

PHILANTHROPY SPOTLIGHT: HEALTH CONVERSION FOUNDATIONS

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Getting More Strategic: A Big Texas Funder's New Game Plan for Health Equity

by **Alyssa Ochs**, *Inside Philanthropy*

The growing reach and rising sophistication of local health foundations is one of the most important stories in institutional philanthropy right now. These foundations, many of which were set up by nonprofit health organizations converting to for-profit status, often have substantial resources and are moving ever more grant money.

Earlier this year, we reported on research by the Bridgespan Group revealing that health conversion foundations are now pumping out over \$1.3 billion in grants annually in their local areas, largely to help low-income Americans gain access to care. Some of these foundations have endowments the size of the national grantmakers, yet far narrower geographic mandates. For example, the **Colorado Health Foundation** has assets of \$2.4 billion, and has given out as much as \$97 million in some recent years - big money in a state with 5.5 million people.

But it's not just their size and relative newness that makes these health foundations such an important story to follow. It's also their increasing sophistication in how these grantmakers are thinking about health and health equity. Following the lead of better-known national funders like Robert Wood Johnson and Kresge, local health funders are focusing more on the social determinants of health - looking upstream at how to create a healthier population overall. They are also looking for ways to reform health systems to deliver better outcomes at a lower cost and focus more on prevention.

The **Episcopal Health Foundation** (EHF) in Houston is a great example of these emerging trends in local health grantmaking. With a focus on 57 Texas counties and over \$1.2 billion in assets, this funder - which was only just created in 2013 - has lots of resources and big plans. [Read more.](#)

HURRICANE HARVEY FUNDERS' DATABASE



Hurricane Harvey devastated communities large and small throughout the Gulf Coast and Central Texas. In response to many members at the Annual Conference requesting to better understand current funding efforts and needs throughout the region, Philanthropy Southwest is creating a funders' database to provide access to on-going relief and recovery grantmaking data. The goal is to help funders learn about efforts currently underway and potential opportunities for future investment.

To reach this goal, Philanthropy Southwest is asking member and nonmember funders to share their grantmaking data regarding Hurricane Harvey. Once Philanthropy Southwest has reviewed submissions, a database will be available on the Philanthropy Southwest website, **which only funders may access**. Philanthropy Southwest will send out an email communication when this database has been published. It will be updated regularly.

[Submit your Hurricane Harvey Grantmaking Data Here.](#)

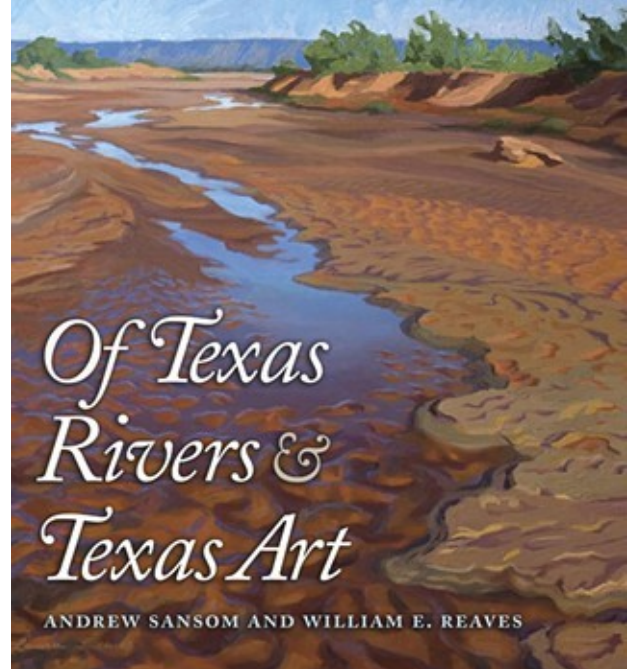
Thank you in advance for your participation - transparency and collaboration will undoubtedly strengthen the philanthropic response to this disaster that has wreaked havoc on so many of our communities.

2017 FALL PROGRAM RECAPS

Philanthropy Southwest provided diverse educational programs this fall, including: *69th Annual Conference in Lake Tahoe, Texas Environmental Grantmakers Group 2nd Meeting, Rural Funders of the Southwest 2nd Gathering, Deciphering the Form 990, Funder Briefing - Youth POWER in the Southwest (NEW!), and Grantee Inclusion Workshop (NEW!)*. Read highlights from three programs below.

