

# THINK NEW MEXICO

A Results-Oriented Think Tank Serving New Mexicans



2019–2020 ANNUAL REPORT  
THE NM WORK AND SAVE ACT VICTORY

## About the Cover

The artwork on the cover shows a detail from a mural study completed in 1936 by Emil Bisttram (1895–1976). Bisttram was born in Hungary and came to New Mexico in 1930. He later opened the Heptagon Gallery, one of the first commercial galleries in Taos, founded the Taos School of Art, and co-founded the Taos Art Association. The mural, titled “Justice Tempered with Mercy: Uphold the Right, Prevent the Wrong,” was originally commissioned by the New Deal's Treasury Relief Art Project for the Federal Courthouse in Roswell. After this building was demolished, the mural was transported to Albuquerque where it was stored. The mural was discovered in the 1980s in the basement of a nearby federal courthouse, restored and mounted in its present location in 1983. It is currently installed on the sixth floor of the U.S. Courthouse at 421 Gold SW in Albuquerque. The mural study is reprinted courtesy of the Smithsonian American Art Museum, item #1974.28.351.

## About Think New Mexico

Think New Mexico is a results-oriented think tank whose mission is to improve the quality of life for all New Mexicans, especially those who lack a strong voice in the political process. We fulfill this mission by educating the public, the media, and policymakers about some of the most serious challenges facing New Mexico and by developing and advocating for effective, comprehensive, sustainable solutions to overcome those challenges.

Our approach is to perform and publish sound, nonpartisan, independent research. Unlike many think tanks, Think New Mexico does not subscribe to any particular ideology. Instead, because New Mexico is at or near the bottom of so many national rankings, our focus is on promoting workable solutions that will lift New Mexico up.

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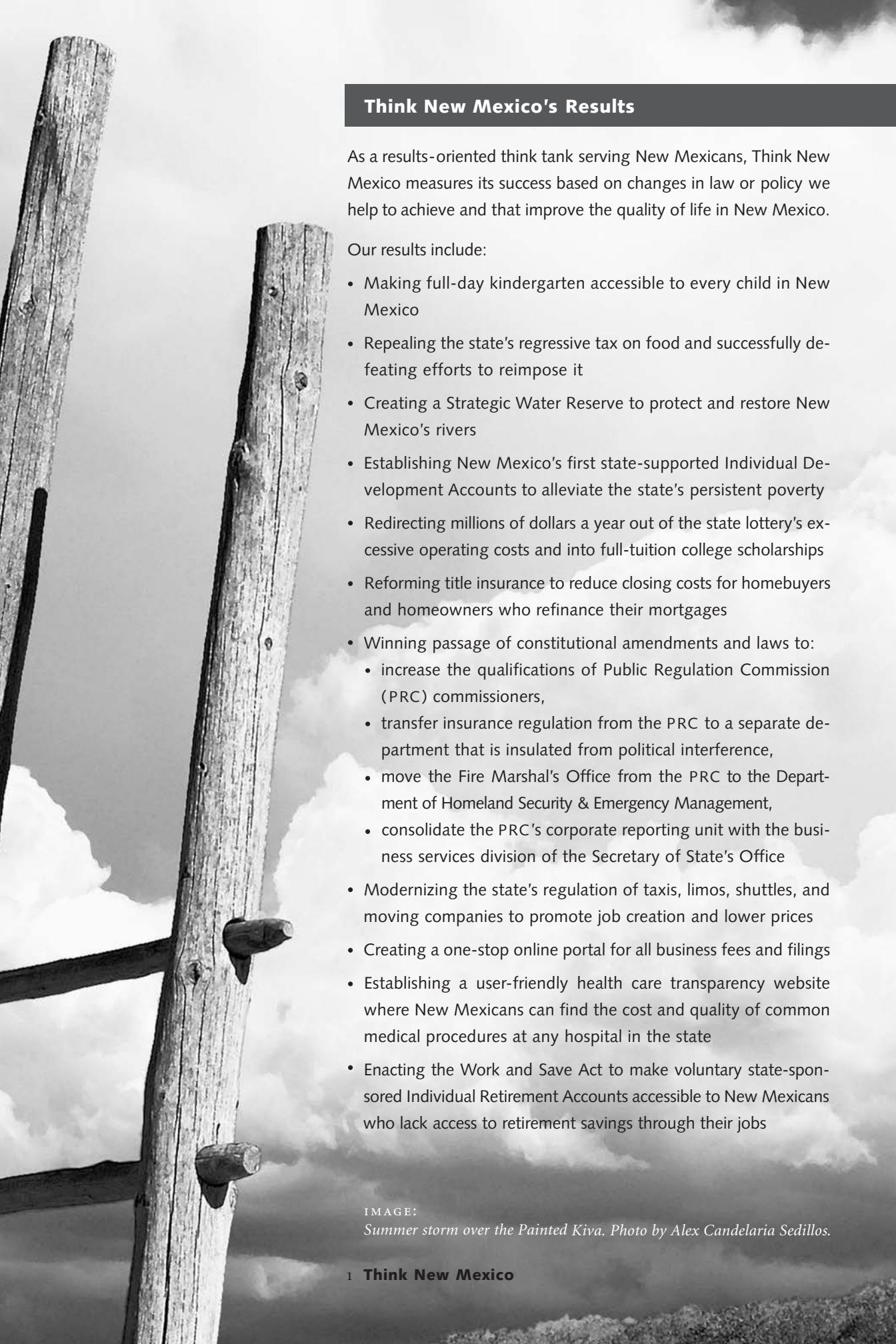
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A black and white photograph of a weathered wooden fence post. The post is vertical and shows signs of age with knots and grain. It is set against a background of a cloudy sky. The lighting is soft, highlighting the texture of the wood.

## Think New Mexico's Results

As a results-oriented think tank serving New Mexicans, Think New Mexico measures its success based on changes in law or policy we help to achieve and that improve the quality of life in New Mexico.

Our results include:

- Making full-day kindergarten accessible to every child in New Mexico
- Repealing the state's regressive tax on food and successfully defeating efforts to reimpose it
- Creating a Strategic Water Reserve to protect and restore New Mexico's rivers
- Establishing New Mexico's first state-supported Individual Development Accounts to alleviate the state's persistent poverty
- Redirecting millions of dollars a year out of the state lottery's excessive operating costs and into full-tuition college scholarships
- Reforming title insurance to reduce closing costs for homebuyers and homeowners who refinance their mortgages
- Winning passage of constitutional amendments and laws to:
  - increase the qualifications of Public Regulation Commission (PRC) commissioners,
  - transfer insurance regulation from the PRC to a separate department that is insulated from political interference,
  - move the Fire Marshal's Office from the PRC to the Department of Homeland Security & Emergency Management,
  - consolidate the PRC's corporate reporting unit with the business services division of the Secretary of State's Office
- Modernizing the state's regulation of taxis, limos, shuttles, and moving companies to promote job creation and lower prices
- Creating a one-stop online portal for all business fees and filings
- Establishing a user-friendly health care transparency website where New Mexicans can find the cost and quality of common medical procedures at any hospital in the state
- Enacting the Work and Save Act to make voluntary state-sponsored Individual Retirement Accounts accessible to New Mexicans who lack access to retirement savings through their jobs

IMAGE:

*Summer storm over the Painted Kiva. Photo by Alex Candelaria Sedillos.*

## Think New Mexico's Board of Directors

Consistent with our nonpartisan approach, Think New Mexico's board is composed of Democrats, Independents, and Republicans. They are statesmen and stateswomen who have no agenda other than to help New Mexico succeed. They are also the brain trust of this think tank.

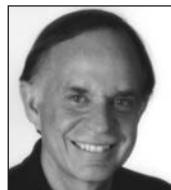
**Clara Apodaca**, a native of Las Cruces, was First Lady of New Mexico from 1975–1978. She served as New Mexico's Secretary of Cultural Affairs under Governors Toney Anaya and Garrey Carruthers and as senior advisor to the U.S. Department of the Treasury. Clara is the former President and CEO of the National Hispanic Cultural Center Foundation.



**Jacqueline Baca** has been President of Bueno Foods since 1986. Jackie was a founding board member of Accion and has served on the boards of the Albuquerque Hispano Chamber of Commerce, the New Mexico Family Business Alliance, and WESST. In 2019, she was appointed to the Federal Reserve Bank of Kansas City's Denver Branch Board of Directors.



**Paul Bardacke** served as Attorney General of New Mexico from 1983–1986. He is a Fellow in the American College of Trial Lawyers, and he currently handles complex commercial litigation and mediation with the firm of Bardacke Allison in Santa Fe. Paul was a member of the National Park System Advisory Board for seven years.



**Notah Begay III**, Navajo/San Felipe/Isleta Pueblo, is the only full-blooded Native American to have played on the PGA Tour, where he won four tournaments. He now works with Native communities to develop world-class golf properties and is also the Founder and Chief Executive Officer of KivaSun Foods. Notah founded The Notah Begay III Foundation (NB3F), which works to reduce obesity and diabetes among Native American youth.





