Strategic Grantmaking: Collaborate, Commit, Succeed

New Mexico Association of Grantmakers

November 7-9, 2007
Albuquerque, New Mexico

Santa Fe, New Mexico 87504
PO Box 9280
New Mexico Association of Grantmakers
The New Mexico Association of Grantmakers presents

STRATEGIC GRANTMAKING:
COLLABORATE, COMMIT, SUCCEED

Funders, nonprofit representatives and policy makers live with constantly evolving changes and challenges in how to set priorities. Participants will come away from the conference with specific, concrete ideas and next steps to increase their impact in New Mexico. This year’s focus is on collaboration and how to leverage information, money and power.

2007 Conference Committee

Susan Cantor, New Mexico Association of Grantmakers
Pamela Chavez, Don Chalmers Ford
Catherine Conran, PNM Resources Foundation
Tripp Killin, Killin Endowment Fund
Marilyn Mason, Mason and Associates
Teresa Odendahl, New Mexico Association of Grantmakers
Lisa Oppenheimer, Oppenheimer Brothers Foundation
Dolores Roybal, Con Alma Health Foundation

New Mexico Association of Grantmakers ♦ Board of Directors

Ben Maddox, J. F Maddox Foundation, Chair
Billie Blair, Santa Fe Community Foundation, Vice Chair
Rick Abeles, Abeles Foundation, Treasurer
Ann Hattis, Bank of America, Secretary
Sandy Brickner, Sanford & Jane Brickner Advised Fund
Catherine Conran, PNM Resources Foundation
Elizabeth Crittenden-Palacios, Taos Community Foundation
Gay Dillingham, Livingry Foundation
Lynn Hathaway, Santa Fe Children & Youth Commission
Philip Howell, Frost Foundation
Blair Naylor, Cudd Foundation
Lisa Oppenheimer, Oppenheimer Brothers Foundation

The Fifth Conference
November 7-9, 2007 ♦ Albuquerque, New Mexico
Embassy Suites Hotel

The conference has been planned so participants will benefit from attending the entire program. Registration is open to funders, policy makers and nonprofits that are currently participating in ongoing collaboratives in New Mexico.

Generously underwritten by
Con Alma Health Foundation
The Daniels Fund
McCune Charitable Foundation
J. F Maddox Foundation
Messengers of Healing Winds Foundation
Nirvana Manana Institute
PNM Resources Foundation
The Thaw Charitable Trust
United Way of Santa Fe County
Wednesday, November 7, 2007

4:00 PM
Community Foundation Coalition of New Mexico
Slate Street Café
515 Slate Ave NW, Albuquerque, NM
Community Foundations Only

5:30-8:00 PM
Registration and Opening Reception
Embassy Suites, La Ventana Room
Interactive Performance by Theater Grottesco
A behind-the-scenes look at a participatory collaborative process, adapted to enrich the experience of being involved in philanthropy.

"miraculous...wonderfully energetic...unique...extraordinary...shot through with fierce energies...the essential magic of live theater..."
—Peter Breslin

Thursday, November 8, 2007
All plenary sessions located in La Ventana Room.
Rooms for breakout sessions TBA

7:00-8:00 AM
Full breakfast included for hotel guests

8:00 AM
Opening Plenary Session
Welcome by Ben Maddox, Board Chair, New Mexico Association of Grantmakers and Trustee, J. F. Maddox Foundation

Highlights of Giving Survey 2007, Terry Odendahl, President

8:15-10:00 AM
A Better New Mexico
Strategies for Effective Change:
Perspectives from Inside and Outside the State
Eric Griego, Executive Director, NM Voices for Children

Mr. Griego currently serves as Executive Director of NM Voices for Children (NMVC), a nonprofit, non-partisan research, policy and advocacy organization focusing on child poverty and working families. Eric has also served as Assistant Cabinet Secretary for Economic Development in Governor Bill Richardson's administration, Albuquerque City Councilman, President of the State League of Cities, and Chairman of the State Economic Development Commission. Eric also worked in Washington D.C. as an economist, policy analyst and communications director for several federal agencies and the U.S. Congress. He was born and raised in Albuquerque's historic Barelas neighborhood, where he now lives with his daughter Melissa.

Michele Prichard, Liberty Hill Foundation

Ms. Prichard, currently Director of Change Initiatives at the Liberty Hill Foundation in Los Angeles, was Executive Director of the Foundation from 1989 to 1997. She helped create new grant programs addressing poverty, race relations, and environmental health. Liberty Hill now awards over $3 million annually, and is one of the most innovative public foundations in the country, sponsoring various efforts to convene nonprofits and foundations around common issues. Currently, Michele is serving as a lead facilitator in GREEN LA, a collaborative effort involving nearly 70 environmental and environmental justice organizations to inform and support the City of Los Angeles in advancing ambitious policies for a sustainable future.

10:00-10:15 AM • Break

10:15-11:30 AM
Second Plenary Session

Engaging the Issues
Conference Committee Facilitating

This interactive session will integrate the basics of collaboration: building Community, identifying key issues, and establishing priorities. In facilitated discussion groups we will engage in a two part process that starts with identifying the issues. Come prepared with your priorities for grantmaking in New Mexico, your passions, your prejudices!

