Romero, and Tricia Rosenberg rolled off the Board in 2017. We are deeply grateful for their dedicated Board service.

2018 Management Team
William (Bill) A. Smith, President & CEO
Sarah Sawtell, CPA, Vice President for Finance & Operations
Christa Coggins, MPH, Vice President for Community Philanthropy
Joohee Rand, Vice President for Community Investment & Strategy
Annmarie McLaughlin, Director of Community Programs
Charles Roundtree, Controller
Courtney Lopez, Director of Development

Alberto Granados, former Controller, transitioned to a new organization. We are deeply grateful for his dedication to SFCF.
A STORY ABOUT A SFCF GRANTEE

The Santa Fe Community Foundation serves four northern New Mexico counties, including Santa Fe, Rio Arriba, Mora, and San Miguel.

Truchas Services Center, Inc.

Rio Arriba

Nestled in the Sangre de Cristos lie small, charming, and somewhat isolated communities. Though these villages can be found in some of the most beautiful areas in New Mexico, they often are faced with many challenges such as lack of quality education, jobs, healthcare, food access, transportation, and more. Many of these communities also face involuntary economic disadvantages that lead to drug and alcohol abuse.

Truchas Services Center was established in 1973 to help address the many needs of Truchas and the surrounding communities. The Center offers a full-service library, a preschool—which every young child in Truchas attends, a summer program for primary school children, a variety of adult classes and activities, and a food distribution program.

The Center is the heart of the community, allowing individuals to access books, magazines, newspapers, videos and CDs, and provides notary and fax services. Classes offered are used widely by adults living in the area. For example, Becky—a Truchas native—does not drive, limiting her access to community activities, but has found an outlet through the classes offered in art and drawing, quilting, and weaving. Her interest in the Center and appreciation for their services has inspired her to volunteer at the local food distribution center.

The Truchas Services Center also puts on several community events such as the annual Truchas Fiestas, bringing the whole community together for music, food, dancing, and entertainment.

Just about everyone in the community passes through the Truchas Services Center at one point or another, providing a sense of community for all who live there.

Truchas Services Center is run by a handful of employees, but relies mostly on volunteers who understand the importance of the services offered at the Center and are motivated to keep it going. The Center relies on funding from organizations like the Santa Fe Community Foundation (SFCF) which has been a supporter for many years either through the annual competitive grant cycle or through individual donors who find the Truchas Services Center in the Giving Together catalogue. Funding from SFCF has supported programs, salaries, and has helped the Center carry out two new programs, the food distribution program and the weaving class.

“SFCF has been critical to our success over the years. We have received unsolicited funding from private donors who received our grant proposals through SFCF. The generous and continuing support of SFCF has helped us plan ahead and continue to grow our offerings for the community,” said Mary Singleton, Executive Director of Truchas Services Center.
Steve Dayton

Like many who discover Santa Fe and decide to settle here, Steve Dayton fell in love with the landscape, climate, culture, and the people. But one thing set him apart, his understanding that the nonprofit needs here in New Mexico were greater than most other places and his philanthropic spirit wanted to contribute.

Steve Dayton was born into a well-known entrepreneurial family in the Twin Cities (MN) where he was exposed to the nonprofit world at an early age. His desire to get involved began with volunteering with various organizations in his community and throughout his college years. It was during college that Steve began contributing personally to national organizations like The Nature Conservancy and the National Audubon Society. He later asked that they direct his contributions to New Mexico.

When he moved to Santa Fe in 1987, Steve was encouraged by a friend in his neighborhood to join the Armory for the Arts Board of Directors, a local nonprofit theater. This was Steve’s first introduction to New Mexico nonprofits and since then he has served on several Boards of Directors and volunteers his time to various organizations around town. He also rents out a building he bought near downtown Santa Fe at 516 Alto Street to a local nonprofit for an extremely low cost.

From 1998 to 2011, Santa Fe Community Foundation was Steve Dayton’s tenant at 516 Alto Street for just $1 per year. “I would joke with staff that if they didn’t abide by the few building rules, I would double the rent,” said Steve. It was during this time when Steve became familiar with community foundations more broadly.

