

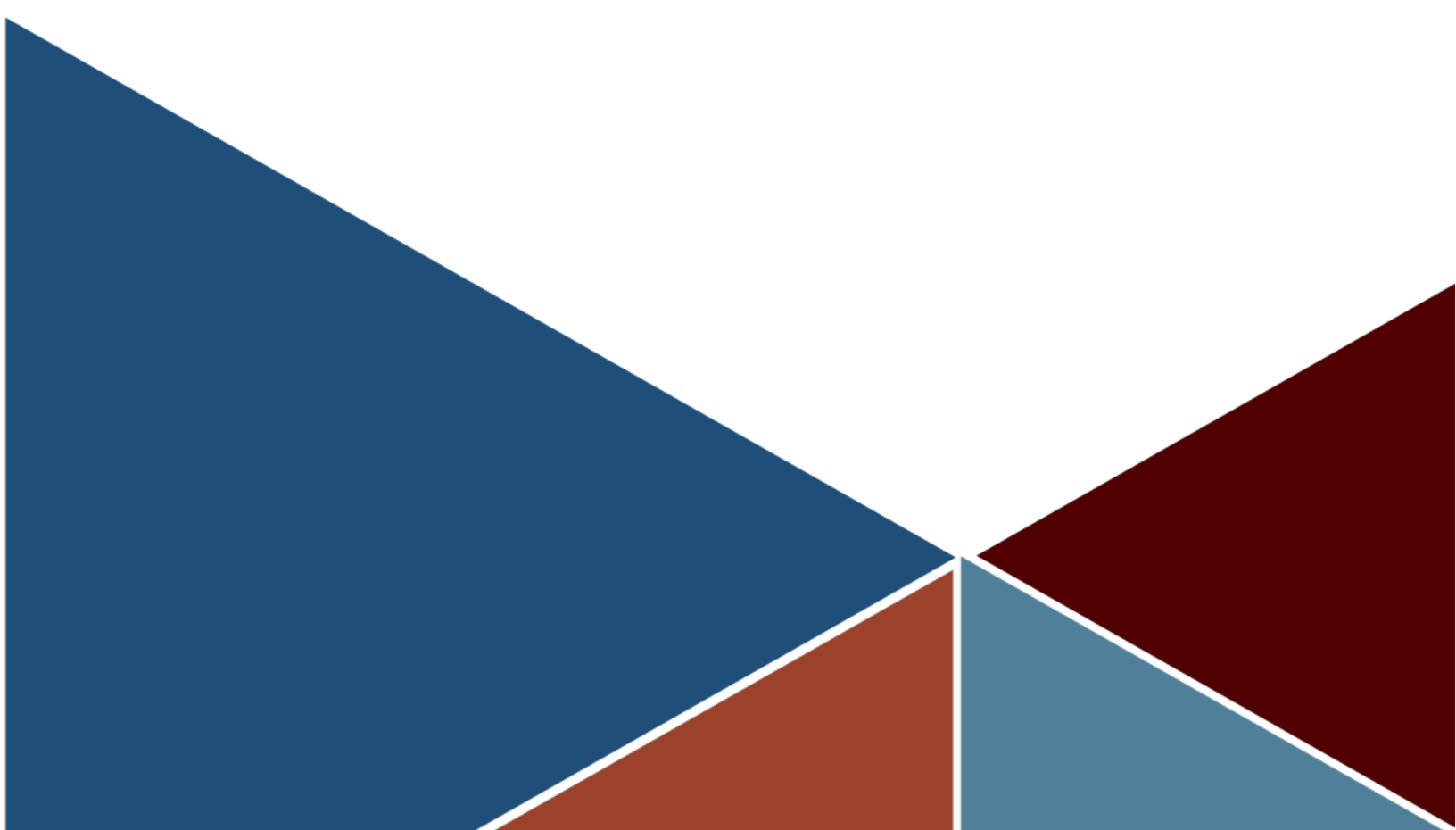


**Center for
Nonprofits & Philanthropy**
THE BUSH SCHOOL • TEXAS A&M UNIVERSITY

Triad National Security, LLC Community Investment Impact Report

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About the Center for Nonprofits and Philanthropy

The Center for Nonprofits and Philanthropy (CNP) supports a vibrant nonprofit and philanthropic sector in Texas and beyond, through high-quality research, professional outreach, and engaged learning.

