

MEMBER SPOTLIGHTS

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STAY CONNECTED



WELCOME NEW and RENEWING MEMBERS

Kozmetsky Family
Foundation
(Dallas, TX)

Richard & Enika
Schulze Foundation
(Dallas, TX)

JOB OPENINGS

Have a job opening?
Please [let us know](#).



Avedis Foundation: Investing in Meaningful Relationships to Impact Social Health in Oklahoma

Philanthropy Southwest member Avedis Foundation (Shawnee, OK) is tackling the complicated issue of social health deterioration in its small community of Pottawatomie County, Oklahoma by investing in one simple idea: the power of relationships.

Avedis Foundation is a private foundation with assets of approximately \$100 million from the sale of a local hospital. Its mission is to improve the health, wellness and quality of life for the people of Pottawatomie County and its surrounding communities. With high rates of poverty, domestic violence, teen pregnancy and high school dropout, Avedis Foundation had many opportunities for investment. As they learned, sometimes a seemingly rudimentary concept can have enormous impact once put into motion.

Rewind a few years ago: Avedis Foundation CEO Michelle Briggs attended a meeting at her chamber of commerce where she heard about Community Renewal, an innovative program out of Shreveport, Louisiana that was improving social health, reducing crime and increasing social connections in local neighborhoods. The program was achieving its ambitious goals by focusing on bringing together partners and neighbors to restore the foundation of safe and caring communities. Immediately, she knew she wanted to bring the program to Pottawatomie County. [Read more.](#)

The Dark Side of Transparency: Private Decision-making can be more Effective than Openness

by **Bob Reid**, executive director of J.F Maddox Foundation (Hobbs, NM)

It is now almost impossible to read donor literature or attend charitable conferences without being bombarded by growing demands for greater openness, transparency, and self-revealing in giving. It's said that foundations won't realize their full potential, and may even fall into ineffective and self-serving ways, unless there is a transparency surge beyond existing disclosure requirements. However, in interviews I conducted for a dissertation at Oklahoma State University, "The Opacity of Private Philanthropy," both grantmakers and grantees reported several reasons why quiet, discreet foundation practices can lead to better giving. [Read more.](#)

2017 SPRING SUMMIT RECAPS

Philanthropy Southwest's Spring Summit in Little Rock, Arkansas provided continued learning and peer-to-peer networking opportunities. Read highlights from two seminars below.

Data as a Conversation Starter: *Using Data to Inform Grantmaking Strategy*

Philanthropy Southwest's "Using Data to Inform Grantmaking Strategy" seminar featured a discussion among a panel of experts in order to identify and assess strategies for using data to maximize impact in philanthropic giving. Moderated by Kathy Jankowski (Jankowski & Associates), the consultant

who conducted the research for Philanthropy Southwest's 3rd Giving Study, the panel included:

Adrian Cook, director of research and evaluations, **The Rees-Jones Foundation** (Dallas, TX)

Eusebio Diaz, vice president, **Baptist Health Foundation of San Antonio** (San Antonio, TX)

Sarah Kinser, chief program officer, **Arkansas Community Foundation** (Little Rock, AR)



"If you can give to anything, how do you choose what?" Sarah Kinser posed to the group of member participants. Data, she said, can be a powerful tool to help foundations navigate that very question. [Read more.](#)

Creating a Culture of Innovation



Philanthropy Southwest's Spring Summit Service Project focused on innovation in grantmaking with a two-part session at The Arkansas Regional Innovation Hub in Little Rock, Arkansas and a follow-up roundtable discussion at the Capital Hotel. Facilitated by Arkansas State Representative and Innovation Hub Executive Director **Warwick Sabin**, **Winthrop Rockefeller Foundation** (Little Rock, AR) Vice President **Regan Moffitt** and **The Carl B. & Florence E. King Foundation** (Dallas, TX) Program Director **Laura Duty**, member participants shared experiences and ideas about how foundations can think outside-the-box when it comes to