While learning about community foundations and specifically the work of the Santa Fe Community Foundation, Steve discovered that he could open a fund at the Foundation with stock that had been passed down to him from his family’s legacy.

Over time, from 2004 to 2006, he made transfers quarterly from stock into a fund that he eventually named The Cabin Fund. As a fundholder, Steve had greater access to the knowledge and expertise of the Foundation staff and thereby expanded his ability to further contribute to the community’s needs. “I am not very disciplined in my giving nor am I very analytical, but I do like to keep a diverse portfolio and give broadly.” Steve’s giving focuses largely on nonprofits working to support environment, education, food security, the arts, social justice, and more.

Steve set his Fund up with three objectives:
1. To have giving come from the Fund’s invested earnings;
2. To have his daughters be successor advisors so that they could use their part of the legacy from the family business and do their own philanthropy; and
3. Once the term of advisement by his daughters expires, the endowment assets would continue to be used by the Foundation. Steve trusts that the Foundation will preserve its mission to build healthy and vital communities in the region and continue to expand its knowledge of how best to serve the community.

In addition to being a donor advised fundholder at the Santa Fe Community Foundation, Steve also has served on the Foundation’s Grants Committee.

When asked what he hopes to leave behind, Steve said he hopes to have led by example and that his daughters have already proven to have made philanthropic decisions of which he is proud. With a twinkle in his eye, Steve also mentioned his personal plans of donating his skeleton for a high school science classroom after he is gone.

“Anyone who contributes time, effort, or money is a philanthropist; we all do our part.”
—Steve Dayton

Click to learn more about Donor Advised Funds
Santa Fe Community Foundation holds 417 different funds. That’s over 400 individuals, families, nonprofits, and businesses investing in their communities.

The Foundation has nine program-specific initiatives housed at the Foundation.
(Click here to learn more).

The Santa Fe Community Foundation grew from $75M to over $83M in assets under management during 2017.

Santa Fe Community Foundation is home to 256 endowed funds benefitting specific local nonprofits. 3,352 people attended 184 programs in our building as part of the Foundation’s capacity building efforts.

Over 2,434 grants were made in 2017 and nearly $500K was specifically granted through our competitive grants process to our communities to create a brighter future.

Our fundholders granted out $601,750 to local nonprofits through our 2017 Giving Together catalogues.

The Foundation’s competitive grantmaking serves 4 northern New Mexico counties: Mora, Rio Arriba, San Miguel, and Santa Fe.

Nearly $7.5M was granted through the Foundation, many of these dollars have been granted through our Competitive Grants, Donor Advised grants, Agency Endowments, and Emergency Grants.
FINANCIALS

TOTAL GRANTS MADE IN 2017:
$7.44 MILLION

(in millions)

CONDENSED CONSOLIDATED STATEMENTS OF FINANCIAL POSITION
As of December 31, 2017*

ASSETS
Cash and cash equivalents $6,967,123
Promises to give 1,568,368
Program related investments 1,643,969

Investments
Charitable gift annuities 407,249
Endowment and other 70,885,040
Total investments 71,292,289

Property and equipment, net 2,218,748
Prepaid expenses 38,554
Other assets 37,809

Total assets $83,766,860

LIABILITIES AND NET ASSETS

LIABILITIES
Accrued expenses $165,558
Charitable gift annuities payable 155,582
Other liabilities –
Funds held for agencies 4,097,353

Total liabilities 4,416,493

NET ASSETS
Unrestricted 3,284,186
Temporarily restricted 42,047,452
Permanently restricted 34,018,729

Total net assets 79,350,367

Total liabilities and net assets $83,766,860

*The foregoing results for December 31, 2017 are derived from the audited totals for 2017. The complete set of 2017 audited financial statements is available at www.santafecf.org/financials. Independent Auditors: Moss Adams
"Thank you for a very impressive National Standard submission. Your policies are clear, complete, easy to read and understand. Your organization seems to take great pride in great work. It is a joy to review your work."