11:30-12:15 PM • Box Lunch
12:15-1:30 PM
Third Plenary Session: Panel Discussion

Funders' Collaboratives in New Mexico: The Good, the Bad & the Ugly
Diana Campomar, Hispanics in Philanthropy National/State Model
Gay Dillingham: NM Climate Change Funders
Nancy Pope: 2010 Plan to End Hunger in New Mexico
Brian Shields: Rio Grande Alliance and Valle Vidal Coalition Comparison
Lisa Oppenheimer, Oppenheimer Brothers Foundation, Moderator

1:30-2:00 PM • Break

2:00-3:30 PM
Fourth Session

Break Out Session I:
Creating and Sustaining Public/Private Partnerships
Thomas Aageson, Museum of New Mexico Foundation

Thomas Aageson, a leading expert in the state and Executive Director of the Museum of New Mexico Foundation, a nonprofit organization that provides private support to the Museum of New Mexico’s four museums and six state monuments, will facilitate this workshop. Tom has been part of public/private initiatives at the local, state and international levels.

Break Out Session II:
Mission-Related Investing
Michael Kramer, Director of Social Research and Managing Partner of Natural Investment Services LLC

See how endowments make money and make a difference through targeted investments and shareholder advocacy. Mission-related investing. Look at examples of foundation investment social policies. See how the sophistication of the industry today makes it possible to have a fully diversified portfolio of social investments which deliver returns similar to conventional strategies.

Break Out Session III:
Workshop on Funding Advocacy
Abby Levine, Alliance for Justice

This interactive workshop will provide both public and private foundations with an overview of advocacy and the various roles they can play. Specifically, we will discuss why it is important for foundations to support advocacy, the difference between advocacy and lobbying, and how foundations can support grantees that lobby.

3:00-3:30 PM • Break

3:30-5:30 PM
Fifth Plenary Session

Engaging the Issues: Which Model Will Work?
This is a continuation of the morning’s facilitated session. Building upon the luncheon panel on collaboratives, we ask everyone to participate in a process of naming New Mexico’s priorities for grantmaking in the upcoming year.

5:30-7:00 PM
Cocktail Reception—Hotel Atrium

7:00-9:00 PM
Networking Dinner—La Ventana Room

Friday, November 9
7:00-8:00 AM
Full breakfast provided for hotel guests

8:00-9:00 AM
NMAG Annual Meeting and Priority Setting for 2008

Membership urged to attend. Continental Breakfast provided for participants.
Conference No Solicitation Policy

This conference is not intended to be an opportunity for solicitation of any kind, including solicitation for business, fund management, or grants.

Hotel Rates and Reservations

We urge you to stay at the hotel and make reservations early. Our conference block will fill up quickly. The special conference rate is $110/night; the regular hotel room fee is $189/night.

Hotel Information

New Mexico Association of Grantmakers’ Fifth Annual Conference will take place at the Embassy Suites Hotel in Albuquerque. The hotel is located at 1000 Woodward Place NE, just off Interstate 25, three miles from the Albuquerque International Airport and minutes away from Historic Old Town, Nob Hill, and Downtown. (Driving directions below).

The Embassy Suites Hotel offers a complimentary, full cooked-to-order breakfast for hotel guests as well as a nightly Manager's Reception featuring beverages and hors d'oeuvres. Recreational facilities include an indoor heated pool, whirlpool, game room and 24-hour fitness center. Spa Botanica, a full-service day spa, features massage, facials and other treatments. The hotel also offers a 24-hour business center.

Each individual guest must make their own reservations by phone at 1.800.EMBASSY. Please identify yourselves as members of the New Mexico Association of Grantmakers Annual Conference and use the special promotion code AGM. All reservations must be accompanied by a first night room deposit or guaranteed with a major credit card.

| Conference Rate Cut-off Date: October 15, 2007 |
| Phone: 505.245.7100 or 1.800.EMBASSY (for reservations) |
| Online: www.nmag.org and click on Conference |
| Check-in Time: 3:00 PM ❖ Check-out Time: 12:00 PM |

Conference Facility

The primary conference meeting location for plenary sessions is the La Ventana Room at The Embassy Suites Hotel. Additional locations for breakout sessions TBA. The opening reception and performance on Wednesday, November 7 and plenary dinner on Thursday, November 8 will be in the La Ventana Room at the Embassy Suites Hotel.

Getting There

Car—Directions from the Albuquerque Airport and south:
Take I-25 north toward Santa Fe. Take Lomas, Exit 225. Turn left off Lomas to Woodward Place. Hotel is located on right-hand side.

Directions from Santa Fe and north:
Take I-25 south approximately 60 miles to Albuquerque. Take Exit 225 toward Lomas Boulevard. Turn right on Lomas and right again on Woodward Place. Hotel is located on right-hand side.

Plane—Most major airlines serve Albuquerque. The hotel is conveniently located three miles from the Albuquerque International Airport.
Things to do in and around Albuquerque

Museums and Other Attractions

New Mexico Museum of Natural History & Science, 1801 Mountain Road NW, 505.841.2800

Indian Pueblo Cultural Center, 2401 12th Street NW, 505.8443.7270

The Albuquerque Museum of Art & History, 2000 Mountain Road NW, 505.243.7255

Albuquerque Aquarium & Rio Grande Botanic Garden, 2601 Central Avenue NW, 505.764.6200

Entertainment

Albuquerque Little Theatre, 224 San Pasquale SW, 505.242.4750

New Mexico Symphony Orchestra, 4407 Menaul Blvd NE, 505.881.8999

Kimo Theatre, 423 Central Ave NW, 505.768.3322

Cancellation Policy

Refunds: less a $50.00 processing fee per person, will be granted on written requests received by NMAG on or before 5:00 pm, Wednesday, October 24, 2007. No refunds will be given after this date.

Special Needs

In compliance with the ADA, NMAG and the hotel will make all reasonable efforts to accommodate persons with disabilities at this meeting. Please indicate on your registration form if you need assistance or if you have dietary restrictions.

Attire

Business casual

Mail check to: New Mexico Association of Grantmakers, PO Box 9280, Santa Fe, NM 87504-9280