

2017

PSW QUARTERLY

QUARTER THREE

2017 ANNUAL CONFERENCE

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WELCOME NEW and RENEWING MEMBERS

The Walton Family Foundation
Bentonville, AR

JOB OPENINGS

Have a job opening?
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Philanthropy southwest
Connecting Grantmakers. Inspiring Excellence.

CLARITY
OPPORTUNITIES IN CHANGING TIMES
69TH ANNUAL CONFERENCE
SEE YOU IN TAHOE!
OCTOBER 12TH - 14TH | 2017

Join foundation staff and trustees who will gather in beautiful Lake Tahoe to learn from one another, hear experts in the field, and *make philanthropy stronger.*

Topics range from digital games and their impact on social change to environmental advocacy, immigration, disaster philanthropy and health equity - but the common denominator is their significance to Southwest funders. Check out the complete schedule [here](#).

Don't miss this opportunity for collaboration, honest conversations and fun!

[REGISTER TODAY.](#)

HURRICANE HARVEY RELIEF & RECOVERY EFFORTS



Many Philanthropy Southwest members have collaborated and generously contributed to relief and recovery efforts for the aftermath of **Hurricane Harvey** and its destruction to the Texas coastal region. A list of updates and needs from our members is available [here](#).

Please email [Lauren Haskins](#) if you have any additional updates you would like to include on the Philanthropy Southwest website.

2017 SUMMER PROGRAM RECAPS

Philanthropy Southwest provided diverse educational programs this summer, including: "Effective Compliance & Reporting for Private Foundations," "Managing Community Foundation Finances and Investments," as well as "Rural Philanthropy Days" (West Texas and Colorado) and "Philanthropy's Impact in the Southwest: Strengthening Local Communities to Achieve Global Goals." Read highlights from two programs below.

Philanthropy's Impact in the Southwest: Strengthening Local Communities to Achieve Global Goals

This summer, Philanthropy Southwest was pleased to partner with Council on Foundations and Albuquerque Community Foundation to present: "Philanthropy's Impact in the Southwest: Strengthening Local Communities to Achieve Global Goals."

The first panel of experts included leaders from United Nations Foundation, Foundation Center and Council on Foundations, who provided an overview of the sustainable

development goals (SDGs). The SDGs are a set of 17 goals created by the UN and adopted by 192 countries in an effort to end extreme poverty, which is defined as those living on less than \$1.50 a day. With 3 million children in extreme poverty in the U.S., this is a problem for developed countries, as well as developing countries. In the Southwest, where the Human Development Index is well below the national average for all states except Colorado, there are significant challenges to tackle. While philanthropy is ahead of the game in terms of measuring outcomes and outputs, funders must continue to use data and collaboration to better understand which strategies are working and which are not. What do we want our American and Southwest cities to look like? [Read more.](#)



Southwest funders see how their grantmaking aligns with the SDGs

Rural Philanthropy Days



Sustainable construction methodology lime plaster construction

Rural communities face different challenges than their urban counterparts, ranging from access to healthy foods, lack of adequate housing, lack of public transportation and jobs. The list is extensive, and each of these challenges requires unique solutions given significantly smaller populations and limited resources. What some may not realize is that only 10% of current philanthropic giving goes to rural communities, so nonprofits that serve in these areas face a debilitating challenge to find funders who will look at small and under populated areas. Funders, on

the other hand, seek to connect with rural constituents, and with each other, to explore new opportunities and learn about the region from those who are closest to it.

In response to this growing need, Philanthropy Southwest offers several educational programs throughout the year that convene rural funders. One such event, "Rural Philanthropy Days," took place this summer in both West Texas and Colorado. This conference brought together rural nonprofits and funders wanting to invest in rural areas. The Montalvo House, which participated in West Texas Rural Philanthropy Days, serves as an example of the many rural nonprofits who attended. They are diligently responding to the needs of their community while staying true to their rural ideals.

The Montalvo House is a 501(c)(3) located in Brackettville, Kinney County, Texas - a rural county of 3,600 residents with a 21% poverty rate and an average per capita income of \$17,000. [Read more.](#)

Do you have an idea for an educational program or want to learn more about a particular topic? Email your ideas and thoughts to [Lauren Haskins.](#)

LEGISLATIVE CORNER

Philanthropy Southwest is pleased to offer tools and resources to help members navigate important local and national legislation affecting philanthropy. Thank you to The Bernard and Audre Rapoport Foundation, whose generous support helps make these resources possible.

2017 Legislative Update*

Several bills are currently pending in Congress that, if passed, could potentially affect Philanthropy Southwest members. These include:

1. **Charities Helping Americans Regularly Throughout the Year (CHARITY) Act of 2017**

If passed in its current form, the [CHARITY Act](#) would amend the Internal Revenue Code to decrease the tax rate for the excise tax on private foundation investment income, and it would change the rules for donor advised funds, making them eligible for contributions from individual retirement accounts. The bill was introduced in the United States Senate on June 13, 2017 and referred to the Senate Finance Committee. An identical version of the bill (H.R. 2916) was introduced in the House on June 15 and referred to House Ways and Means.