**National Standards for U.S. Community Foundations Employee**

"I know, you, just like us, believe in girls and want a world where many more girls grow up Strong, Smart, and Bold. These young women are our future. They will become future leaders and role models for their sisters, brothers, parents, family and friends and the next generation. Your positive contribution will shape our community and our larger society...

It has become clear to me and all of us that we cannot do this alone and it’s important to not only thank you all for joining us tonight and being part of her family but for us to also recognize an organization that has inspired New Mexico communities to be stronger, smarter, and bolder for 33 years.

Our honoree, our Strong, Smart, and Bold award winner, is the Santa Fe Community Foundation.

I was just thrilled when our committee selected the Santa Fe Community Foundation. Here is an organization so dedicated to the Santa Fe community—typically the one to honors others, and so deserving. Their devotion to building healthy and vital communities is so critical for all of us.

They focus their philanthropy on the critical issues facing our community and help nonprofits, like Girls Inc., become highly effective and achieve our full potential.

They make it more possible for all of us to tackle complex community problems.

As an organization, we have benefited greatly from your hard work.

My staff and I have attended numerous training, networking groups, and events put on by the team at Santa Fe Community Foundation, and I have seen the direct impact that has made on each of us. My staff, colleagues, and I have become better leaders, more responsive to community needs and all around more intentional at doing our jobs.

Community philanthropists are more engaged and give more strategically, making a bigger impact on our critical needs. Girls Inc. has received gifts throughout the years and those funds help us make a difference in the lives of girls.

So on behalf of the girls in Santa Fe, and all of us, I am happy to award you with this award.

Thank you for making all of us stronger, smarter and bolder."

*Excerpt from Kim Brown’s, President & CEO of Girls Inc., speech from the 2017 Strong, Smart, and Bold Award Ceremony.*

---

*The foregoing results for December 31, 2017 are derived from the audited totals for 2017. The complete set of 2017 audited financial statements is available at www.santafecf.org/financials.*