Nonprofit and philanthropic organizations are the backbone of healthy and vibrant communities. Echoing President Bush's "thousand points of light," local communities are strengthened by a voluntary sector that facilitates community engagement, supports giving and volunteering, and fosters social innovation and entrepreneurship. The Center for Nonprofits and Philanthropy works to build capacity, disseminate knowledge, and prepare students in regard to nonprofit and philanthropic organizations and the collaborative systems in which they operate.

Overall Strategic Priorities

- Prepare leaders to have impact society through high-quality education
- Strengthen organizations and support social sector ecosystem
- Improve understanding and scholarship of the nonprofit sector
- Build and sustain a Legacy Center

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Executive Summary

This report summarizes current philanthropic contributions of Triad National Security, LLC through its Community Commitment Plan. Since 2019, Triad invested over \$10 million in the region as part of the Laboratory's community work in education, economic diversity, and community giving. The Community Partnership Office administers philanthropic investments and staff specialize in the priority areas to coordinate with other programs within the lab and in the community.

The staff at the Center for Nonprofits and Philanthropy reviewed documentation and reports from funded partners and the community partnership office. In addition, center staff conducted interviews with LANL staff, partner organization staff, and regional experts.

The Community Commitment Plan specifies a commitment to partnering with the community and identifies three priority areas: Education, Economic Diversity, and Philanthropy.

Philanthropic investments in **education** are primarily allocated to the Los Alamos National Lab Foundation (LANLF), which is an independent 501(c)3 nonprofit foundation established in 1997 to supplement the educational programs of school districts in counties near Los Alamos National Laboratory (LANL). The Community Partnership Office has invested (2019–2022) almost \$2.6 million with the Los Alamos National Lab Foundation (LANLF), with an average investment of \$650,000 annually. The annual investment from Triad National Security is allocated across three main areas: Scholarships, Career Pathways, and Growing and Supporting Teachers.

Consistent and significant support for LANLF programs has created a strong partnership that enables the foundation to explore creative solutions to complex problems. The aligned and coordinated work that the LANLF is able to carry out in these areas creates value for the region and has the potential to achieve broader impacts. The engagement of Triad employees in scholarship funding and allocation is a significant and robust partnership that enables scholarships to be distributed in an equitable manner supported by a volunteer committee. Furthermore, volunteer engagement through the committee is a meaningful and significant interest of Triad employees.

Philanthropic invest in **economic diversity** is primarily allocated to the Regional Development Corporation (RDC). This support and partnership with RDC is long-standing and predates Triad National Security. The portion of the \$2.6 million invested by the Community Partnership Office (average annual investment of \$650,000) in RDC represents about 60% of RDC's annual revenue. RDC has invested these funds in two primary ways: Technical Assistance to small and micro businesses, which includes small grants and/or loans to businesses and Workforce Education, which includes internship programs.

Working with RDC extends Triad's investment to a number of small businesses that would be difficult to reach without this partnership. RDC works with students and business leaders that might not be reached without this investment. The small business grants result in quantifiable benefits to the small businesses and the region. In addition, Workforce Education initiatives provide support to regional

educational institutions that enhances their ability to serve students. The workforce and academic network was successful through Triad investment to secure subsequent funding.

Philanthropy and Community Investments is the third area of major investment by Triad Corporation. Investments in the philanthropy and community investment operate in three general areas: matching employee giving, about \$600,000 annually; a small grants program in the amount of about \$200,000 annually; and, modest investment (approximately \$100,000 annually) in the Northern New Mexico United Way.

Investments in philanthropy and community distribute funds broadly through employee matching and the small grants program. Providing a vehicle for responsive philanthropy is an important part of the philanthropic portfolio. There might be some opportunity to further standardize decision-making processes for small grants across subareas. New leadership at the United Way of Northern New Mexico suggests a potential for strengthening partnerships, especially related to philanthropic giving for employees and subcontractors.