**Garrey Carruthers** served as Governor of New Mexico from 1987–1990 and as Chancellor of the system and President of New Mexico State University from 2013–2018. In between he was Dean of the College of Business at NMSU and President and CEO of Cimarron Health Plan. Garrey was instrumental in establishing the Arrowhead Center for economic development in Las Cruces.



**LaDonna Harris**, *Emeritus*, is Chair of the Board and Founder of Americans for Indian Opportunity. She is also a founder of the National Women's Political Caucus. LaDonna was a leader in the effort to return the Taos Blue Lake to Taos Pueblo. She is an enrolled member of the Comanche Nation.



**Edward Lujan** is the former CEO of Manuel Lujan Agencies, the largest privately owned insurance agency in New Mexico. Ed is also a former Chairman of the Republican Party of New Mexico, the New Mexico Economic Development Commission, and the National Hispanic Cultural Center of New Mexico, where he is now Chair Emeritus.



**Liddie Martinez** is a native of Española whose family has lived in northern New Mexico since the 1600s. She is the Market President-Los Alamos for Enterprise Bank and Trust, and also farms the Rancho Faisan. Liddie previously served as Board Chair of the Los Alamos National Laboratory Foundation. She currently serves on Governor Michelle Lujan Grisham's Economic Recovery Council.



**Fred Nathan, Jr.** founded Think New Mexico and is its Executive Director. Fred served as Special Counsel to New Mexico Attorney General Tom Udall from 1991–1998. In that capacity, he was the architect of several successful legislative initiatives and was in charge of New Mexico's lawsuit against the tobacco industry, which resulted in a \$1.25 billion settlement for the state.



**Roberta Cooper Ramo** is the first woman elected President of the American Bar Association and the American Law Institute. Roberta has served on the State Board of Finance and was President of the University of New Mexico Board of Regents. In 2011, she was inducted into the American Academy of Arts and Sciences. Roberta is a shareholder in the Modrall Sperling law firm.

## Dear New Mexican:

Every election year, it seems like the campaign rhetoric grows a little coarser, harsher, and more partisan, and 2020 has been no exception.

By contrast, as Think New Mexico enters its third decade, we continue to focus on what truly matters: careful and thoughtful problem-solving, using fact-based research and reason to bring people together across the political divide to improve the quality of life for every New Mexican.

That approach has served us well, particularly this past year when we were successful in passing the landmark New Mexico Work and Save Act, as well as making progress on several other initiatives that are described throughout this report.

To the extent that we have been effective, a key ingredient has been our bipartisan board, which models civil discourse and respectful disagreement in their internal deliberations and in the way they lead their lives. This year we are delighted to welcome a favorite son of New Mexico, Notah Begay III, to the board.

The vision of the board is turned into action by our outstanding staff. This year, our Field Director Othiamba Umi's exceptional work to reform the state lottery was recognized when he was appointed by the Governor to serve on the lottery's oversight board.

Standing behind our board and staff is a growing group of steadfast supporters from across the Land of Enchantment. Their ranks grew in the last year from 942 to 1,067, an increase of more than 13%.

As the 2020 election approaches, I hope that we will all spend a little less time and money on the partisan warfare that drives us farther apart, and more on the local nonprofits providing food, health care, and housing assistance to those who need it most during this global pandemic. Naturally, if there is anything left over, and your circumstances are such that you can give, I encourage you to send a contribution to Think New Mexico in the enclosed yellow envelope or donate online at [www.thinknewmexico.org](http://www.thinknewmexico.org).

*Fred Nathan Jr.*

Fred Nathan, Jr.

June 1, 2020



*Susan Martin, Business Manager; Fred Nathan, Executive Director; Kristina G. Fisher, Associate Director; Othiamba Umi, Field Director. Photo by Peter Ellzey.*



In 2019, Think New Mexico launched an ambitious new initiative to achieve retirement security for all New Mexicans. We proposed three reforms: repeal the state's tax on Social Security income, ensure that every private sector worker in New Mexico has access to a retirement account that they can easily contribute to using automatic payroll deductions, and improve the performance and stability of the state's public pension funds. During the 2020 legislative session, we advocated for bills to enact all three of our reforms. The New Mexico Work & Save Act, which sets up voluntary Individual Retirement Accounts for New Mexico workers who do not have access to retirement savings plans through their jobs, passed the House on a vote of 62-1, the Senate on a vote of 40-0, and was signed into law by Governor Lujan Grisham! We'll be back in future legislative sessions to build on this success and get our other reforms to the finish line.

# The EASTERN NEW MEXICO NEWS

SERVING CLOVIS, PORTALES AND THE SURROUNDING COMMUNITIES

OCTOBER 30, 2019

EasternNewMexicoNews.com

## Need more nonpartisan problem-solvers

**Tom McDonald**

If you're on the mailing list, you got that old familiar yellow manila folder in the mail last week, from Think New Mexico. I've lost track of how many of these reports I've received over the years, nor can I remember ever having felt it was a waste of time or resources for our state of New Mexico.

This latest mail-out relates to a big issue for a lot of people — in fact, it may have the most far-reaching impact since this nonpartisan, results-oriented think tank got the sales tax off food.

Think New Mexico's latest crusade is Social Security and retirement pensions, or as its latest report is titled, "Solving the hidden crisis" of inadequate retirement funds for the state's senior citizens.

First, it calls for the state to quit taxing Social Security benefits. New Mexico is one of only 13 states that does so, even though we also have the

third highest poverty rate in the nation among people ages 65 and older.

According to the U.S. Census, 12.2% of New Mexico's seniors are living in poverty, often living on nothing more than their Social Security check — at an average annual payout of \$13,900 — while the state's annual tax on that check is \$700 a year.

We have a lot of seniors living in poverty, with Social Security as their only source of income. The Center of Budget and Policy Priorities, another nonpartisan think tank (this one based in Washington, D.C), has observed that 22.1 million Americans have been lifted above the poverty line thanks to Social Security; from Santa Fe, Think New Mexico has broken that number down to 111,000 New Mexicans lifted out of poverty by their Social Security checks.

...

Other recommendations in Think New Mexico's report would also be of great consequences if acted upon. They're also pushing for the state to encourage private-sector retirement savings by requiring that employees offer a "default option" in which new employees, unless opting out, would automatically be enrolled in an "Auto-IRA" with payroll deductions that would go into a retirement account. It's a way to offset the fact that two of three workers in our state don't have a private retirement savings of any sort, and it wouldn't cost employers a dime.

The great thing about Think New Mexico is they don't just think through such issues, they push for actual, quantifiable reforms. We need more nonpartisan problem-solvers like 'em.

**Tom McDonald is editor of the New Mexico Community News Exchange. Contact: [tmcdonald.srn@gmail.com](mailto:tmcdonald.srn@gmail.com)**

# NM's golden years need some green

## Tax, savings and pension reforms would attract retirees, help seniors make those years affordable

*"A crisis is quietly growing in New Mexico."*

— "Solving the Hidden Crisis: Achieving Retirement Security for all New Mexicans," from Think New Mexico

Two-thirds of New Mexicans who work in private industries don't have access to an employer-provided retirement fund, matched or unmatched.

The state's public-employee pension funds for government workers are significantly underfunded.

Nearly 80% of New Mexicans have less than \$10,000 in savings at all.

Around 12.2% of New Mexico's senior citizens are living in poverty, compared to the national average of 9.3%.

And there's evidence to suggest that, without intervention, these problems will get worse. Don't forget, more baby boomers — the youngest who are 55 this year — are hitting retirement age every day.

Something's got to give.

Enter Think New Mexico. Journal capital bureau chief Dan Boyd reported Oct. 6 the Santa Fe-based think tank has a three-pronged plan to fundamentally change the landscape for current and prospective retirees for the better. Executive director Fred Nathan's recommendations not only make sense — they make a strong argument that would attract more retirees while helping ensure retirement is more comfortable for our current and future senior citizens. Think the reforms would only help older folks? You're forgetting those residents can either be self-sufficient and contribute to the local economy, or require more social services just to get by.

### Stop taxing Social Security

New Mexico is one of only 13 states that tax Social Security payments as income, and the second toughest after Utah. Think New Mexico estimates that getting rid of that tax — which any retiree with an income over \$28,501 pays in full — would make a difference of nearly \$700 per year for the average N.M. senior. For those nervous about the \$73 million in state revenue the repeal would cost, the organization suggests a mid-level measure that would repeal the tax for lower- and middle-income New Mexicans drawing Social Security.

It's worth pointing out repealing N.M.'s tax on Social Security income wouldn't likely make much difference for the poorest seniors in the state, who are exempt already. But many of these changes could go a long way in making our state more attractive to middle- and

upper-class seniors from elsewhere in the country — and who would offer significant contributions to our local economy if they chose to enjoy their retirement here.

### Set up private-sector retirement accounts

Not all employers are in a position to set up retirement plans for their employees, much less offer a matching contribution. But those of us fortunate enough to have retirement contributions automatically deducted from our paychecks know that if we don't see the money, we are unlikely to miss it.