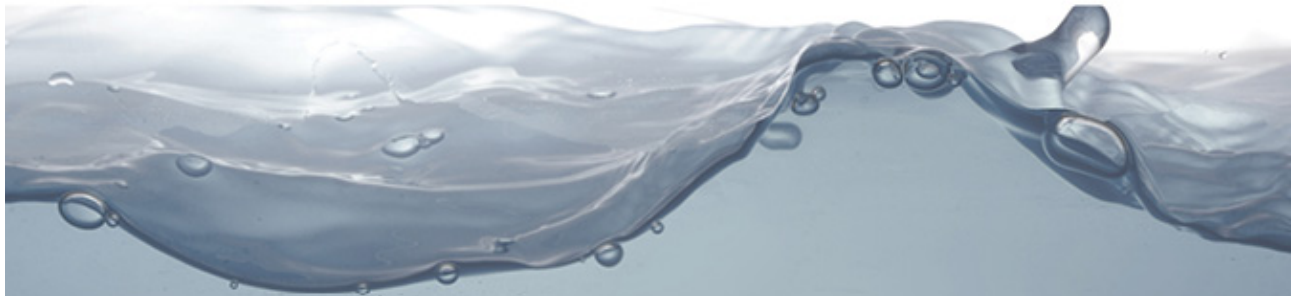
philanthropic giving and their own guidelines. As Rep. Sabin advised, "Innovation can be both in what you fund and how you fund it." [Read more.](#)

2017 ANNUAL CONFERENCE

REGISTER NOW!

OCTOBER 12TH - 14TH | 2017

LAKE TAHOE | INCLINE VILLAGE, NEVADA



CLARITY

OPPORTUNITIES IN CHANGING TIMES

69TH ANNUAL CONFERENCE

[Registration now open!](#)

Philanthropy Southwest's **69th Annual Conference from October 12-14** offers funders the opportunity to learn from and engage with experts - and one another - in serene **Lake Tahoe, Nevada**. Join foundation trustees and staff from Philanthropy Southwest's seven-state region to learn about strategies and opportunities in changing times. Participation by member and nonmember organizations alike is welcomed. View the [schedule of events](#) and [register today](#) to receive early bird reduced pricing.

LEGISLATIVE CORNER

INTRODUCING: LEGISLATIVE CORNER

Philanthropy Southwest is pleased to offer tools and resources to help members navigate important legislation affecting their funding sector, state and region. Learn about new advocacy education opportunities below.

Introducing **StateScape** - Legislative and Regulatory Tracking Tool - a new exclusive benefit that is free to Philanthropy Southwest members! StateScape allows individuals to track legislation introduced across the Southwest and to customize legislative updates based on individual preferences. Bills may be monitored at every stage to ensure advance notice of important proposals affecting a particular funding sector, state and/or region. To gain access to this legislative tracking tool for advocacy or compliance purposes, email [Lauren](#) and specify "StateScape" in the subject line. Philanthropy Southwest will offer several StateScape Webinars for new users throughout the year.

Supporting and Advancing Advocacy: Rules Public and Private Foundations Need to Know*

It is critical for foundations that want to engage in advocacy or fund organizations that advocate for policy change to know and understand all the rules and regulations that apply to the third sector. To view Philanthropy Southwest's recent complimentary webinar about current advocacy and lobbying guidelines for public and private foundations click [here](#).

**Thank you to The Bernard and Audre Rapoport Foundation, whose generous support helped make this webinar possible.*

SHORT TAKES

Member Happenings

Anschutz Family Foundation (Denver, CO) announced that Executive Director Debbie Jessup has resigned due to health concerns. Abel Wurmnest succeeds Jessup as the new executive director. Wurmnest has been a program officer at the Foundation since 2011 and will be only the fourth executive director in the Anschutz Family Foundation's 35-year history. [Read more.](#)

The Community Foundation of the Texas Hill Country (Kerrville, TX) has named Austin Dickson as its new executive director. Prior to leading the Foundation, Dickson was the executive director of Literacy Action in Atlanta, Georgia - one of the leading adult literacy nonprofits in the U.S., recognized for its innovative work by [Forbes Magazine](#) and [The Chronicle of Philanthropy](#). He previously worked for the Community Foundation for Greater Atlanta. A Waco, Texas native and TCU graduate, Austin has a long family history in Texas philanthropy; he is the grandson of the late Jerry Cartwright who was the former executive director of the Cooper Foundation and the Waco Foundation, as well as Philanthropy Southwest board president in 1980.