Current allocation patterns achieve three objectives

- Creates strong community partnerships
- Balances multiple interests, stakeholders, and overall public relations across a range of community needs
- Provides cost effective allocation of large number of small grants

There are several considerations regarding corporate philanthropic investments within the context of Northern New Mexico. There are inevitably a number of viable investment options available to TRIAD National Security, which could result in impact. As a large corporation in a rural region, TRIAD has a unique responsibility to the regional community. The effect of operations at the lab are relevant to a broad array of stakeholders, and managing public relations is a key consideration. Similarly, corporate and strategic imperatives of the lab (i.e., retaining and acquiring a talented workforce) are potentially aligned to philanthropic investment options. Triad is in a good position to consider investment opportunities and priorities. Prior work has developed strong partnerships and reflected a solid commitment to regional growth and development. Some options for additional investment include:

- Enhanced coordinated among LANL community activities
- Strengthen employee community engagement
- Working with and supporting other collective impact models in the region
- Supporting the capacity of an additional infrastructure organization

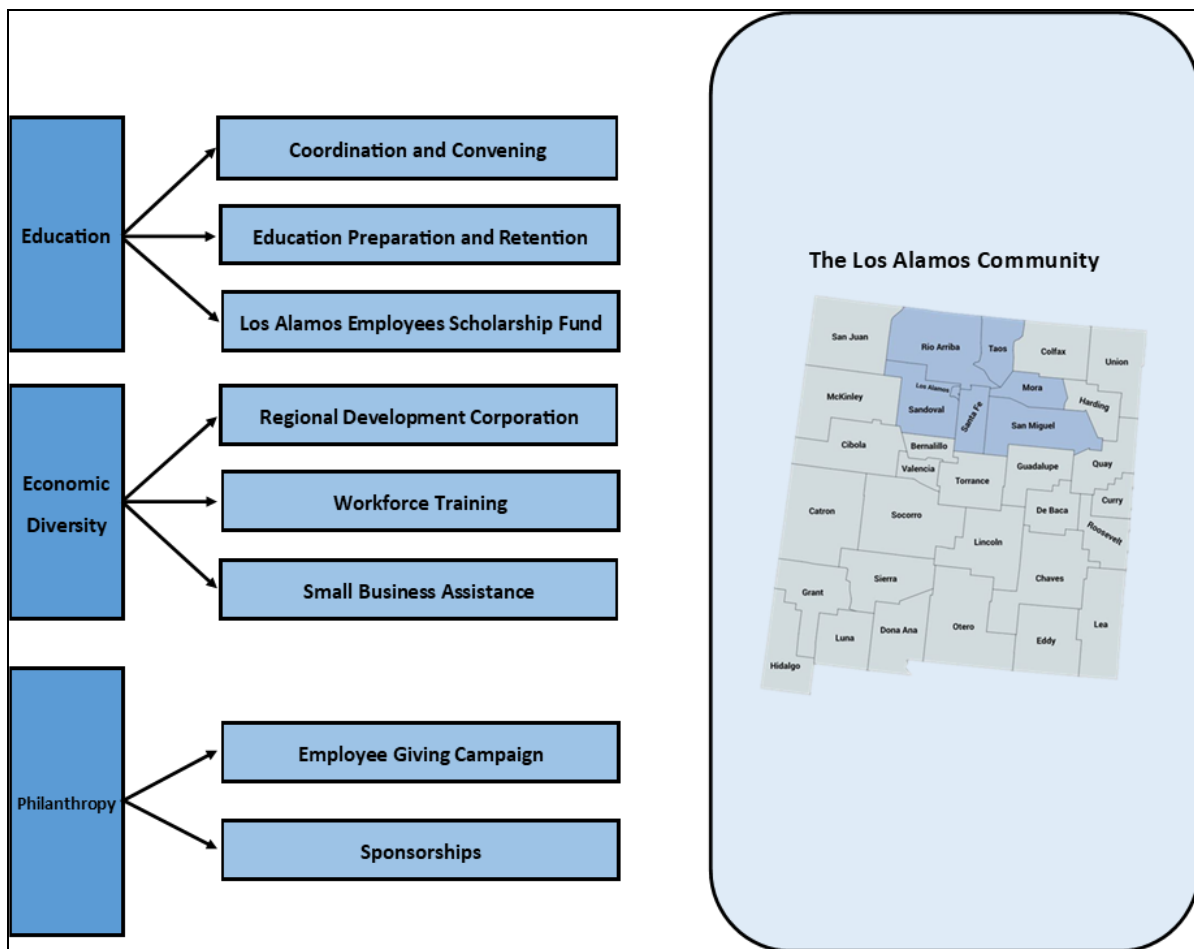
Each of the investment opportunities outlined in the report would benefit from additional study. Triad could develop a more robust community investment plan that outlines a nuanced and multifaceted approach to community impact. Such a plan would consider how aligned activities of the lab might work with employee engagement opportunities and how those are supported through philanthropic investments.