Independent Auditors: Moss Adams
Thank you to all 2017 SFCF Donors! The following list includes all who gifted to SFCF grantmaking, programs, and general support for our work in 2017. Support from these individuals, organizations, and peer foundations allow us to build on our future by creating stronger donor impact, improving nonprofit capacity and performance, and advancing SFCF’s programmatic work. It also enables us to expand and enhance our grantmaking and invest in strategic initiatives.
Ellen and Roger Miller
Elizabeth Boren Millhon
Cameron and Adam Miranda
Melissa Moore
Morgan Stanley
Mike and Beverly Morris
Peter Morse and Christopher Carter
Lora Morton
David Muck and Cole Martelli
Yuki Murata
Kelly Mytinger
Michael and Laurie Naranjo
Joan Lombardi and Lee J. Nash
Julia and Albert Nathanson
Hervey A. Juris and Leslie Nathanson Juris
Nebraska Chapter of NASW
New Mexico Association for the Education of Young Children
New Mexico Breastfeeding Task Force
New Mexico Community Foundation
New Mexico Kids Resource and Referral
New Mexico Primary Care Association
New Vistas
Tom Applequist and Charles Newman
Newman’s Own Foundation
Betsy Nichols
Judith Nix and Mary Ellen Degnan
Sarah Noss
Stanley and Nancy Noyes
Nusenda Foundation
Jane Clayton Oakes
Lisa O’Brien
Barb Odell
Robert Oldakowski and Luis Mendoza
Thomas and Evonne Olson
Paul Oostenbrug
Ricardo Ortega
Ruth and Henry Ortega
Carlos and Janet Ortiz
Nathaniel Owings
Jennifer M. Parks and Grove T. Burnett
Partners in Education Foundation for the Santa Fe Public Schools
James Alan Payne
Shari and Steve Pearce
Robert C. Peck
Patricia Pedersen
Alex Pennington
Maria Perez
Ashlyn and Dan Perry
Roger and Marie Peterson
Jaime Phillips
Jeffrey Pine and Thomas Morris
Gerald and Yara Pitchford
Planned Parenthood of the Rocky Mountains
PNM Resources Foundation
David G. Ponder
Ulrike Porat
Presbyterian Healthcare Services Center for Community Health
Presbyterian Medical Services Santa Fe Children’s Services
Lloyd Princeton
Jon Quinn
Letitia S. Quinn
Joohee Shin Rand and Lee Rand
Edward and Melanie Ranney
Nora Ranney
Reel Fathers
Ellen Bradbury-Reid and Edward Reid
Reside Home LLC
Lynne Rhys
Robert N. Rice
Gerald B. Richardson
Honorable Bill Richardson and Barbara Richardson
Anders Richter
Anne Ritchey
Ronald Ritchhart and Kevon Zehner
Mr. and Mrs. Frank Brooks Robinson
James and Elizabeth Roghair
Andres V. Romero
Anna Rondon
Rachel Rosen
Patricia Rosenberg
Philip Ross and Ric Varona
Michelle M. and Terry S. Rothwell
Charles Rountree and John Jones
Bernard and Ann Rubenstein
James and Kim Rubin
Patricia Ann Rudy-Baese
Juan Sanchez
Santa Fe Botanical Garden
Santa Fe County
Santa Fe Farmers Market Institute
Tony and Sarah Sawtell
Jenna and Wilson Scanlan
Alena Schaim
David and Janet Scheinbaum Scheinbaum & Russek, Ltd.
Ralph and Anne Scheuer
Martha L. Schlenk
Schneiders Family Foundation
Heidi Schulman
Martin C. Schultz
Suzanne D. Schumacher
Nan H. Schwanfelder
Mary Ann Shaening
E. C. Sheeley
Kimberly and Scott Sheffield
Benny Shendo, Jr.
Kerry Sherck
Betsy and Tom Shillinglaw
Judith M. Shotwell
Carolyn E. Silver
Robin Silverman, DC
Masie Silvestro
Janice Simmons
Mr. and Mrs. Brian S. Skeele
Jonathan and Karen Slater
Sleep Sweet
John E. and June S. Sloboda
Doug Smart and Bob Brown
Andrew and Evelyn Smick
Daniel M. Smith
William A. (Bill) Smith
Polina Smutko
Jim and Georgia Snead
Alan Snow and Kenneth Romero
Laureen Snyder
Mahlon R. Soloway
Robin Sommers
Sotheby’s International Realty
Southwest C.A.R.E. Center
Elizabeth K. Sperrich
Thomas and Hendrika Spier
Carolyn Spoldoro
Nadine F. Stafford
Alan and Doreen Stanton
Michael Stanton
Greg Stark
Steele Family Foundation
Linda Siegle and Elizabeth Stefanics
Stephen’s - A Consignment Gallery
Emily Stern
Robert E. Stevenson
Kim Straus
Porter Swentzell
The Abeles Foundation
The Wheless Foundation
Jeffrey Thomas
Thornburg Foundation
Russell L. Tims
Pauline and James Toevs
Paul Towle
Bruno Trambusti
Connie Tsosie-Gaussoin and Jerry Gaussoin
UBS Employee Giving Program
Kimball and Sharyn Udall
David and Lynda Underwood
United Way of Central New Mexico
United Way of El Paso County
OTHER FUNDS AT THE SFCF

The Santa Fe Community Foundation manages funds for special projects and community initiatives, agency endowments, and donor advisors.

Click here to see Funds of the Foundation.

Did you know nonprofits can hold a fund at the Santa Fe Community Foundation?

Click here to the Nonprofit Agency Endowment Fund List

Click here to see a list of special funds set up by the Santa Fe Community Foundation for broad community support, or by individuals for very specific purposes.