Think New Mexico has built on a smart proposal from AARP and makes a strong case to make it easier for employers to set up an opt-out contribution plan for workers. Think it's not needed? Look at the stats above.

It has worked impressively well elsewhere — Oregon has more than 2,600 employers and 52,000 employees participating, with almost \$11 million socked away for retirement. That beats N.M.'s status quo, too many seniors trying to live on \$13K in annual Social Security checks

### Tackle public pension woes

The most complex part of Think New Mexico's plan for retirement security has to do with bolstering the state's public pension plans. As Boyd reported, the Public Employment Retirement Association and the Educational Retirement Board had a combined unfunded liability of \$13.5 billion in 2018. For the layperson, that means the state has committed to \$13.5 billion more in current and future benefits than it has lined up in assets.

Of course, pension plans don't really need to be 100%-funded to be sustainable. After all, how likely is it that every pension-eligible public employee retires tomorrow? But the current gap — PERA is funded at 71.6% and ERB at 63.5% — is too wide for comfort. So N.M. could:

Raise the bar for board members governing PERA and ERB. This one just makes sense. Pensioners deserve qualified money managers making sound investment decisions, and qualifications are sorely lacking. While it's important to have someone on the board who answers to the voters, it's essential members understand the complex investment landscape for taxpayers and pensioners alike.

# Avert the looming retirement crisis: Pass HB 44

**MY VIEW** FRED NATHAN AND KRISTINA G. FISHER

A crisis is quietly growing in New Mexico. In 2018, researchers at the University of New Mexico released a report showing that nearly 80 percent of New Mexicans working in the private sector have less than \$10,000 saved for retirement. About two-thirds have nothing saved.

When these New Mexicans are no longer able to continue working, they will depend entirely on Social Security benefits. Unfortunately, the average benefit is only about \$13,900 a year, while the cost of food, housing and health care averages more than twice that: \$28,000 a year, according to the U.S. Bureau of Labor Statistics.

The biggest reason why New Mexicans are not saving for retirement is they do not have access to retirement savings plans through their jobs. In fact, New Mexico has the lowest rate in the nation of workers with access to job-based retirement savings.

This matters because research shows that people are 15 times more likely to save for retirement when they are able to do so through their jobs, with the savings automatically deducted from their paychecks.

The reason why most private sector jobs in New Mexico do not offer retirement plans is that businesses in our state tend to be very small, with most employing fewer than five people. The hardworking owners of these small businesses have

their hands full keeping the doors open and making payroll, and they often do not have the time, expertise or resources to set up 401(k) plans for their workers.

That is where the New Mexico Work and Save Act, House Bill 44, comes in. This legislation is sponsored by Reps. Tomás Salazar, D-Las Vegas; Gail Armstrong, R-Socorro; Christine Chandler, D-Los Alamos; and Sens. Bill Burt, R-Alamogordo; Michael Padilla, D-Albuquerque; and Bill Tallman, D-Albuquerque; and supported by groups including Think New Mexico, AARP-NM and the Association of Commerce and Industry, the statewide chamber of commerce.

The New Mexico Work and Save Act creates a system of voluntary state-sponsored Individual Retirement Accounts that private sector workers can contribute to through their jobs using automatic payroll deductions.

Participation is completely voluntary for both businesses and workers. Businesses choose whether they would like to offer the IRAs to their workers, and workers choose whether to participate and how much they would like to save from each paycheck. Employers pay no fees and provide no matching contributions. All a participating business has to do is share information about the program with their employees and set up the automatic payroll deductions.

These Work and Save IRAs would be

similar to the 529 college savings plans that have been available in all 50 states for the past two decades. A 529 plan is an individual investment account where people can save for college expenses for their children or grandchildren.

Like 529 accounts, Work and Save retirement accounts will be overseen by a public board whose members have relevant financial and investment management qualifications. The board would select default investment options for participants, like diversified target retirement accounts, and provide financial literacy tools. The cost of the program will be covered by small fees on the accounts (capped at 1 percent).

Several other states already are achieving promising results with similar programs. For example, in Oregon, which began implementing a Work and Save Act in 2015, over 2,600 employers signed up and more than 52,000 individuals saved \$10.9 million in the first three years.

With over 336,000 New Mexicans lacking access to job-based retirement savings, it is urgent that we act now to ensure that the next generation of seniors have the resources they need to retire with dignity. Visit [thinknewmexico.org](http://thinknewmexico.org) to urge your legislators to pass the New Mexico Work and Save Act, House Bill 44.

*Fred Nathan is executive director of Think New Mexico. Kristina G. Fisher is associate director of Think New Mexico.*

## Lujan Grisham OKs Work and Save Act

**By Jens Gould**

[jgould@sfnewmexican.com](mailto:jgould@sfnewmexican.com)

Gov. Michelle Lujan Grisham signed three bills into law Tuesday, including legislation aimed at improving services for seniors as a growing elderly population and rising costs have made it more difficult for New Mexico to meet needs.

...

The governor also signed the

New Mexico Work and Save Act, which will provide access to a voluntary savings program for privately employed and self-employed workers who do not have retirement accounts related to their employers.

House Bill 44 also sets up a web-based marketplace where employers can offer retirement savings plans. Workers can open new accounts in January 2022.



PHOTO (L-R): DeAnza Valencia, AARP-NM Associate State Director for Advocacy; State Treasurer Tim Eichenberg; and Think New Mexico Associate Director Kristina G. Fisher prepare to present the New Mexico Work and Save Act to a legislative committee, February 11, 2020.



PHOTO (L-R): Signing ceremony for the New Mexico Work and Save Act, February 26, 2020. Think New Mexico Executive Director Fred Nathan, Senator Michael Padilla, Representative Gail Armstrong, Governor Michelle Lujan Grisham, Representative Tomás Salazar, Senator Bill Tallman, former AARP-NM President Jackie Cooper, and Think New Mexico Field Director Othiamba Umi.

## Repeal New Mexico's tax on Social Security benefits

Fred Nathan & Kristina G. Fisher

It is time to repeal New Mexico's counterproductive tax on Social Security benefits.

For more than half a century after Social Security was enacted in 1935, benefits were not taxed in New Mexico.

In 1990, the New Mexico Legislature passed a long and complex bill changing how pensions were taxed (and raising more than \$13 million for state government). Buried on the second to last page of that bill was a single line that imposed the state's income tax on Social Security benefits. This provision received no public scrutiny.

Today, New Mexico is one of only 13 states that tax Social Security benefits. The tax costs the average New Mexico senior nearly \$700 a year.

Social Security is the sole source of income for one in three New Mexico seniors. The average benefit is only about \$13,900 a year, while the average annual cost of food, housing, and health care for older Americans is nearly twice as high: about \$28,000, according to the U.S. Department of Labor.

Taxing Social Security benefits undermines the purpose of Social Security, which was designed to lift seniors out of poverty — not to fund state government.

New Mexico's Social Security tax also has a negative impact on our economy. If seniors were able to keep the money that they now pay in taxes, much of it would be spent immediately and those dollars would go right back into New Mexico's economy.

One reason why most states do not tax Social Security benefits is to attract and retain retired people as an economic development tool. Taxing Social Security tax hurts New Mexico in "best states to retire" lists. Last year, for example, Kiplinger's magazine profiled the 13 states that still tax Social Security benefits, and listed New Mexico among the least tax-friendly states for seniors.

The state's tax on Social Security benefits is a form of double taxation. New Mexicans pay income tax on the money they put into Social Security, and then they are taxed again on the benefits they receive.

Lawmakers could simply repeal New Mexico's tax on Social Security benefits without any offsetting revenues, since taxes were already raised last year on automobiles and internet sales, among other things. This would decrease state tax revenues by about \$73 million a year, according to the state's Legislative Finance Committee.

Another option would be to follow the model of the laws enacted by West Virginia and North Dakota earlier this year. Both states targeted their tax exemptions to lower and middle income residents by repealing their taxes on Social Security benefits for married taxpayers with incomes less than \$100,000 and for all other taxpayers with incomes less than \$50,000.

Enacting a similar reform in New Mexico would reduce state tax revenues by \$21 million to \$29 million. That represents about one third of 1 percent of New Mexico's \$7 billion state government budget.

Think New Mexico is not alone in supporting this reform. In recent years, bills to repeal or reduce New Mexico's tax on Social Security benefits have been introduced by Representatives Gail Armstrong (R-Socorro), Daymon Ely (D-Albuquerque), and Patricia Roybal Caballero (D-Albuquerque).

We hope you will contact your legislators and Gov. Lujan Grisham and urge them to support legislation repealing the tax on Social Security. You can learn more and email your policymakers from Think New Mexico's website at: [www.thinknewmexico.org](http://www.thinknewmexico.org).

*Fred Nathan is executive director and Kristina G. Fisher is associate director of Think New Mexico, a nonpartisan, results-oriented think tank that recently released a report on improving retirement security.*

# Sneaky state SS tax unfair; time to end it

It is a tax snuck in via a single line on the last page of a bill in the waning hours of the 1990 legislative session, with no public comment, as a way to pay for state programs.

And since then, New Mexico has unfairly taxed Social Security benefits — money recipients already pay state and federal taxes on when they earn it.

