



Top Photo - Community Members celebrating at 2018 Grant Awards Reception Left Photo - TCF Board Members Adriana Blake, Maggie Evans Rael (Emeritus) and Andrea Szekeres Right Photo - Harwood Museum Youth Education Coordinator Jayne Schell, Foundation Director Lisa O'Brien and Taos Rotary Club member Del Endres

TAOS COMMUNITY FOUNDATION

At Taos Community Foundation there is charitable magic happening

BY CINDY BROWN

The foundation has been serving our community for 20 years by connecting donors to the causes they care most about.

In the past year several milestones have been reached and the excitement continues to flourish. “Nine months ago we were trying to keep up with the pace of walk-in traffic” shared Executive Director Lisa O’Brien, who is just shy of two years in her position. “The growth we have seen in the past year has pushed us to expand our staffing patterns and outline ways that allow us to be more responsive to the needs in our community.”

This spring, Taosño Louis Jeantete joined the staff. He is a graduate of Taos High and has a master’s degree in nonprofit leadership. “Louis has brought great talent to our organization,” remarks O’Brien.

She noted, “He’s brought fresh eyes to our work and is helping to frame some of our internal systems for greater efficiency. We’ve also had a cadre of volunteer and short-term interns who have assisted us with the influx of new donor conversations”.

The Foundation’s board of directors has also stepped up in new ways. In fact staff members joke that there could be a designated “Board Member in The House” sign on the front door. The foundation is actively exploring socially responsible investing options, re-assessing the fee structure on donor advised funds and gearing up for a public launch of a building campaign to purchase the existing office space.

“All of these activities strengthen our position for continued growth,” states O’Brien, who is proud that the foundation now has more than \$10 million in assets under management and finished the fiscal year June 30 with nearly \$1.1 million in grants and scholarships awarded.

Unlike other 501(c) 3 organizations, community foundations have a unique role in building charitable assets to ultimately improve the quality of life in a given area: in this case, the communities of Taos and western Colfax Counties.

Grant awards occur in a multitude of ways. The foundation may host a competitive applica-

tion cycle that has a specific time frame and uses community members who review and recommend funding. Grants may also be distributed directly from donor advised charitable funds, which do not require an application or committee review.

Some funds are restricted by a particular area of community support. Arts and culture, for instance, which directs funds exclusively for arts and cultural organizations or programs in one such fund. The foundation holds nearly 140 different charitable funds, and each of them has the potential to award grants in one way or another.

“Community foundations are complex organizations and our grant-making process is just as complex,” reports O’Brien. “Every donor is different; every grant cycle is different; the needs throughout the community are different. We do our best to facilitate all of the moving parts and to meet the diverse needs in our region.

“This past year, we’ve been evaluating our work and developing new strategies to deepen our impact in the community beyond our grant-making dollars,” shared O’Brien. One of those strategies has focused on building endowment funds for nonprofit organizations.

The foundation holds endowment funds that are designated specifically to support 23 agencies; five of which were created this year. O’Brien went on to explain, “There is a beautiful connection between estate planning conversations and agency endowment funds. As the endowment fund grows, the revenue stream in the future grows. This is all about the long-term financial picture for an organization.”

The foundation has seen a tremendous influx of individuals wanting to identify charitable gifts as part of their estate planning. O’Brien emphasized that planning ahead for legacy giving is not only for the wealthy.

“Many of us will have assets at the time of our passing. Directing all or a portion of one’s estate is a lovely way to

continue ones legacy,” she says. TCF re-established the Taos Property Foundation, which is in place solely to accept gifts of real property, such as land or homes. The proceeds of the sale of such gifts are then transferred to TCF with charitable instructions as set by the donor.

“We are finding that the conversation is an easy one,” remarked O’Brien. “The word is spreading and we are honored by folks who are referring friends to come in and talk with us.”

“The opening of the Stray Hearts Fund is a great example,” says O’Brien. “It all began with a conversation before Thanksgiving with a donor who wanted to anonymously establish a fund for Stray Hearts Animal Shelter. Since that time, three additional donors have contributed to the fund and the conversations then opened up the avenue for legacy gifts.”

Seven months later, O’Brien has received four new bequest commitments, with “three others on the horizon.” Each one of these commitments has specifically outlined a charitable gift intent within their will documents.

O’Brien explains that people have a variety of reasons that people for making a gift through the Foundation. “Philanthropy is always a leap of faith. Donors want to know that their gifts are being used wisely and for the purpose intended. Working with the Foundation can provide some donors an added sense of assurance or simply anonymity,” she said.

Trust is one of the core values of the foundation. O’Brien adds, “We are committed to this magical work of philanthropy and creating as many avenues for individuals, families, businesses and organizations to partner with us. This community means something special to each of us, and we are honored to hold this role in the neighborhood.”

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