For information about starting a fund please contact Christa Coggins at 505.988.9715 or ccoggins@santafecf.org.
SFCF INITIATIVES

Foundation initiatives are funds that are run by a volunteer committee, supported by SFCF staff, and have their own independent grantmaking ability in order to address the pressing needs of our community. These initiatives allow us to further our reach and in 2017 each initiative contributed to positively impacting Santa Fe, our region, and indeed our entire state.
THE COMMUNITY LEADERSHIP FUND (CLF)

CLF allows the Foundation to improve community outcomes in four significant ways:
• Increasing Donor Impact
• Improving Nonprofit Capacity and Performance
• Expanding and Enhancing SFCF Grantmaking
• Investing in Strategic Initiatives

The Community Leadership Fund allows the Foundation to serve as a convener of people, ideas, and funds, and provide leadership in the nonprofit sector.

Noteworthy in 2017:
• $408k in CLF contributions were received.
• $602k in additional dollars were granted out to nonprofits in Santa Fe and northern New Mexico through fundholder contributions because of SFCF’s Giving Together catalogue, made possible by CLF.
• The Foundation reinvigorated its sponsor program with the support of CLF. This program enables important community partnerships to exist, ultimately enhancing quality of life in the region and allowing significant progress on difficult issues such as education, economic security, and affordable housing.

DOLLARS4SCHOOLS

Dollars4Schools is 100% committed to student success and classroom support. Our unique grassroots structure provides Santa Fe public school teachers with a local web-based “helping-hand.”

From funding teachers directly for classroom programs to providing students with school supplies, backpacks and warm winter coats, Dollars4Schools connects community and classrooms every day in Santa Fe.

Major accomplishments:
• In 2017, Dollars4Schools funded 104 classroom programs in 29 Santa Fe schools
• Nearly 700 classroom programs funded since 2013
• Enriching the education and lives of over 10,000 Santa Fe students

Great Things Happen When We Work Together!
Learn more here by visiting www.dollars4schools.org

ENVISION FUND

The Envision Fund at the Santa Fe Community Foundation, established in 1997, is New Mexico’s largest philanthropic entity dedicated to serving the state’s LGBTQ+ population. The Envision Fund promotes the health, safety, and empowerment of at-risk and underserved LGBTQ+ New Mexicans by advancing the knowledge and practice of LGBTQ+ focused donors and nonprofits, convening groups to create and execute shared agendas, especially through public gatherings designed to educate the population about issues facing the LGBTQ+ population. The Envision Fund accelerates LGBTQ+ focused philanthropy, grants funds to organizations that improve the lives of LGBTQ+ New Mexicans, and strengthens nonprofit partners to be successful in their LGBTQ+ focused missions.

2017 achievements:
• The Foundation announced a relaunch of the Envision Fund to go beyond the six northern New Mexico counties where the Foundation has traditionally funded to become the statewide LGBTQ+ philanthropic vehicle to support issues of importance to the LGBTQ+ community and its allies.
• The Foundation established three priorities for its LGBTQ+ focused grantmaking in New Mexico:
  – Combating discrimination against LGBTQ+ people in whatever form, whether it be in employment, housing, access to healthcare, etc.;
  – Supporting school-based anti-bullying efforts that create safe environments for LGBTQ+ people; and
  – Creating an HIV-free generation in New Mexico.
HEALTH EQUITY PARTNERSHIP

The New Mexico Health Equity Partnership (HEP), an initiative at the Santa Fe Community Foundation and a statewide network of 89 members in 15 counties, believes every New Mexican should have the opportunity to lead a healthy life, live in neighborhoods where our children and families thrive, and have a say in the decisions that impact their communities and their lives.

HEP accomplishes this by providing funding, training, coaching, and convenings to support communities of color and low-income communities to: 1) engage in community-led research projects; 2) create connections and linkages; and 3) strengthen organizational and advocacy capacity.

In 2017, over 250 parents and more than 200 children advocated for systems and policy change. Two case studies illustrating strengthened alliances, developed leadership skills, and policy outcomes include:

- **HEP supported young men of color in Albuquerque to conduct a research project examining the health impacts of free bus passes on young people.** They developed and administered surveys in English, Dari, Persian, Spanish, Swahili, and Turkish to more than 300 individuals, collected stories at community events, analyzed the data, and presented the findings. This not only led to increased leadership skills among the young men but to the piloting of free bus passes for young people in Albuquerque.