Only 13 states tax Social Security, and New Mexico has one of the heaviest hands when it comes to snatching that hard-earned money from its retirees. According to Santa Fe-based think tank Think New Mexico, eliminating the state's income tax on Social Security benefits would save the average senior citizen nearly \$700 a year.

There are at least six bills making their way through the Roundhouse that would repeal or reduce the tax on Social Security. The Journal has received numerous letters from

some of the state's estimated 120,000 residents 65 and older on the topic — many say it's unfair double taxation because they paid income taxes on the money they put into Social Security. Some say it was a factor in their decision to retire elsewhere.

Eliminating the income tax on Social Security could better position New Mexico as a retirement mecca, boosting the state's population, stimulating the economy and raising GRT and other revenues. That would help offset the estimated \$75 million in tax revenue lost by a repeal.

Moreover, the state is projected to rake in an additional \$797 million this year due to the oil boom. While the boom won't last forever, restoring equity to the tax system and saving seniors a month's rent, several grocery bills or car payments, even a trip to see loved ones is a legacy worth seizing during good economic times.



Cartoon by John Trever for the Albuquerque Journal, February 9, 2020. Reprinted by permission.

## PERA board session derailed by infighting

Member stormed out of meeting for body that runs state workers' pension fund

By Michael Gerstein

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A meeting this week of the state Public Employees Retirement Association board boiled over when one member stormed out, accusing others of “abetting and aiding” an alleged assault on her, a video shows.

Trustee Loretta Naranjo Lopez demanded fellow board members remove all items from Tuesday’s agenda after alleging fellow Trustee Stephen Neel had assaulted her and attempted to steal her cellphone during a previous meeting.

“The board has been given, has allowed themselves to be abetting and aiding this crime. I don’t see how they can be voted today,” she said, the video shows. “So I’m just asking that these items be removed from the agenda.

“I will not be allowing a quorum to allow state law to be violated,” she added before leaving the room.

Afterward, fellow board members talked among themselves, disputing Lopez’s account of the incident.

The incident is the latest example of a PERA board meeting derailed by infighting. Two years ago, a meeting was disrupted when board members debated for close to six minutes about whether PERA should pick up the tab for their snacks.

...

During the meeting two years ago in which a snack debate erupted, Lopez

said she was “very disgusted with the lack of service they have received on staff,” a video shows, while another trustee, Patricia French, stormed out in apparent frustration after hearing board members might have to pay for their own snacks.

The board chairperson then adjourned the meeting, and members walked out after Lopez made a motion to replace two top executives of PERA and place the chief information officer on probation because she had violated the state Open Meetings Act by broaching a topic that wasn’t on the agenda.

“Jesus. God. That was two years ago. I couldn’t talk to you about it. I just can’t remember,” French said, when asked about the food feud.

But to some, including Toulouse Oliver and others seeking to change the PERA board seats to appointed rather than elected positions, these kinds of incidents are all examples of why such reform should happen.

State Sen. George Muñoz, a Gallup Democrat, has sponsored legislation requiring higher qualifications for trustees.

...

Fred Nathan, founder and executive director of the nonprofit policy think tank Think New Mexico, called PERA board conflicts “sadly all too common.”

“The extreme dysfunction undermines the board’s ability to effectively manage nearly \$16 billion that approximately 90,000 state workers and retirees are depending on for their pensions,” Nathan said. “It is urgent that Governor and the Legislature take action to upgrade the qualifications of PERA Board members and improve the professionalism of this board.”

## Lottery CEO's pay comes at expense of NM students

BY FRED NATHAN

*Think New Mexico*

**T**he New Mexico Lottery Authority recently voted to raise Lottery CEO David Barden's salary by 26%, from \$174,142 to \$220,000.

That is twice as much as the governor of New Mexico is paid. It is more than twice what the state Attorney General is paid. It is significantly more than the chief justice of the Supreme Court and state cabinet secretaries are paid.

As a spokesman for Gov. Lujan Grisham put it: "What is the rationale" for this enormous raise? "Is the lottery doing a 26% better job of getting scholarship money to New Mexico students? I think if people find this salary and increase to be inequitable or improper, given the primary goal of the program, they have some justification for feeling that way."

After all, every dollar going to excessive compensation for the Lottery CEO is a dollar less for college scholarships for deserving New Mexico students. The statutory purpose of the New Mexico Lottery is to "provide the maximum amount of revenues" for scholarships at the state's public universities.

Beyond the huge bump in pay, the Lottery CEO's new contract also includes an additional 4% "salary reten-

tion adjustment" that will raise the CEO's salary another \$8,800 effective July 1, 2020, and a "car allowance" worth an unspecified amount.

...

Perhaps most shockingly, the contract includes a golden parachute provision stating that the CEO will receive \$440,000 if he is terminated "without cause" prior to July 1, 2020, and will be paid his full three-year contract amount (\$677,600) if he is terminated "without cause" before the contract ends.

...

What is most troubling about the Lottery's CEO's excessively generous new contract is that the CEO has spent the past five years lobbying the legislature to reduce the percentage of lottery revenues going to the scholarship fund.

During the Lottery's first decade, only about 23 cents of every dollar bet on the Lottery reached the scholarship fund. Another 55 cents was used for prizes, and 22 cents went into overhead and administrative costs.

Think New Mexico successfully championed the enactment of a law in 2007 guaranteeing that at least 30% of lottery revenues must go to scholarships. It worked: the Lottery has delivered more money to scholarships every year since the 30% guarantee

was enacted than it did in any year before (an average of \$42 million a year, an increase of about \$9 million a year).

Despite this strong track record of success, during the past five legislative sessions Lottery CEO Barden has lobbied in tandem with the international gaming vendors that contract with the New Mexico Lottery to try to repeal 30% guarantee. (Profits for those outside vendors are tied to total lottery revenues, not the amount of dollars going to scholarships.) In 2019, the bill supported by Barden and the vendors would have lowered the amount delivered to scholarships to \$40 million in 2020, \$40.5 million in 2021, and \$41 million every year thereafter.

Thankfully, the legislation failed to pass, and under the 30% guarantee, the lottery delivered approximately \$43.2 million to scholarships this year – over \$3 million more than it would have received if Barden's bill had passed.

...

We urge Gov. Lujan Grisham to act swiftly to replace as many member of the Lottery Authority board as possible with New Mexicans who will put students first and focus on maximizing dollars for scholarships, consistent with the statutory purpose of the lottery.



Think New Mexico has been working to reform the New Mexico Lottery since 2006, when we discovered that only about 23 cents of every dollar bet on the state lottery were reaching the college scholarship fund. In 2007, we won passage of a law guaranteeing that at least 30% of lottery revenues will be dedicated to scholarships. That reform has delivered an additional \$9 million a year to students. In the years since, we successfully defended the 30% guarantee from attacks by the multinational gaming corporations whose profits were reduced when more of the lottery dollars began going to scholarships. In 2019, we uncovered and publicized the lottery's decision to give its CEO a massive pay increase, and we recommended that Governor Lujan Grisham overhaul the lottery oversight board. The good news is that she did, and one of the new board members she appointed is Think New Mexico's Field Director, Othiamba Umi! Othiamba is a perfect fit for the board, as he not only benefitted from a lottery scholarship during his time as a student at UNM, but he has also attended just about every lottery board meeting over the past four years to serve as a watchdog for the public. We are optimistic that this transformed board will refocus the lottery on its core mission: maximizing dollars for students.

## RUIDOSO NEWS

PART OF THE USA TODAY NETWORK

DECEMBER 25, 2019

# Scholarship advocate appointed to NM lottery board

ALBUQUERQUE (AP) — Gov. Michelle Lujan Grisham has appointed five people to the board that oversees the state lottery, including an official with a nonpartisan think tank that has advocated for changes in New Mexico's lottery-funded scholarship program.

The appointment of Othiamba Umi, field director at Think New Mexico, was announced Monday. A native New Mexican, Umi earned degrees from the University of New Mexico and worked as an attorney in the 2nd Judicial District Attorney's Office before joining Think New Mexico in 2014.

Others appointed to the New Mexico Lottery Authority include Leo Romero, former dean of the University of New Mexico School of Law; Key Investigations owner David Keylon; accountant Reta Jones; and Nina Thayer, who is retired from Los Alamos National Laboratory.

Umi is among those at the think tank who have been fighting efforts in recent years to roll back the percentage of lottery revenues that are funneled to the scholarship program. Currently, at

least 30% of revenues go toward the scholarship fund.

Think New Mexico Executive Director Fred Nathan praised the appointments, saying the new board members can help "re-focus the lottery on its purpose of maximizing dollars for scholarships, rather than maximizing dollars for the CEO and the politically connected multinational gaming corporations that contract with the lottery."

Lottery officials and others have argued that eliminating the guarantee would allow for more money to be spent on prizes and promotion, which could result in more money flowing into the scholarship fund.

According to Think New Mexico, the 30% guarantee has resulted in an average of about \$9 million more going to scholarships each year.