Introduction

This report focuses on philanthropic contributions of Triad National Security, LLC, through its Community Commitment Plan. In 2021, Triad invested \$2.5 million in the seven county northern New Mexico region as part of the Laboratory's community work in education, economic diversity, and community giving. The Community Partnerships Office administers and oversees these contributions. This report prepared by the Center for Nonprofits & Philanthropy at Texas A&M University describes current community investments and proposes areas of investment and partnership that have the potential to improve the quality of life and economic well-being of Northern New Mexico communities.

Triad National Security, LLC, has made annual philanthropic monetary contributions to organizations in surrounding communities to improve quality of life since 2019. These investments are guided by a Community Commitment Plan, which specifies a commitment to partnering with the community and identifies three priority areas: Education, Economic Diversity, and Philanthropy (see Figure 1).

Figure 1 Triad Community Commitment Plan



The education area, described as a foundational component of the plan, proposes three approaches: coordination and convening, education preparation and retention, and the Los Alamos Employee Scholarship Fund. The plan also identified Los Alamos National Lab Foundation (LANLF) as a primary partner to help work on these areas. Economic Diversity was identified as the second priority and specified partnerships with the Regional Development Corporation (RDC) and their small business assistance program and workforce training. The third area of investment was described as Philanthropy and included matching employee giving and allocation of modest “sponsorships.”

This evaluation focuses on current philanthropic contributions of Triad National Security, LLC, through its Community Commitment Plan (\$2.5 million in 2021). It became apparent early in the process that there were a number of aligned and parallel investments and activities, operating within the lab as well as activities of partner organizations that fell outside the primary focus of the evaluation. These aligned activities, however, represent potential opportunities of coordination, alignment, and further research.

Approach/Methodology

The staff at the Center for Nonprofits and Philanthropy reviewed documentation and reports from funded partners and the community partnership office; they also conducted numerous interviews with LANL staff and partner organization staff. Reports from partner organizations contained highly relevant information but lacked consistency in format over time and among grantees. Some reports provided more detail and quantification, while others tended to be more narrative. Reports in recent years (2021) provide more detailed specification of investment outcomes. We conducted interviews with regional experts in philanthropy and community services as well as we conducted site visits with the partner organizations to better understand services and programs. All interviews were recorded and transcribed. That information was compiled and used to inform the report.

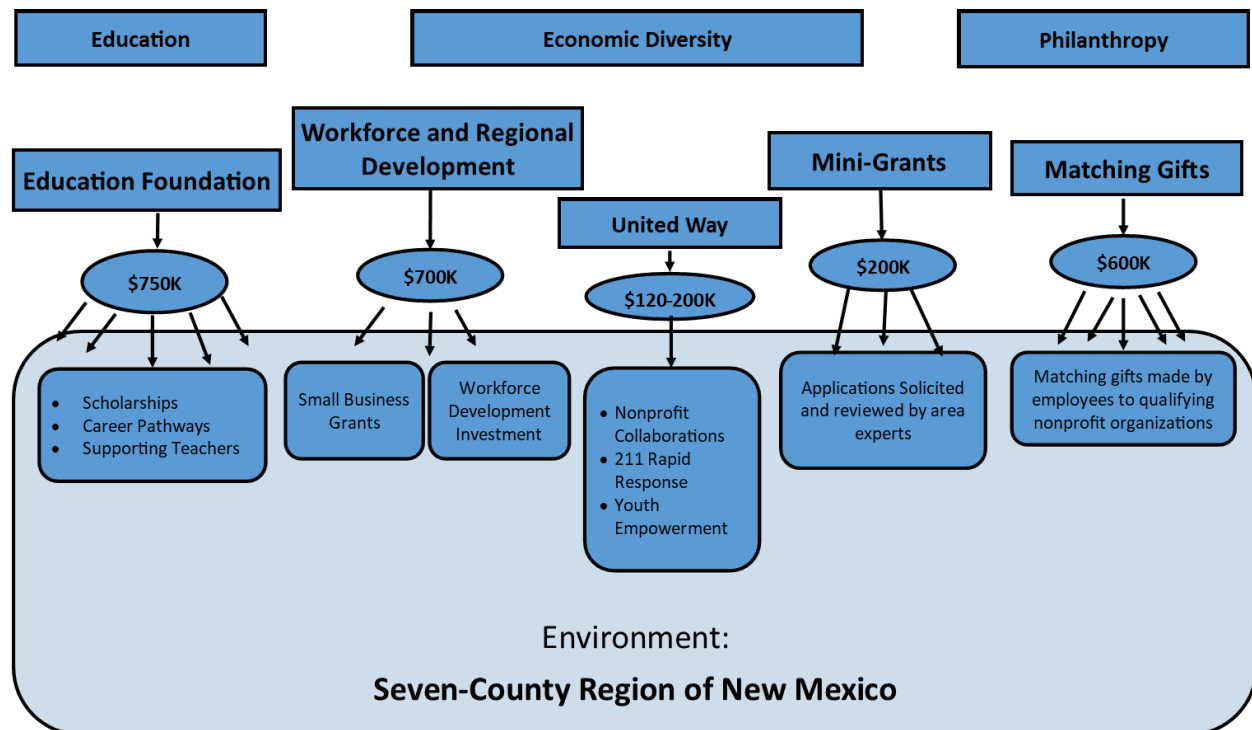
It is important to note the effects of COVID 19 on the practices of partner organizations and region. During a nearly two-year period, program operations were interrupted by the global pandemic. The partner organizations continued to operate but often shifted practices to address immediate and pressing needs of businesses, nonprofits, and community members. Furthermore, these organizations were and remain reliant on community partnerships and coalitions that adapted to the virtual context.