- **HEP supported Native American and Latino immigrant parents to conduct a research study regarding the impacts of wage theft of low-wage workers.** In 2017, six workers, representing Native American and Latino immigrant backgrounds, filed complaints about employment violations. The research findings and stories shared by the community members were instrumental in ensuring a victory for workers. In December 2017, Somos Un Pueblo Unido and other workers’ rights organizations announced an unprecedented agreement in a lawsuit against the New Mexico Department of Workforce Solutions for failing to enforce the anti-wage theft law. Now the agency must ensure that wage theft victims, especially those in rural communities, have access to a fair process for their complaints.

IMPACT INVESTING

Impact Investing enables Santa Fe Community Foundation to unlock and deploy a greater share of our philanthropic capital to advance our mission in an innovative way, beyond just grantmaking. The Foundation has committed up to 10% (currently about $4.5 million) of our pooled endowment assets to invest in promising local opportunities that promote our mission in the region while providing financial return. Since our first investment in Homewise in 2013, we have invested over $2.1 million in 13 local opportunities via Community Development Financial Institutions, nonprofit partners, and innovative social enterprises.

Notable achievements in 2017:

- Three new investments were made in 2017 including:
  - Two investments supporting economic development/revitalization in rural New Mexico communities including Native communities (Rural Community Assistance Corporation) and Las Vegas, New Mexico (Historical Hotels of Las Vegas, New Mexico LLC).
  - Investment in the Food Depot allowing the nonprofit to improve operational efficiency and serve more families with healthy food at a lower cost.
  - Debt-to-equity conversion of previous investment in MidSchoolMath enabled the company to receive $750,000 grant from the National Science Foundation to accelerate the development of its multi-media, comprehensive Grades 5–8 math curriculum that transforms how math is taught in the classroom with rich, immersive content and integrated technology.
MOGRO

MoGro, a project at the Santa Fe Community Foundation, is a nonprofit mobile grocery initiative working to support sustainable local food systems and eliminate barriers to affordable healthy food. MoGro works with community-based organizations and local farmers in the growing season to launch healthy food access sites in schools, medical clinics, and community centers to help all families access good, nutritious food. Food deliveries are made weekly to Community Champions, with shares including fresh produce, groceries, and meat and dairy items.

Accomplishments in 2017:

• The Food Club model is bringing increased impact, in the number and reach of communities served, as well as the quality and types of foods procured for low-income families, with 12 sites across New Mexico.
• MoGro sourced roughly 70 to 80% of its produce from local and regional farmers.
• MoGro received a grant to be a part of the Newman’s Own Foundation Nutrition Cohort, working in tribal communities.

NATIVE AMERICAN ADVISED ENDOWMENT FUND

The Native American Advised Endowment Fund (NAAEF), a fund at the Santa Fe Community Foundation, makes grants to Native American programs, tribes, and schools or to their partnering organizations based on review and selection of proposals by the Advisory Committee, all of whose members are Native American. The NAAEF’s area of service encompasses Santa Fe, Los Alamos, Mora, Rio Arriba, San Miguel, and Taos counties. The mission of the Native American Advised Endowment Fund is to enhance Native lifeways now and for future generations in northern New Mexico by promoting a spirit of sharing and by supporting community initiatives.

Grantmaking in 2017:

• $4,000 to New Mexico Kids Matter in support of recruitment and training of volunteers to become CASAs for Native American children who are in foster care.
• $3,700 to Museum of Indian Arts & Culture/Laboratory of Anthropology in support of lifeways of the Southern Athabaskans through display of artwork, baskets, beaded clothing, horse gear, as well as artist demonstrations, scholar forums, and films.
• $2,200 to Native American Student Services (SFPS) in support of summer program for Native American youth increasing academic proficiency while bringing traditional and cultural knowledge into an urban educational setting.