"As a past recipient of the lottery scholarship, I appreciate the importance of this funding for students and I am honored to have a chance to make sure they have a strong voice on the lottery authority," Umi said in a statement.

Five years ago, Think New Mexico launched an initiative to establish a transparent and merit-based process for funding public infrastructure projects. Unfortunately, New Mexico continues to be the only state that divides up its public infrastructure dollars among all 112 legislators and allows them to spend the money in their sole discretion while keeping secret which legislators are sponsoring which projects. As oil and gas prices have fallen, the dollars available to spend on infrastructure have grown increasingly scarce and precious, and it is more important than ever to direct these dollars to urgently needed infrastructure priorities. We will continue working to improve the way New Mexico funds infrastructure so that essential projects are fully funded and our infrastructure dollars create as many jobs as possible.



ALBUQUERQUE JOURNAL

MAY 20, 2019

# NM’s capital outlay needs an accountability plunger

*“Capital planning is a virtual oxymoron in New Mexico.”*  
— Governing Magazine

If you shove \$925 million into a pipeline that already has a \$737 million backlog, what do you think is going to happen?

The best-case scenario is a whole lot of nothing. The worst, a whole lot of nothing good. And yet New Mexico continues to shove hundreds of millions of desperately needed dollars intended to improve aging or build new infrastructure into what amounts to a broken pipeline.

Make that a pipeline with little oversight and even less accountability.

New Mexico is the only state in the nation that carves up its capital spending like political pork, with chunks going to the governor, senators and representatives. They do not have to prioritize projects, ensure they are fully funded, check to see if they are wanted or needed by the communities getting them, or put their names on the spending requests. It is a random process that forgoes game-changing infrastructure investments in clean water, safe bridges and driveable highways for things like half-built courthouses and thousands of small items, including band uniforms, gym mats and grass seed financed via 10-year bonds. Much of what actually gets purchased is used and discarded long before its debt is paid.

Worse, much of what is funded never comes to be, leaving hundreds of millions of dollars on the sidelines that should be working to improve New Mexico.

And some that is allocated is misused, for salaries (the National Hispanic Cultural Center has been ordered to repay) or private gain (former Torrance County Sheriff Heath White is charged with embezzling public funds intended for department vehicles).

The only state system ranked worse is Alabama, which has no system at all.

For years, lawmakers have killed smart capital outlay reform bills that would inject responsibility to New Mexico taxpayers. Santa Fe-based Think New Mexico has proposed setting up a bipartisan commission to vet and rank projects based on need, as well as requiring lawmakers to put their names on what they are spending public money on. But the current system, which the backlog proves is not working for taxpayers or residents, works just fine for politicians.

And now New Mexico has shoved another \$925 million into its plugged-up capital outlay pipeline. When the 2020 budget-centric legislative session begins, first on the to-do list should be for lawmakers to show how many projects are still in the backup.

And how many have taken public money right down the drain.



For the second year in a row, the state budget included language to ensure that more of New Mexico's education dollars will actually reach students and teachers in the classroom, rather than being spent on central administration. This budget provision resulted from the initiative Think New Mexico launched in 2017, when our research revealed that 61 of the state's 89 school districts grew their central administrative spending faster than their classroom spending over the past decade. Statewide, school district central administration grew more than twice as fast as classroom spending. Our reform requires school districts and charter schools that spend significantly less in the classroom than their similarly-sized peers to shift more of their resources into the classroom. This spring, as districts tightened their budgets in response to the pandemic, both Albuquerque and Santa Fe cut administration and protected classroom spending.

ALBUQUERQUE JOURNAL

MARCH 9, 2020

# Budget will ensure more money gets to NM's classrooms

*"The administrative overhead in our schools is outrageous. (Changing that is) going to be hard. Everyone is going to fight it. And you know what? They are all supporting me. Great. But if they think I'm not taking on this fight, they don't know who I am. We're taking it on. You have to. It's outrageous."*

— Then-candidate Michelle Lujan Grisham

*"I have vowed to make my administration's educational priorities — indeed, priorities in any issue area — abundantly clear. Students come first."*

— Gov. Michelle Lujan Grisham

Two years ago, our now-governor was ready to ensure more of the billions of dollars New Mexico taxpayers allocate to K-12 education go to classrooms. This year, the state Legislature has given her the mechanism to do just that.

Now all the state's students, parents and taxpayers need is for Lujan Grisham to sign HB 2, the state's budget bill, and keep intact an essential provision that mandates a higher percentage of classroom spending in public schools.

The 227-page, \$7.6 billion appropriations legislation allows the governor to line-item veto specific items. It would be a travesty to our children to see the provision stricken.

For Albuquerque Public Schools, the bill requires that 80% of its general fund be spent on instruction, student support services and instructional support services — i.e. teachers, materials, principals, counselors — things and individuals who directly impact the learning day.

For the state's other 88 school districts and 100-plus charter schools, the Public Education Department is directed to reject budgets that spend significantly less in the classroom than peer districts.

It's an essential piece of being accountable to students and taxpayers. A 2017 report by Think New Mexico, a Santa Fe-based think tank, found that just 57 cents of every dollar meant for public schools went to instruction, meaning 43 cents goes for everything from administrative travel to

public relations and lobbyists. Think New Mexico found between 2006 and 2017, 61 of the state's 89 school districts grew central office administrative spending faster than classroom spending. According to the Legislature's finance staff, statewide spending on administration grew by 34% in the past decade, double the growth in classroom spending.

That's shortchanging taxpayers and especially students. The need to ensure funding gets to them has been amplified by the huge increases in recent years. HB 2 includes a \$216.8 million increase for the state's public primary and secondary schools. That boost comes on the heels of an extra \$447 million added in 2019. New Mexico now dedicates \$3.47 billion a year to our K-12 public schools.

And while an impetus for the increases is the landmark 2018 Yazzie/Martinez court ruling, in which the late Judge Sarah Singleton ruled the state wasn't meeting its constitutional obligation to provide a sufficient education for all students, especially those considered "at risk," Singleton also wrote that PED and school districts were not doing enough to ensure money is spent in ways that will improve outcomes for at-risk students.

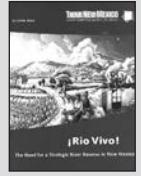
Look no further for proof of that than the fact just 30% of N.M. students can read at grade level and 20% can do grade-level math. Getting more money to the classrooms those children are in is essential to improving those numbers.

In 2018 Democratic Rep. Bobby Gonzales, former superintendent of Taos Municipal Schools and now a member of the state Senate, and Republican Rep. Larry Larrañaga, who passed away later that year, wrote an op-ed published in the Journal emphasizing "how education dollars are spent is as important as how much is spent."

There is \$3.47 billion on the K-12 line this year, and our students and their futures deserve so much more than 57 cents on the dollar. When HB 2 is signed into law, complete with that provision, New Mexico will know its Legislature and governor agree.



This year's budget bills included funding for two of Think New Mexico's ongoing initiatives. First, \$900,000 was appropriated to finish creating an All-Payer Claims Database, which will gather the data needed to complete New Mexico's health care transparency website (nmhealthcarecompare.com). Second, \$750,535 went to the Strategic Water Reserve, the innovative water management tool that Think New Mexico designed and won passage of back in 2005.



ALBUQUERQUE JOURNAL | TUESDAY, OCTOBER 22, 2019

## NM to soon know health costs

THE JOURNAL was absolutely right when it wrote in its Oct. 7 editorial that making health care prices — and outcomes — more transparent is an essential step toward “solving the more deep-rooted issues plaguing our medical system.”

Fortunately, New Mexico is poised to take a big step forward toward health care price transparency.

During the 2019 legislative session, the Legislature and governor approved funding to establish an All-Payer Claims Database (APCD) in New Mexico, similar to those in effect in 18 other states. The APCD will collect information on the actual prices paid for health care by New Mexicans. This data will then allow the Department of Health to determine the average prices paid for medical procedures by patients with different types of insurance — and make those average prices transparent to the public on the state's fledgling health care transparency website, nmhealthcarecompare.com, along with relevant quality metrics.

With the help of legislators from both parties, Think New Mexico successfully advocated for the enactment of legislation creating the health care transparency website back in 2015. However, because the state lacked an APCD, the only health care price data that the state had access to was Medicaid payments, which are not reflective of the prices paid by the hundreds of thousands of New Mexicans with individual or employer-based insurance. This lack of data has greatly limited the usefulness of the transparency website.

With the APCD, the Department of Health will soon be able to post real, relevant pricing data on the transparency website and give every New Mexican a valuable tool to shop around for the highest quality, most affordable health care.

**KRISTINA G. FISHER**  
Associate Director, Think New Mexico  
Santa Fe

ALBUQUERQUE JOURNAL MONDAY, MARCH 9, 2020

## Legislature puts \$750,535 into strategic water reserve

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Albuquerque Journal

**BY THERESA DAVIS**  
JOURNAL STAFF WRITER

New Mexico must deliver a certain amount of water to Elephant Butte Reservoir as part of the Rio Grande Compact with Texas. State and regional water agencies are also required to protect river habitat for sensitive species.