Texas Environmental Grantmakers Group

Philanthropy Southwest serves as a coordinator for Texas Environmental Grantmakers Group (TEGG), which hosted its fall meeting in October at The Witte Museum in San Antonio. The theme of the meeting, "Of Texas Rivers & Texas Art," is also the focus of the recently published book of the same title as well as a current exhibit at the Witte. The work of 22 artists is included in the exhibit, 15 of which participated in the book project. Presenters included Andrew Sansom, executive director of the Meadows Center for Water and the Environment at Texas State University-San Marcos and director with the **Jacob and Terese Hershey Foundation**; artists Margie Crisp and William Montgomery and influential Texas art collector and researcher William Reaves.



Over lunch, the group discussed Hurricane Harvey disaster relief efforts. Jeffrey Hershey, president of the Jacob and Terese Hershey Foundation, shared information about their work with Austin Pets Alive and Houston Pets Alive to help the more than 1,300 surrendered or abandoned pets find new homes.

Lunch was followed with a business meeting and tour of the exhibit. Minutes of the meeting will be available on the TEGG landing page of the PSW website. The next meeting is scheduled for Friday, April 27, 2018 at the Texas A&M University Corpus Christi Harte Research Institute for Gulf of Mexico Studies. Interested in joining TEGG or learning more? Contact [Adrienne Clay](#).

Funder Briefing - Youth POWER in the Southwest



Philanthropy Southwest was pleased to partner with and participate in the 2nd annual regional briefing in Albuquerque, New Mexico November 15 - 17 hosted by the Funders' Collaborative on Youth Organizing (FCYC). The conference focused on how youth organizing supports the holistic development of young people. Made possible through the investment and leadership of PSW Member **W.K. Kellogg Foundation**, the convening included 40 national, regional, and local funders, as well as 375 participants from 140 youth and intergenerational organizations across 30 states.

Youth organizations were selected to participate based on their actively organizing and developing the leadership of primarily low-income or people of color age 13 - 25 to address root causes of systemic inequity through collective action. Selected organizations were engaged in networks and coalitions, as well as partnerships throughout their communities, to advance their goals for a more

just society, and to end all forms of oppression, including those based on race, ethnicity, class, ability, sexuality, and gender.

Site visits during the convening were organized around three themes: building a deeper understanding regarding the history of youth and intergenerational organizing in the Southwest that intersects with culture and identity; taking an in-depth look at immigration organizing efforts in the Southwest; and learning about empowerment and organizing efforts with indigenous youth.

The conference of youth leaders from across the country was the largest cross-issue youth organizing convening in the nation.

Grantee Inclusion Workshop

From December 5 - 7 in Phoenix, Arizona, Philanthropy Southwest collaborated with Grantmakers for Effective Organizations (GEO) and Arizona Grantmakers Forum to offer a two-day Grantee Inclusion Workshop to foundation trustees and staff.

Workshop objectives included equipping participants with the tools needed to deepen their engagement with grantees and the community, providing an opportunity to learn and use new and different tools, resources and frameworks to foster greater grantee inclusion within their organizations, and offering inspiration to participants to lead their organizations in deepening grantee inclusion. Emphasis was placed on examining the gaps between mission and behavior, aspiration and current reality, and values and practice. Workshop facilitators included Heather Peeler and Emily Wexler of GEO and Eric Martin, founder of Adaptive Change Advisors.



Participants left the workshop with strategies and solutions to facilitate honest conversation and authentic partnership with current and prospective grantees.

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](#). For a complete list of Philanthropy Southwest upcoming events visit our [website](#).

PUBLIC POLICY CORNER

Philanthropy Southwest is pleased to provide tools and resources to help members navigate important local and national legislation affecting philanthropy. Below is Philanthropy Southwest's factsheet on the Rules of Advocacy for Public and Private Foundations, created in partnership with Alliance for Justice. Thank you to The Bernard and Audre Rapoport Foundation, whose generous support helps make these resources possible.

Did you know that private and public foundations may participate in many forms of advocacy

activities and may also fund advocacy? Although private foundations incur a prohibitive tax on lobbying expenditures, they may participate in many forms of non-lobbying advocacy that can also be engaged in by public foundations.