Current Practices to Distribute Philanthropic Funds

The Community Partnership Office administers philanthropic investments. Select staff members specialize in the priority areas and coordinate with other staff members and partner both within the lab and in the community. Overall staffing seems adequate for the philanthropic investment process. The investment process is supported through a third-party grant management system that facilitates employee matching and sponsorship requests. This system eases grant administration challenges and facilitates accurate tracking on an extensive number of small- and modest-sized investments (e.g., employee giving). Staff exhibited strong content area expertise and reflected a high commitment to the region with desire to coordinate activities with partner entities. Figure 2 provides more detail on allocations across the three priority areas and specifies project areas related to each investment. These annual allocations remained fairly consistent over the five-year period as did most project activities. There was some variation and shifting of program activities, and these are discussed in the related section.

Mapping of Existing Community Impact

Figure 2 Mapping Philanthropic Investments



Major Areas of Investment

The report details investments across the three areas and summaries to the extent possible the impact of those funds on the region and partner organizations. Reports and data currently available primarily detail the nature of investments.

Education

Triad National Security philanthropic investments in education are primarily allocated to the Los Alamos National Lab Foundation (LANLF), which is an independent 501(c)3 nonprofit foundation established in 1997 to supplement the educational programs of school districts in counties near Los Alamos National Laboratory (LANL). The Community Partnership Office has invested (2019–2022) almost \$2.6 million with the Los Alamos National Lab Foundation (LANLF), with an average investment of \$650,000 annually. LANLF was established in 1997 through the coordinated effort of management at Los Alamos National Laboratory (LANL), the University of California (UC) System, the Department of Energy (DOE), Los Alamos Public Schools, and the New Mexico congressional delegation. Since its inception, LANLF has continued to grow and develop a range of programs, including several regional coalitions and expanded grantmaking for the region. The annual investment from Triad National Security is allocated across three main areas: Scholarships, Career Pathways, and Growing and Supporting teachers.