To help meet those obligations, the state Legislature allocated \$750,535 this year to the Interstate Stream Commission for the strategic water reserve. It was the most money directed to the program since 2014.

The agency uses the money to acquire water rights from owners willing to sell or lease water.

In 2005, the state created the strategic water reserve with \$2.8 million in initial funding, and has allocated about \$6.2 million in total to the commission for the program. The commission has spent more than \$3.3 million to lease or purchase more than 1,880 acre-feet — about 614 million gallons — of additional water rights.

The reserve has suffered from limited funding. Water rights acquisitions are costly and can take years. In 2014, the Legislature allocated \$2 million to the reserve, but in 2017, that balance was reallocated. Last year the program received \$242,000.



Storm over the Rio Grande, circa 1935. Photo by T. Harmon Parkhurst, courtesy Museum of New Mexico.



For over a decade, Think New Mexico has been championing smaller schools, which the research shows tend to have better student achievement and higher graduation rates, particularly for the most vulnerable students. We continue to speak up against school district proposals to close small schools, especially those serving students from low-income families, since these children benefit the most from smaller schools.

### SANTA FE REPORTER

MARCH 11, 2020

## Thinking about Small Schools

BY LEAH CANTOR

Santa Fe's public school district needs more small schools—not less—if it truly wants to equitably meet the needs of all of its students, says Think New Mexico's Founder and Executive Director Fred Nathan. Closing small schools like those in the proposal tabled by Santa Fe Public Schools last year is almost always presented as a money-saving measure, but Nathan believes the district can save more by looking at very different kinds of cuts.

In 2008, Think New Mexico published two policy reports about schools. One favored maintaining and creating more small schools in the state, citing research from across the country to argue that small schools are better at meeting the emotional and academic needs of students. The second report looked at how districts could allocate more money to the classroom by cutting central administrative costs. ...

**SFR:** What aspects from the 2008 reports do you think are still most relevant to the conversation today, and why do you think small schools are better?

**Fred Nathan:** We don't think we should be closing any schools in any part of the city. And instead, we think they should be building smaller schools on the south side and redistributing the population in the other parts of the city by redrawing the boundaries so that every student can attend a school of 400 students or less.

When you say that students generally do better in smaller schools, that doesn't mean that every large school is terrible. And it doesn't mean that every small school is terrific. But based on the research, on balance, students have a higher probability of success when they're learning in small environments, especially when they come from disadvantaged backgrounds....The problem with how we've organized our schools since the 1940s is that we've done it based on the factory model. And if kids were widgets, that would be the right model. But because they are individuals with feelings and emotions, they don't do well in these conveyor belt environments. ...

**SFR:** You say we should be building more small schools on the Southside and keeping the northside small schools open, but how could the district pay for that?

**Fred:** It turns out when you look at individual school budgets, on average, about 80% goes to faculty salaries and benefits. So it stands to reason if you move school kids from school A to school B, the teachers are going to come with the students because they still want to keep class sizes the same, meaning that the district doesn't actually save that much in operating budget by closing schools. ... Where the district should really look for savings is in the central administrative office. Districts potentially have thousands of dollars of unexamined savings that could come from administrative cuts.

**SFR:** What about for the cost of buildings themselves?

**Fred:** If you're just looking at what's the cost to build a school for, you know, 1,000 elementary school students versus 400, no question it's cheaper to build them big than to build small on a per capita basis. But again, you have to think about what's the purpose of the school—do we want them to perform at a higher level?

If you judge schools based on their graduation rates, so this has to do with high schools...the cost per graduate is actually far less at smaller schools. In elementary, students are more likely to feel supported and engaged. ...

**SFR:** Okay so, to cut operating costs, you say we should look at administration. But you're not talking about nurses or coaches, you're pretty much talking about everyone who works for the superintendent, is that right?

**Fred:** Yes, we are talking about central office administrators, not about coaches and nurses. ... When we are looking at the limited resources what we need to do is shrink administrative expenses and take those resources and push them down to the school sites and to the classrooms where they're most needed. And there are districts in New Mexico that do that. In 2008 we looked at some of the districts that are highest performing to see what they had in common, such as Gadsden, and Farmington, or this tiny rural agricultural district called Texico—and one thing we found is they spend a much higher percentage of their money the classrooms than the state average and spend less on administration.

## 2020 LEADERSHIP INTERNSHIP PROGRAM

This year, as many organizations cancelled their summer internship programs, Think New Mexico ramped up our Leadership Internship, accepting our largest class ever. We believe that mentoring the next generation of New Mexico leaders is more important than ever, and we look forward to teaching this year's six interns how they can make a difference here in their home state.

**Rohan Angadi** grew up in Clovis, NM, where he was the Valedictorian and Student Body President of Clovis High School. Rohan is now a junior at Yale studying economics and mathematics and serving as the Head Coordinator of the Asian American Cultural Center.

**Daniel Estupiñan** was raised in Sunland Park, NM and earned a BA in Business Administration and Finance from NMSU. While an undergraduate student, he was elected to the Gadsden Independent School Board. Daniel is now earning a Masters in Public Policy from the Harvard Kennedy School.

**Chloe Larkin** graduated from the United World College in Las Vegas, NM and is a junior at Wellesley College. Throughout high school, she was active in New Mexico Youth and Government, and was elected Youth Governor for New Mexico in 2018. Chloe previously interned for the New Mexico Secretary of State.

**Kate Monahan** grew up in Santa Fe and is graduating from the University of Southern California with a degree in Law, History & Culture. She has previously interned with Senator Tom Udall and Fix It America, where she worked on election reforms.

**Raffaele Moore** was raised in Albuquerque and is a junior at Brown University. He has previously interned for Senator Martin Heinrich and Mayor Tim Keller, and he has also served as a Victim's Advocate for the Bernalillo County District Attorney.

**Ariane Talou** grew up in Santa Fe and is a junior at UCLA. She has interned with Emerge New Mexico and served as a Fellow on Representative Ben Ray Lujan's 2018 congressional campaign.

In addition, Santa Fe Prep senior **Parker Hailey** completed her Senior Internship Project with Think New Mexico in spring 2020.

To learn more about Think New Mexico's Leadership Internship, read bios of past interns, and find out how to apply, please visit: [www.thinknewmexico.org](http://www.thinknewmexico.org).



*Rohan Angadi*



*Daniel Estupiñan*



*Chloe Larkin*



*Kate Monahan*



*Raffaele Moore*



*Ariane Talou*



2019 LEADERSHIP INTERNS

*Connor Schultz,  
Natalie Longmire-Kulis,  
Josue Gandarilla,  
and Rouzi Guo*

## **Board Profile: Notah Begay III**



Notah Begay III started playing golf at age six. That year, Notah's father, who is Navajo, and his mother, who is San Felipe and Isleta pueblo, moved the family into a house near Ladera municipal golf course in Albuquerque. Shortly thereafter, Notah was waking up at 5:00 a.m. to move carts and wash range balls in exchange for practice privileges.

By the time he graduated from Albuquerque Academy, Notah was a top-ranked Junior golfer headed to Stanford University, where he would earn an economics degree. While at Stanford, Notah played alongside teammate Tiger Woods and became a three-time All-American while leading Stanford to the 1994 National Championship. Notah went on to become the only full-blooded Native American to win four times on the PGA Tour.

Public service runs in Notah's family. His grandfather, Notah Begay Sr., was a Navajo code talker during World War II, and his father and brother both served in the Marine Corps. Notah III felt that his calling was to inspire and advocate for Native American youth.

In 2005, Notah launched The Notah Begay III Foundation (NB3F), which has built a comprehensive health and wellness program designed to provide pathways for Native American children to achieve their full potential. NB3F has worked with over 80,000 kids and invested more than \$10,000,000 in Native American communities. This year in response to the devastating impact of Covid-19, NB3F raised over \$400,000 to provide food, water and educational resources to Native American families facing the unprecedented challenge of the health crisis.

In addition to his work at NB3F, Notah provides television commentary for NBC Sports and the Golf Channel. He also started a golf course development firm that works exclusively with Tribal Nations to develop world-class golf properties. And in 2014, Notah was given the rare honor of being inducted into the Stanford Athletic Hall of Fame.

"Having seen what a critical difference public policy can make for the health and welfare of the New Mexico community, I am pleased to begin my service on Think New Mexico's board. Working alongside board members of different political parties and affiliations is an effective way to advance thoughtful policy solutions that improve the quality of life for my fellow New Mexicans," Notah says.