OPPORTUNITY SANTA FE: BIRTH TO CAREER

Opportunity Santa Fe: Birth to Career is a community-wide collective impact effort to improve the lives and key transitions of children and youth across Santa Fe, from birth until they enter their careers. Bringing together cross-sector partners with aspirational goals and collective actions, Opportunity Santa Fe is an ambitious response from across the community to the call to do better by our kids. Santa Fe Community Foundation supports the initiative as a backbone organization along with the City of Santa Fe Community Services Department.

Notable achievements in 2017:

• Supported 15 Collaborative Working Groups, each focused on a specific area of birth to career, including eight AmeriCorps VISTAs to support the work on the ground.
• Supported over 50 specific programs, events, interventions, and research projects as part of the Opportunity Santa Fe Collective Action Plan aimed at improving outcomes and wellbeing for children and youth from birth to career.
• Supported alignment of funding priorities focused on improving results for educational outcomes across Santa Fe County, City of Santa Fe, and Santa Fe Community Foundation with shared funding priorities for early childhood, reading, math, disconnected youth, and graduation rate.
SANTA FE BABY FUND

The Santa Fe Baby Fund, a fund at Santa Fe Community Foundation, seeks to raise awareness about the critical issues facing families with very young children in Santa Fe, New Mexico. Through grantmaking, policy advocacy, convening and public awareness, the Santa Fe Baby Fund “makes noise for babies.”

Accomplishments in 2017:

• $35,000 in grantmaking to Santa Fe-based organizations working on issues affecting children ages zero to five.
• May 2017 Fiesta Para Bebés—community health and wellness event with over 30 local providers of services.
• Early Childhood workforce development—supporting local and regional networks of early childhood teachers as they deepen their practice and improve learning for very young children.

NEXT GEN PHILANTHROPY

In 2017 we began exploring ways to engage the next generation of philanthropists who care as deeply about this place, our people, and the collective power we have to affect positive change. In doing this, we launched two giving opportunities for young philanthropists.

• Next Gen Donor Advised Fund features a lower starting minimum balance of $5,000, and allows fundholders to grow their fund balance over time, all the while working with our professional staff to inform and enhance their giving.
• Next Gen Giving Circle where participants contribute a minimum of $500 per year and will have the opportunity to participate in joint grantmaking with one another.
• And of course, we welcome direct financial support for the Foundation’s work—whether you support growing one of our endowments to strengthen grantmaking or embolden the vast amount of nonprofit capacity building we do—we welcome direct donor gifts.

Please contact Courtney Lopez (clopez@santafecf.org) if you’d like to learn more about these opportunities.
THE PHILANTHROPY HUB

The Santa Fe Community Foundation’s building at 501 Halona Street in Santa Fe has been designated as a learning and gathering place for the nonprofit and philanthropic sector. Nonprofit board and staff, donors, advisors, and the general community have attended hundreds of learning opportunities since we moved to Halona Street in 2011. These programs strive to:

• deepen philanthropic practice,
• build nonprofit capacity,
• provide support for professional advisors, and
• provide platforms for learning about social issues in our community.

Our community convening and nonprofit professional development work is shaped by the responses and input we receive from program participants. In listening carefully and deeply to our constituents’ needs, we strive to bring our partners opportunities to connect with one another, hone their skills, learn more about the social sector, and make their organizations more effective. Ultimately, this improves our communities, from clean water and sustainable agriculture, to job training, family support, thriving art programs, and social policies that have the long-term in mind.

2017 Board Pilot Program Participant Testimonial
“It keeps me up at night to have this kind of responsibility. It is a gift to have a program like this that brings the reality of the responsibility and a perspective that is very valuable. I hope to take back what I have learned to the organization and to other board members.”
— Kim Langbecker, Board Treasurer for Warehouse21

2017 Board Pilot Program Participant Testimonial
“Having a development background, I was impressed with the level of content, best practices, insights and advice of how to handle certain situations. The level of expertise was very strong.”
— Raffi Andonian, Board Chair, Adaptive Sports Program; Board Member for Silver Bullet Productions; Board Member for Santa Fe Council on International Relations, comments on the 2017 Board Pilot Program