Scholarships

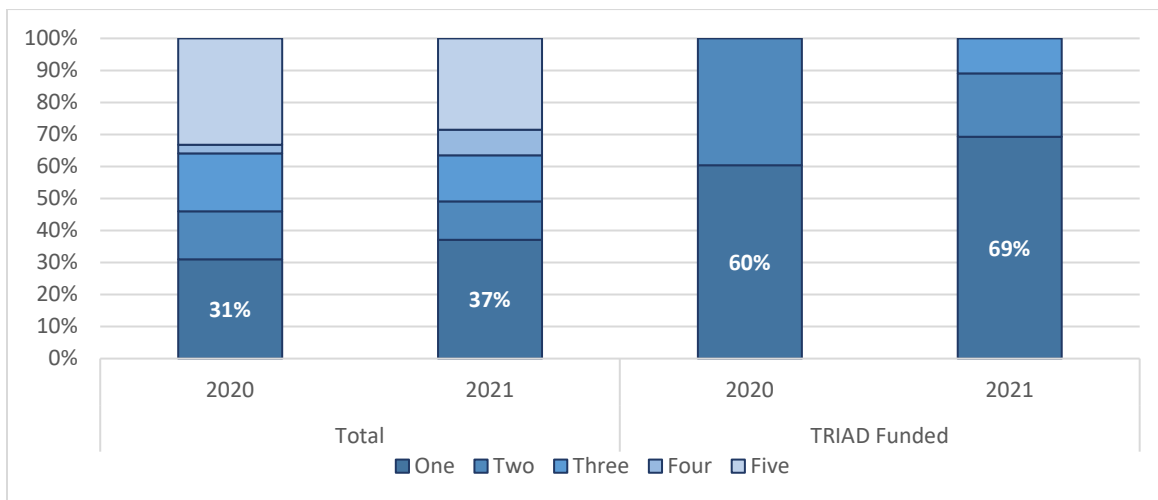
In 2021, Triad invested over \$250,000 in the Scholarship program, which is a long-standing initiative of the foundation and the national lab. Overall, scholarships at LANLF are funded through several different sources including philanthropic allocations from Triad National Security, employee giving, and LANLF funds often raised for the purpose of regional scholarships. Regional area funders also contribute to scholarships administered through a common process. Fund sources have particular criteria or priorities (e.g., healthcare, regional) regarding fund allocation to grantees. This results in a fairly complex mix of potential recipients and decision criteria (STEM focus, financial need, etc.) for scholarship allocation. Potential scholarship recipients are recruited through long-standing partnerships with regional schools. A panel of volunteers from the National Lab are responsible for reviewing applications and ranking potential recipients based on selected criteria relevant to the funding source. This process is managed by LANLF and funded through Triad Philanthropy.

Triad invests in two scholarship areas: four-year college scholarships and career pathway scholarships (i.e., technical school, usually 1–2 years). Annually, ten \$10,000 scholarships (\$2500/year for four years) are allocated to students with financial need who demonstrate strong leadership in their schools and communities to attend 4-year college to earn a degree. Of the scholarships awarded in 2019, 9 of 10 students are on track to graduate in spring of 2023 and are in good standing. One student is deferring

one year (enrolled less than full time to help support family). Of the 40 scholarships allocated since 2019, 38 of 40 students are in good standing. Fifty percent of scholarships are awarded for in-state schools. Out-of-state schools are primarily private, selective institutions including Brown, Stanford, Smith, St. Edwards, University of Denver, and University of Portland. At three state institutions with larger enrollments (University of New Mexico, New Mexico State, and Santa Fe Community College), Triad has funded the “LANL Scholar Ambassador Program,” which pays a student employee to connect with scholar recipients. The LANL Scholar program provides support to scholarship recipients, serves as liaison to the University, and builds a sense of community among scholar recipients. Two 2019 scholarship recipients (both Native American females) are currently serving as LANL Scholar Ambassadors at University of New Mexico and New Mexico State University supporting incoming and transfer students.

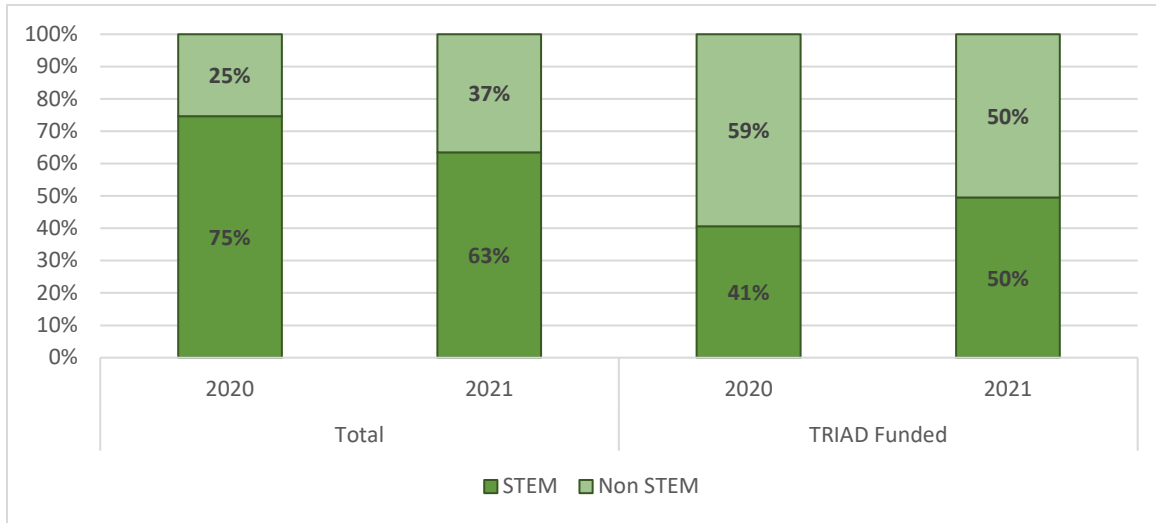
As noted, the LANL Education Foundation administers a number of scholarship funds including Triad philanthropic funds, LANL employee funds, regional donor funds, and peer foundations that have found the burden of scholarship administration is more effectively coordinated through a common process. Overall, the education foundation allocated 105 four-year college scholarships in 2021 for a total of \$750,000. Comparing Triad philanthropic scholarships to the overall profile of scholarships shows that Triad scholarships are allocated exclusively to those with the most significant economic needs (see Figure 3) compared to roughly 50% of the overall scholarship allocations that prioritize financial need (1 and 2 on a 5-point scale, where the lower score reflects more financial need). This emphasis on financial need has inspired other funds and LANL employees to consider needs-based scholarship criteria in their allocation decisions.