## Statement of Income and Expenditures

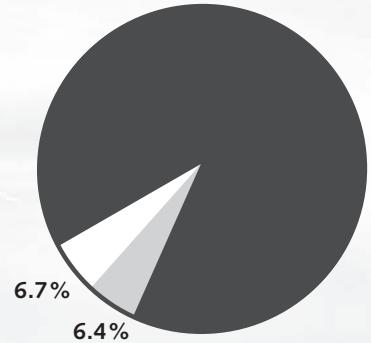
### INCOME

Business Contributions	21,468
Car Donations	100
Endowment/Interest Income	9,222
Foundation Grants	278,950
Individual Contributions	356,010
Sale of Reports & Online Store Items	346
<b>Total Income</b>	<b>\$666,096</b>

### EXPENDITURES

Audit/Accounting	8,892
Benefits: Health, Dental & Disability Insurance	54,119
Benefits: Pension Plan & Fees	32,877
Computer Consulting & Website	6,688
Contract Services	200
Depreciation	275
Donated Real Estate Expenses	13,486
Educational Outreach	7,500
Graphic Design	1,665
Insurance	2,263
Internship Pay	14,238
Investment Management Fees	1,162
Legal Fees	0
Marketing	0
Online Vendor Processing Fee	2,596
Payroll Taxes	25,283
Postage	13,058
Printing & Bulk Copying	45,791
Professional Fundraising	0
Rent/Utilities Expense	30,878
Salaries	321,244
Security/Janitorial	1,116
Stewardship/Board Expenses	244
Supplies	1,789
Telephone & Internet	2,775
Training/Research/Dues	4,740
Travel	0
<b>Total Expenses</b>	<b>\$592,879</b>

## Administrative & Fundraising Expenses as a Percentage of Income: 2019



**Think New Mexico's fundraising expense as a percentage of income in 2019 was 6.7%.**

**Think New Mexico's administrative overhead expense ("management and general") as a percentage of income in 2019 was 6.4%.**

*NOTE: These financial statements do not include in-kind contributions of services or materials from 2019, which were valued at \$12,853. They also do not include unrealized investment appreciation.*



## FINANCIAL SUMMARY

### Year Ended Dec. 31, 2019

#### Balance Sheet

##### ASSETS

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Cash and Cash Equivalents	334,570
Endowment Funds	117,565
Grants Receivable	106,657
Investments	1,140,924
Land held for sale	1,522,734
Prepaid Expenses	0
Property and Equipment*	0

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Total Assets	\$3,276,589
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##### LIABILITIES

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Accounts Payable	9,967
Deferred rental revenue	612

---

Total Liabilities	\$10,579
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##### NET ASSETS

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Without donor restrictions	3,100,495
With donor restrictions	165,515

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Total Net Assets	\$3,266,010
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Total Liabilities and Net Assets	\$3,276,589
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\* Net of Accumulated Depreciation.

Source for pages 20–21: *Financial Statements for the year ended December 31, 2019. Independent auditors: Swain & Grieco, LLC CPA.*

IMAGE: Dorothea Lange. Making adobe bricks for use in construction of a new school building, Bosque Farms, New Mexico, 1935. Courtesy Library of Congress, LC-DIG-FSA-8B27014.

## **FOUNDATION PARTNERS**

( JANUARY 1, 2019—MAY 31, 2020 )

**Abeles Foundation**

**Anchorum St. Vincent**

**Azalea Fund**

**Bingaman Foundation**

**Brillman Fund**

**Brindle Foundation**

**Cabin Fund of the**

**Santa Fe Community Foundation**

**Candelaria Fund**

**Caprock Fund of Tides Foundation**

**Castagnola Family Fund**

**Chamisa Fund**

**Chase Foundation**

**Con Alma Health Foundation**

**Delle Foundation**

**Earth & Sky Fund of the**

**Santa Fe Community Foundation**

**EW Brown Fund**

**Eye Associates Gerald & Alice Rubin**

**Memorial Foundation Fund**

**Feinberg Foundation**

**Foster Foundation Inc.**

**Foundation for Sustainable Living**

**Frost Foundation**

**Gale Family Foundation**

**Garfield Street Foundation**

**Hanna and Matthew Foundation**

**Peter & Maria De Anda Hay Fund of the**

**Santa Fe Community Foundation**

**Hunt Family Foundation**

**Independent Community Foundation, Inc.**

**John H. Hart Foundation**

**Kate Klein Fund of the**

**Santa Fe Community Foundation**

**Kaufmann Fund of The Communities of**

**Coastal Georgia Foundation**

**The Klein Foundation**

**Kuhn Foundation**

**LEF Foundation**

**Louise Arnold Maddux**

**Environmental Foundation**

**SB Foundation**

**Scandia Foundation**

**Second Anonymous Fund of the**

**Santa Fe Community Foundation**

**Simon Charitable Foundation**

**Solis-Cohen Spigel Family Fund**

**Special Relativity Fund of the**

**Santa Fe Community Foundation**

**Thoma Foundation**

**Thornburg Foundation**

**Timken Family Foundation**

**Toan-O'Brien Foundation**

**Doris Goodwin Walbridge Foundation, Inc.**

**Esther & Morton Wohlgemuth Foundation**

## Individual Social Investors (JANUARY 1, 2019–MAY 31, 2020)

Anonymous (12)  
 Kathy & Rick Abeles  
 Paul Abrams  
 Ann N. Aceves  
 Richard M. Adam  
 Jan & Rick Adesso  
 Abigail Adler  
 Dr. Mercedes M. Agogino  
 Omar Ahmed  
 Pamela Saunders Albin  
 Anne Albrink  
 Drs. Joe Alcorn &  
 Sylvia Wittels  
 Richard & Janie Alderman  
 Johnnie R. Aldrich PhD  
 Christian L. Alexander  
 Mark & Martha Alexander  
 Judith & Bill Alger  
 Bill Allen  
 Catherine A. Allen  
 Elizabeth Allred  
 Linda & Carl Alongi



Arthur Alpert  
 Tim & Lucia Amsden  
 Bonnie Anderson  
 Charles & Cheryl Anderson  
 Dave & Maureen Anderson  
 Jean Anderson  
 Lars Anderson  
 The Honorable Phelps Anderson

Maggie & Christian Andersson  
 John F. Andrews & Jan Denton  
 Clara Apodaca  
 Jarratt Applewhite  
 Lynne E. Arany  
 Amber Archer  
 Patricia & Richard Arens  
 Susan Arkell  
 Karyl Ann &  
 Kenneth Armbruster  
 Dale & The Honorable  
 Gail Armstrong  
 Robert G. &  
 Sara Clark Armstrong  
 Roberta Armstrong &  
 Al Webster  
 Scott & Barbara Armstrong  
 Brid Arthur  
 Meleah Artley  
 Michael Aster & Roberta Lurie  
 Ralph Atenasio  
 David & Peggy Ater  
 Rev. Victor Lee Austin  
 Gary Axen  
 Cecilia Baca  
 Jacqueline Baca  
 M. Carlota Baca PhD  
 Drs. Sally Bachofer &  
 Margaret Vining  
 Robert "Cid" & Betty Backer  
 Stephen Badger  
 Burck & Sandra Bailey  
 Joseph Baillio  
 Drs. Rebecca & Brant Bair  
 Ed & Kiyomi Baird  
 Janice Baker  
 Carl & Penny Baldwin  
 Lee Balick  
 Carol & John Balkcom  
 Tina L. Bandick  
 Keith Banks

### Think New Mexico's Ranking for Best Advocacy Campaign

Year	Rank
2019	59th
2018	60th
2017	60th
2016	60th
2015	58th
2014	57th
2013	57th
2012	70th

Every year, the University of Pennsylvania publishes a report evaluating over 7,800 think tanks worldwide. Think New Mexico is the only state-based think tank ranked in the top 100 in the world.

Leslie & Rutgers Barclay  
 The Honorable Paul Bardacke &  
 Lisa Enfield  
 Cleon & Sharon Krallman Barker  
 Cris & Marilyn Barnes  
 Jon Barr  
 Douglas & Kathleen Barrett  
 Laurie & Thomas Barrow  
 Dan Barsotti  
 Sara & Patrick Bauman  
 Ann & Steve Baumgard  
 John O. Baxter  
 Bill Beagen  
 Richard & Kathy Beal  
 David E. Beavers  
 Mary & Len Beavis

**What's a "Social Investor?"** We call our contributors "social investors" because we believe that nonprofits should be evaluated based on the social return they produce each year. For example, because Think New Mexico's 1999 income was \$109,499, the \$135 million appropriated annually for full-day kindergarten means that our investors continue to receive social dividends of approximately \$1,230 for every \$1 invested in Think New Mexico's initial full-day kindergarten project.