Both private and public foundations can:

- Influence the adoption of agency regulations that interpret existing laws
- Build relationships with legislators or help grantees build and sustain these relationships
- Convene nonprofits and decision-makers to discuss a broad topic
- Educate legislators about a broad range of issues, without referencing specific legislation
- Meet with legislators to discuss the scope and impact of the foundation's work
- Sign on to an amicus brief, file a lawsuit or challenge a law or enforce a law, or fund litigation to challenge the constitutionality of a particular law
- Train grantees on advocacy rules and how to lobby
- Influence school board policies or the policies of any other "special purpose body" that has limited, non-legislative, jurisdiction and authority (e.g. housing authorities, sewer and water districts, and zoning boards)
- Conduct public education campaigns that do not include calls to action or mention specific legislation
- Offer technical assistance in response to a written request for testimony from a legislative body
- Produce a comprehensive, accurate study or analysis of an issue (often referred to as a "nonpartisan analysis study or research report") that is widely distributed and provides enough information about the issue to allow the reader to draw their own conclusions, even if the report contains specific legislative conclusions
- Attempt to influence legislation that impacts the private foundation's existence, powers and duties, tax-exempt status, or the deductibility of contributions (self-defense lobbying)*

Want to learn more about the rules of advocacy? Check out our Advocacy Factsheet [here](#).

*Foundations may wish to consult with an attorney to confirm the legislation would actually impact the foundation in this way prior to engaging in any attempts to influence the legislation.

SHORT TAKES - Member and Sector News

Several PSW members partnered to invest almost \$25 million in **Elevation Community Land Trust** to secure more than 700 affordable homes for low-income families in the Denver area within the next five years. The Trust's goal is to create permanently affordable housing in the Denver area, and ultimately Colorado. [Read more.](#)

Southern Oklahoma Memorial Foundation (Ardmore, OK; PSW '98) announced a \$300,000 grant to support Ardmore City Schools fine arts programming. The school district will use the funds to improve the music and fine arts programs, purchase new equipment, and give Ardmore students the ability to better compete. [Read more.](#)

St. David's Foundation (Austin, TX; PSW '99) dedicated Unity Hall at Community First! Village, an innovative neighborhood for formerly homeless people that is becoming a national model for tackling homelessness. The 13,000 square foot facility will provide office space and conference rooms, and it will also feature a commercial kitchen to support a food truck operation and catered events. [Read](#)

[more.](#)

The **Boettcher Foundation** (Denver, CO; PSW '86) announced the appointment of David Miller, executive director of the Barton Institute for Philanthropy and Social Enterprise at the University of Denver, and Rick Pederson, partner and chair of the advisory committee at Bow River Capital Partners, to its board of trustees. [Read more.](#)

The **Baptist Health Foundation of San Antonio** (San Antonio, TX; PSW '05) announced \$7 million in grants to local nonprofits. Two San Antonio nonprofits, CentroMed and ChildSafe, are among the largest recipients of the funds and represent the second and third largest grants given in the Foundation's history. [Read more.](#)

Arts patron and philanthropist Alice Walton announced the formation of **Art Bridges**, a 501(c)(3) foundation focused on sharing outstanding works of American art. Collaborating with museums and institutions of all sizes and in all regions of the country, Art Bridges will help create and fund exhibitions, bringing together art from museums, private collections, foundations, and a collection established as a part of Art Bridges. [Read more.](#)

Paso Del Norte Health Foundation (El Paso, TX; PSW '97) partnered with the El Paso sheriff's office to create a program to help end the negative stigma associated with mental illness. The Foundation donated \$140,000 over the last three years to train more than 400 sheriff's office staff on mental health first aid. [Read more.](#)

El Pomar Foundation (Colorado Springs, CO; PSW '86) is now recruiting recent college graduates for its 2018 Fellowship Class. Fellows come from a variety of educational backgrounds and a wide array of professional experiences. They share a passion for leadership, dedication to self-improvement, and a desire to invest in the communities of Colorado. [Learn more.](#)

The Ross Foundation (Arkadelphia, AR; PSW '72) Chairman Ross Whipple sat down with *Arkansas Business* to discuss his family's investment in timber, education, and the Arkadelphia Promise. [Read more.](#)

The Dallas Foundation (Dallas, TX; PSW '87) announced that Matthew Randazzo has been selected by the board of governors as the Foundation's next president and CEO. Randazzo is currently the CEO of the National Math and Science Initiative (NMSI), and will assume his new role mid-year 2018. He succeeds Mary Jalonick, who is retiring after 30 years of leadership. [Read more.](#)

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.](#)

YEAR IN REVIEW



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

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The Frees Foundation
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Dodge Jones Foundation
El Pomar Foundation
San Antonio Area Foundation
M.B. & Edna Zale Foundation
Ardmore Institute of Health
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

SEASON'S GREETINGS