***What You Can Do:** According to the Council on Foundations, private foundations may engage in direct lobbying on this issue, as it qualifies under the self-defense exception. Community Foundations are also free to lobby for the passage or defeat of this bill.*

2. **FY 2018 House Government Appropriations Bill**

Passed by the House Appropriations Committee in July, [the bill](#) cuts funding to the IRS by \$149 million. In doing so, it prohibits the IRS from using its funds to determine that a church is not exempt from taxation because it participates in or intervenes in a campaign for a candidate for public office, unless very limited exceptions are met. Notably, the bill (in its original form) does not amend the funding for determining that a private foundation or public charity / community foundation has engaged in partisan electoral activity; however, amendments to the bill could alter the scope of the legislation moving forward.

A similar bill was introduced in the House on January 3, 2017. [H.R. 172](#) would repeal the Johnson Amendment entirely, restoring the ability of churches and other organizations exempt under Section 501(c)(3) of the Internal Revenue Code to support or oppose candidates. Read United Philanthropy Forum's statement regarding the Johnson Amendment [here](#).

***What You Can Do:** According to the Council on Foundations, private foundations may engage in direct lobbying on H.R. 172, as it would allow private foundations to engage in previously*

prohibited political activity and thus qualifies under the self-defense exception. Community Foundations are also free to lobby for the passage or defeat of the bill.

Note: Private Foundations should seek out legal counsel prior to advocating for the passage or defeat of any legislation that only impacts churches and not the powers of private foundations themselves, as it is unlikely that such legislation would qualify for the self-defense lobbying exception.

****Given the complexity of the legislative process, private foundations should consult with their attorney for any additional questions and to clarify which bills or proposed amendments on which they may lawfully comment. A refresher on the rules related to private and community foundation advocacy can be found on the [Philanthropy Southwest website](#) and via [Bolder Advocacy's Philanthropy Advocacy Playbook](#).***

StateScape

StateScape Legislative and Regulatory Tracking Tool - an exclusive benefit that is free to Philanthropy Southwest members - 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 Haskins](#). Philanthropy Southwest will offer several StateScape Webinars for new users throughout the year.

SHORT TAKES

Member Happenings

Flinn Foundation's board of directors has chosen one of Arizona's most broadly accomplished executives and community leaders as its new president and chief executive officer. Tammy McLeod, currently the vice president for energy resource management at Arizona Public Service, will succeed retiring President and CEO Jack B. Jewett. McLeod will begin her new position in October. [Read more.](#)

The Houston Endowment announced that Mandy Chapman Semple joined the endowment earlier this month as director of learning and evaluation.

Southern Oklahoma Memorial Foundation has a new president: Mary Kate Wilson. Ms. Wilson was previously employed by **Samuel Roberts Noble Foundation**, since 1997.

San Angelo Area Foundation Board Chairman Mike Boyd has been appointed San Angelo Chamber of Commerce interim president.

Tocker Foundation has promoted Karin Gerstenhaber to associate director. Ms. Gerstenhaber has been with the Foundation since 2011.

Paul Harris will retire as President and CEO of **Hoblitzelle Foundation** at the end of 2017. Katie Harris Robbins has been named as his replacement.

Northern Trust announced the expansion of its Foundation & Institutional Advisors Practice, including the addition of Ryan McCauley, regional director in the Houston, Texas market, where he consults with boards and professional staff to implement consulting, asset management, custody, and planned giving services that align with their mission and values.

Foundation News

Hogg Foundation for Mental Health announced \$1.9 million in grants in its commitment to child and adolescent mental health, its growing investment in early intervention and prevention, and its support of humane, evidence-based alternatives to punitive disciplinary practices. [Read more.](#)

The **Boettcher Foundation's** new book *All the Wisdom and None of the Junk: Secrets of Applying for College Admission and Scholarships* launched September 5 and is available at Amazon.com. Written by Katy Craig and Katie Kramer, *All the Wisdom and None of the Junk* advances the Boettcher Foundation's goal of helping the next generation of talented citizens apply for college and scholarships by demystifying the college and scholarship selection process. More information is available [here](#).

Telluride Foundation is working to help rural Colorado towns such as Nucla and Naturita improve their local economies. Read more about how the loss of coal jobs is affecting Western Colorado and how foundations are responding [here](#).

St. David's Foundation unveiled the list of recipients of its summer 2017 grants awards, totaling \$33 million in support of area healthcare nonprofits. \$12 million in grants will go to the area's safety net clinics, where low income Central Texans receive quality healthcare for themselves and their families. Additional grants will go to support mental health resources in the community, along with dental care and resources for children's health. [Read more.](#)

Many Philanthropy Southwest members were featured in *Inside Philanthropy's* list of the 50 Most Powerful Women in U.S. Philanthropy. View the complete list [here](#).

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

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

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
Merced Foundation
Pikes Peak Community Foundation
The Enrico & Sandra di Portanova Charitable Foundation
Ed and Mary Heath Foundation

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