*Featured on these pages are Think New Mexico social investors and friends wearing their Think New Mexico "thinking caps" around the world. Their names and locations are listed on the back inside cover.*



Richard & Sue Bechtold  
 Francoise Becker  
 Steve Becker  
 Anne E. Beckett  
 Noel & Frances Behne  
 Rachel Belash  
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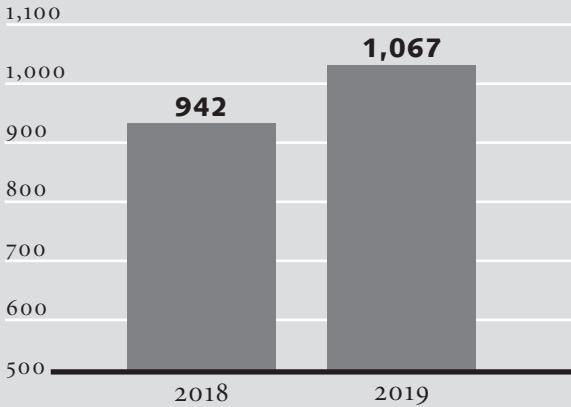
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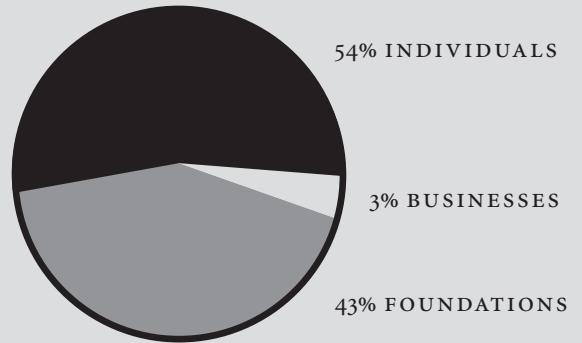
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*“When I came home to find a yellow envelope from Think New Mexico in my mailbox, I felt like a kid looking through the Sears catalog at Thanksgiving. I read it cover to cover and the data is so compelling, the research so thorough, and the conclusions such a ‘no brainer’ that I had to write and say, thank you, Think New Mexico!”* JERRY JONES, SANTA FE, NEW MEXICO, OCTOBER 15, 2019

**The Number of Individual Social Investors in Think New Mexico Grew by More Than 13% from 2018–2019**



**Individual Social Investors Provided the Majority of Think New Mexico's 2019 Revenues**



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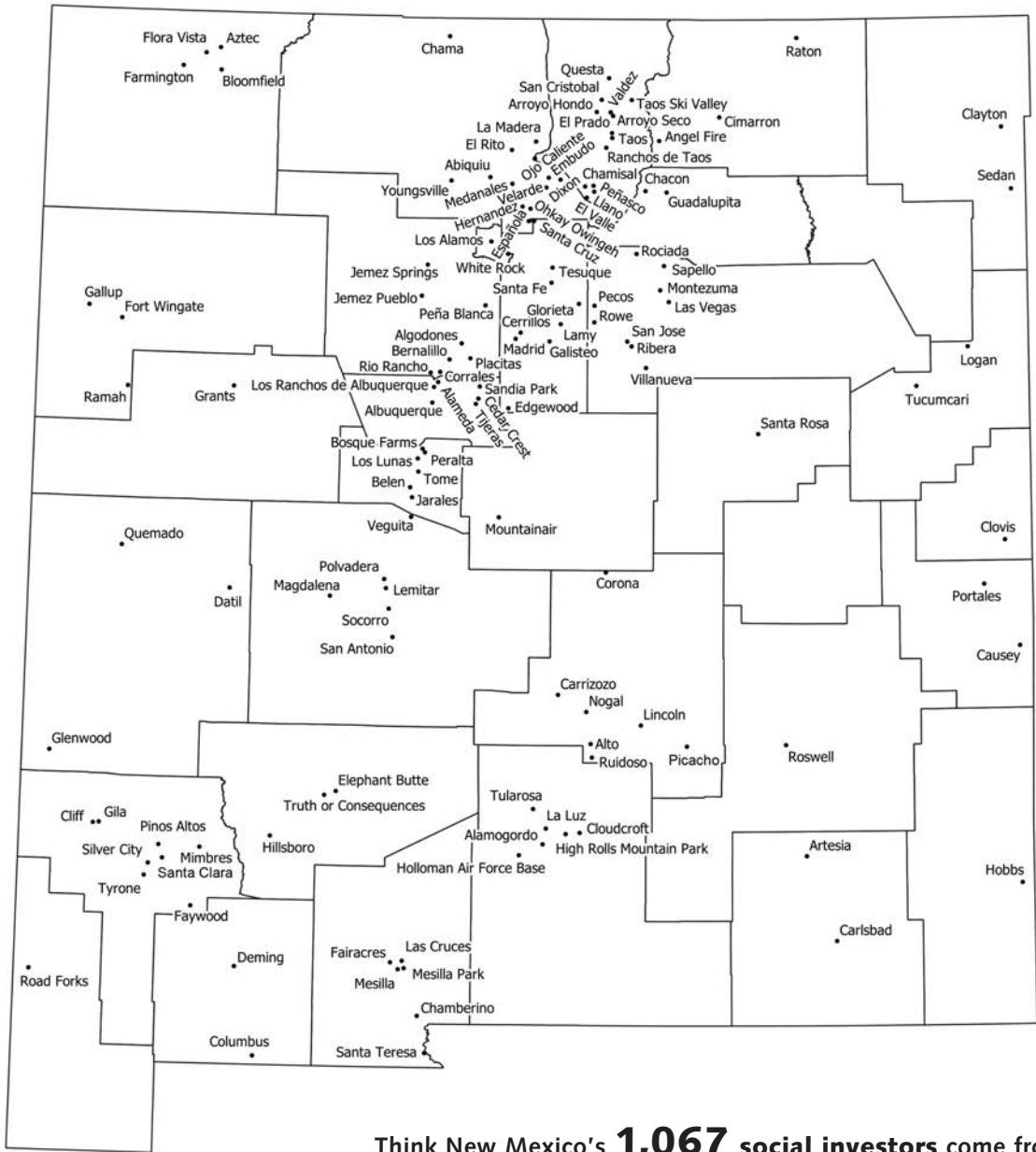
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## LEAVING A LASTING LEGACY: BARBARA MCINTYRE

Barbara McIntyre was one of several key advisors on the business aspects of building Think New Mexico. She moved to New Mexico in the 1990s after a successful career as Vice President of Marketing for Sotheby's in New York City. Barbara was relentlessly upbeat and fun to be around. She was an active hiker, a ski instructor, a Big Sister, and a founding member of the Santa Fe Backgammon Club. She was also a talented photographer and writer, and co-authored *Contemporary Art in New Mexico* and edited *Rio Grande: An Eagle's View*.



Barbara with her faithful hiking companion, Wilson

We were saddened to learn that Barbara passed away in March of 2020, and greatly honored that she chose to make Think New Mexico's work a lasting part of her legacy by including a generous bequest to Think New Mexico in her will. Including Think New Mexico in your estate plans could be thought of as "the secret to eternal life," as your legacy will live on in our work. If you are interested in joining the growing list of people who have made arrangements for leaving a legacy gift to Think New Mexico, please contact us at (505) 992-1315. More information about legacy giving is available on our website.

We extend our sincere thanks to the people listed below, as well as several anonymous donors, who have let us know that they have made provisions for legacy gifts to Think New Mexico:

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## **MANY THANKS TO OUR MONTHLY AMIGOS!**

“Monthly Amigos” make automatic monthly donations to Think New Mexico from their banks or credit cards. The Amigos listed below have signed up to make contributions ranging from \$5–\$300 a month. Their recurring gifts provide Think New Mexico with a steady, predictable income throughout the year. Our Amigos never have to remember to mail us a check! If you’d like to become a Monthly Amigo, you can easily sign up to make a recurring donation on the “Support” page of our website (your donation will be processed through PayPal, and you can change the amount of your donation or cancel it at any time).

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DENISE GIANOPOULOS, ALBUQUERQUE, NEW MEXICO, NOVEMBER 2, 2019

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Think New Mexico's online store has something for everyone, from stickers to tote bags, cell phone cases, notebooks, water bottles, mugs, t-shirts, hoodies, and more! They make great gifts and Think New Mexico gets 10% of the price of anything you buy. You can find the store on our website at: <http://www.thinknewmexico.org/online-store>.

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## **"Thinking Cap" Photos**

PAGE 23: Filmmaker John Sayles and Pio Arevalo, New Mexico

PAGE 24: Leadership Intern Shea Fallick and Zoe Ravina, Loch Raven Reservoir, Baltimore, Maryland;  
Karen Phillips and Elodie Olman, Brooklyn, New York

PAGE 28: Former Representative Brian Moore, Clayton, New Mexico;  
Patrick, Brigid, Stacy, and Danny Quinn at the Hagia Sophia in Istanbul, Turkey

PAGE 31: Kristina G. Fisher, Nambe, New Mexico;  
Leadership Intern Tiffany Cox and her fiancé Kihoon Park, Daedunsan, South Korea

PAGE 32: Martha Ann Sloan and Steve Sloan, Santa Fe, New Mexico;  
Lee Rand, working from home, Santa Fe, New Mexico

## **Acknowledgments**

We wish to acknowledge the *Albuquerque Journal*, the *Associated Press*, the *Las Cruces Sun-News*, the *Los Alamos Monitor*, the *Ruidoso News*, the *Santa Fe New Mexican*, the *Santa Fe Reporter*, syndicated columnist Tom McDonald, cartoonist John Trever, and Alex Candelaria Sedillos for allowing us to reprint the excerpts of articles, editorials, cartoons, and photographs that appear in this annual report. The photo on page 33 was taken by Russell Lee in Chamisal, NM in 1940 and is reprinted courtesy of the Library of Congress, Prints and Photographs Division (LC-USF 33-012802-M1). Background images on pages 22–36 are by Kristina G. Fisher of locations throughout New Mexico. Permission to reprint does not imply endorsement.

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EVER HAS.

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