2017 Executive Development Learning Circle Participant Testimonial
“I really value and appreciate this opportunity to learn and share in the Executive Development Learning Circle.”
— Linda Marianiello, NM Performing Arts Society

2017 Executive Development Learning Circle Participant Testimonial
“I have deep appreciation for the ED learning circle. I always feel more inspired and connected to a bigger vision when I leave.”
— Andrea Cassutt, SF Youth Symphony ED Learning Circle

2017 Emerging Social Sector Leader Program Participant Testimonial
“This program has been life-changing for me. I underwent transformations in so many forms! I transformed personally, professionally, and in all the roles that I am an integral part and I’m very grateful to have had the opportunity to be a part of it.”
— Anonymous

To learn more about the Santa Fe Community Foundation initiatives, click here.
**Open a Fund**

Opening a **Donor Advised fund** at the Santa Fe Community Foundation makes it possible for you to build your own philanthropic future by making grants locally and nationally, supporting issues you care about, and contributing to the overall wellbeing of northern New Mexicans.

When you choose to establish a **donor advised fund** at the Foundation, you maximize the impact of your giving; receive expert advice; reduce paperwork; and enjoy solid returns on your charitable investments. You also become part of a growing and engaged community of philanthropy.

Whatever your interests, establishing a Donor Advised fund with a gift of cash, securities, or other assets gives you an immediate tax benefit. It also allows you to make gifts over time, investing your charitable dollars and recognizing you and your family—without the administrative burden and expense of a private foundation.

The Santa Fe Community Foundation has a proven history of building and managing funds. We offer two basic kinds of donor advised funds (minimum balance for opening a fund is $25,000):

- **Donor advised gift fund.** These are invested in cash instruments or money market funds. There are no earnings on this type of fund.
- **Donor advised invested fund.** These are invested in one of the pools offered by the Foundation and earnings are added to your fund for grantmaking.

For more information about opening a fund at the Santa Fe Community Foundation, please contact Christa Coggins, Vice President for Community Philanthropy: ccoggins@santafecf.org, 505-988-9715 x 7002.

**Support The Santa Fe Community Foundation**

As we draw nearer to our 40th anniversary, we’re reflecting on what the growth of our Foundation has meant to Santa Fe and northern New Mexico, and most importantly, to the lives that have been transformed throughout the years. Contributions to our **Community Leadership Fund** are among the most critical resources that contribute to the work we do here at the Foundation each day—from supporting food security to safety net health services, to working on creating housing solutions and elevating our educational system, to the far-reaching technical assistance work we do with nonprofits that has made us the largest nonprofit capacity building provider in New Mexico. None of this would be possible without the generosity of our donors and community partners. For nearly four decades, **your** contributions to our **Community Leadership Fund** have enhanced the quality of life in our region. We kindly ask that you continue supporting our work in this capacity.

**Click here to make a contribution today.** For more information about the Community Leadership Fund, please contact Courtney Lopez, Director of Development: clopez@santafecf.org, 505-988-9715 x 7006.

**Planned Giving**

Have you considered the legacy you could leave—in support of your community and the causes you care about—through a planned gift? The steps are simple, the impact is immense.

Planned gifts help pave the path for a thriving future. Becoming a **Piñon Legacy Society** member means you’ve committed to giving a gift when you’re gone. Whether you want to support one of the Foundation’s existing grant-making areas, establish a scholarship fund, or create an endowment that supports a cause dear to your heart, the Foundation is equipped to ensure that your charitable wishes are honored now and in the future.

For more information about the Piñon Legacy Society, please contact Courtney Lopez, Director of Development: clopez@santafecf.org, 505-988-9715 x 7006.

---

**STAY CONNECTED**

**Subscribe to our weekly enewsletter**

**Like us on Facebook**

**Visit our website**

**CONTACT US**

505.988.9715
501 Halona St., Santa Fe, NM 87505
Mailing Address: PO Box 1827, Santa Fe, NM 87504-1827
www.santafecf.org

---

WAYS TO GIVE