Figure 3 Percent of Scholarship Funding by Financial Need



Regarding area of study, currently about 50% of the Triad scholarships are focused on STEM fields, whereas the overall scholarship allocations show about 70% given in STEM fields (see Figure 4).

Figure 4 Percent of Funding for STEM or Non-STEM Studies



Triad Philanthropy has allocated approximately \$54,000 a year since 2019 toward Career Pathway Scholarships. Scholars are awarded \$750 a semester for up to four semesters (\$3000 maximum award), based on the number of semesters remaining to earn an Associate’s degree or certification. The majority of recipients are pursuing degrees and certificates in healthcare fields (nursing, dental assisting, allied health). Nearly all recipients attend one of the in-state community colleges or branch campuses. Triad supports allows scholarships to be automatically renewed for a second year. Students do not have to reapply; they just demonstrate that they are persisting and making progress toward completion. LANL employees also contribute generously to the Career Pathways Scholarship Fund.

Career Pathways

In 2021, Triad Community Philanthropy allocated a little over \$250,000 toward Career Pathway work of the foundation. Career pathway work can take a variety of different forms, but the foundation is seeking to serve as a facilitator and convener to help align technical and career opportunities for students. A signature program is Career, College, and Community Pathways (C3P). C3P is a multifaceted initiative of the foundation that links several regional partners including the Regional Development Corporation as well as K-12 school systems and higher education institutions. LANLF is particularly interested in K-12 efforts to better integrate secondary education programs and link those to career and technical training and support. Their approach is to shift educational systems in secondary education. This is an ambitious initiative but if successful, even with a modest number of regional school districts, could substantively change educational outcomes and employment opportunities for hundreds of kids. Initial work in this area is promising and given the substantive investment through a multistakeholder alliance, Triad’s investment in this area could generate substantive impact. This also highlights the importance of

alignment and coordination among other pathway initiatives of the lab. As this work grows, the importance of the lab as a career partner, through internships for instance, is vital.

Supporting and Growing Teachers

Supporting and Growing Teachers is a long-standing initiative of the foundation and national lab. This program area has taken a variety of forms at the foundation and continues to evolve. There is parallel work ongoing with Triad's investment in the Math and Science Academy through the Community Partnership Office. In 2021, Triad Philanthropy allocated a little over \$150,000 to work with the LANLF in two main areas helping teachers to become National Board Certified and supporting Native American teachers and counselors. Both of these initiatives are ongoing and have resulted in modest improvements for individual teachers. For instance, in 2021, LANLF recruited and supported 22 experienced teachers to pursue their National Boards Certification. Fourteen of those teachers were a part of the New Mexico Public Education National Board scholarship program, and nine were fully supported by Triad. LANLF supports teachers and seeks to retain teachers in the program, which is rigorous. Nevertheless, five teachers withdrew from the National Boards process. Achieving broader and systematic improvements remains elusive, partially due to challenges related to working with regional schools and district and general teacher turnover.