The Paso del Norte Health Foundation (El Paso, TX) announced the election of Sharon Butterworth, community advocate on mental health issues, as the new 2017-18 Board Chair. Hector Retta, vice chairman and CEO of Capital Bank, was appointed as vice-chair and chair-elect. The Foundation also elected three new members to the board of directors: Ernesto Avila with Capital Bank, Ed Escudero with High Desert Capital and Susan Melendez with Borderplex Alliance.

Foundation News

Flinn Foundation (Phoenix, AZ) announced its 32nd class of Flinn Scholars, comprised of 20 of Arizona's highest-achieving high school seniors. The competitive merit-based scholarship covers the cost of tuition and room and board at one of the state's three public universities, provides funding for at least two study-abroad experiences and an off-campus internship, among other benefits. [Read more.](#)

The Rees-Jones Foundation, The Dallas Foundation and Communities Foundation of Texas (Dallas, TX) partnered together to provide nearly \$13.5 million to fund an "aggressive spay/neuter initiative to drastically reduce the number of loose dogs across southern Dallas." The funding will provide approximately 46,000 free surgeries for dogs per year for the next three years. [Read more.](#)

El Pomar Foundation (Colorado Springs, CO) and its executives, William J. Hybl and Kyle H. Hybl, were honored with the 2017 Rebuilding Justice Award by The Institute for the Advancement of the American Legal System (IAALS). The Award is given to individuals and organizations that exemplify a spirit of innovation and leadership toward building a legal system that is accessible, fair, reliable, efficient and accountable. [Read more.](#)

Oklahoma City Community Foundation (Oklahoma City, OK) awarded \$386,000 in scholarships to 193 graduating seniors from 52 central Oklahoma high schools through the Community Foundation Scholars Program. The scholarships are a portion of more than \$1.6 million the OCCF will award to students across Oklahoma this year alone. [Read more.](#)

Dallas Women's Foundation (Dallas, TX) released its "Economic Issues for Women in Texas" report, which examines the economic status of women as well as the critical building blocks - education, health insurance, child care and housing - necessary for women to achieve economic security. The study looks at policies and practices at the state level, and identifies areas of opportunity where innovation and investment can help women and their families move from surviving to thriving. [Read more.](#)

Boettcher Foundation (Denver, CO) unveiled the establishment of a \$200,000 endowment fund named for Tim Schultz, the Foundation's President and Executive Director who is retiring in July after 22 years. Mr. Schultz was the board president of Philanthropy Southwest from 2014 - 2016. [Read more.](#)

For more member news continuously added to our website, [click here.](#)

Have news you want to share with our community of funders? We want to hear from you! Email [Lauren.](#)

UPCOMING EDUCATIONAL PROGRAMS

Don't forget to visit Philanthropy Southwest's [upcoming events listing.](#)

Thank you to the funders whose 2017 operating support makes our work possible!

The M. R. and Evelyn Hudson Foundation
The Roy F. & Joann Cole Mitte Foundation
San Angelo Health Foundation
Kirkpatrick Foundation, Inc.
Boettcher Foundation
Valley Baptist Legacy Foundation
Redman Foundation, Inc.
The Frees Foundation
Merced Foundation
W.T. & Louise J. Moran Foundation
Dodge Jones Foundation
El Pomar Foundation
M.B. & Edna Zale Foundation
Ardmore Institute of Health

About Us

Philanthropy Southwest actively promotes opportunities to exchange ideas, build relationships and advance philanthropic excellence. Founded in 1949, Philanthropy Southwest is the most enduring association of grantmakers in the United States, providing timely information and connecting colleagues across the region to help them thrive and succeed in their work. Philanthropy Southwest connects trustees and staff with foundations in Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma and Texas. We are dedicated to fostering a welcoming environment with members who generously help other members, working together toward a better future.

For more information, visit www.philanthropysouthwest.org