As noted, there are a number of parallel and ongoing efforts operating within the LANLF that align with the Triad philanthropic investments, such as a pilot project that provided Trauma-Informed Instruction at five Espanola elementary schools. Furthermore, the LANLF published a report to provide recommendations for recruiting and retaining teachers in Northern New Mexico. Some of these recommendations operate outside the school districts themselves (i.e., teacher preparation), but predominately these recommendations are reliant on the school districts (teacher pay) and school leadership. LANLF has investigated and explored a number of options and potentially through the coalition work and continued support from Triad more substantive improvements can be achieved.

Summary

Consistent and significant support for LANLF programs has created a strong partnership that enables the foundation to explore creative solutions to complex problems. The aligned and coordinated work that the LANLF is able to carry out in these areas creates value for the region and has the potential to achieve broader impacts. The engagement of Triad employees in scholarship funding and allocation is a significant and robust partnership that enables scholarships to be distributed in an equitable manner, supported by a volunteer committee. Furthermore, volunteer engagement through the committee is a meaningful and significant interest for Triad employees.

There also remains an opportunity to further strengthen the partnership and consider how aligned Triad programs could operate more cooperatively with efforts of the foundation. It is not necessarily clear on what that kind of enhanced coordination might entail, but the current dynamics between the LANLF and Community Partnership Office suggest that further coordination among aligned and parallel activities within the lab and partner organizations might be fruitful. This is reflected as well in the career pathway work that has clearly benefited from strong multi-institutional partnerships, many of which are partially funded by Triad Corporation.

Economic Diversity

Triad National Security, LLC, through its Community Commitment Plan and the coordination of the Community Partnership Office has invested \$2.6 million with the Regional Development Corporation (RDC) with an average investment of \$650,000 annually (for the period of 2019–2022). This support and partnership with RDC is long-standing and predates Triad National Security. Their investment in RDC represents about 60% of RDC’s annual revenue. RDC has invested these funds in two primary ways: Technical Assistance to small businesses and microbusinesses, including small grants and/or loans to businesses and Workforce Education, which includes internship programs.

Technical Assistance and Small Business Grants

Technical Assistance entails One-on-One coaching and consultation as well as small group training that reflects the interests and concerns of regional small businesses. This coaching and consultation often entails helping organizations apply for a small business loan or grant. RDC operates three grant or loan programs: Micro-Grants, Technology and Manufacturing (TEAM) Fund and Tribal Economic Diversity Fund (see Table 1). These grant and loan funds were an initiative through the partnership with Triad National Security in 2019.

Table 1 Summary of Small Business Grants 2019-2022

Year	Count	Micro-Grants	TEAM Fund	Tribal Fund	Total
2019	Grants	5	6	10	21
	Value	\$ 6,682	\$ 109,700	\$ 61,485	\$ 177,867
2020	Grants	14	10	6	30
	Value	\$ 29,673	\$ 141,700	\$ 26,693	\$ 198,066
2021	Grants	48	8	6	62
	Value	\$ 70,323	\$ 116,105	\$ 34,748	\$ 221,176
2022	Grants	48	6	9	63
	Value	\$ 118,550	\$ 92,645	\$ 47,129	\$ 258,324
Total	Grants	115	30	31	176
	Value	\$ 225,228	\$ 460,150	\$ 170,056	\$ 855,434

RDC's Micro-Grant Fund provides a small infusion of capital (\$500–\$3,000) that helps organizations grow and sustain revenue. During the last four years, RDC provided 115 small business grants for a total of \$225,228. In 2021, participants reported that they increased revenue by an average of 20% and were able to secure \$128,000 in additional funding as a result of these grants.

The Technology and Manufacturing (TEAM) Fund offers no-interest loans to manufacturing and technology-based companies. The fund supports growth-oriented companies who are on track to add jobs, grow revenues, and attract additional funding and investment. During the last four years, RDC provided 30 TEAM loans for a total of \$460,150. In 2021, participants reported that they increased revenue by an average of 40% and were able to secure over \$800,000 in additional funding or government assistance as a result of these loans. Participants also reported hiring 13 full-time employees and 5 part-time employees.

Tribal Economic Diversity Fund awards businesses owned by a federally recognized Indian tribe or by an enrolled member(s) of a federally recognized Indian tribe for critical technical services and equipment. Awards are made on a competitive basis and are intended to provide services to tribal business entities so that they may be able to diversify revenue, leverage other investments, create new jobs and/or put systems in place that lead to growth. During the last four-years, RDC provided 31 Tribal Grants for a total of \$170,056.

RDC also conducts about 200 technical assistance sessions annually with business clients. These sessions are personalized to client interests and guided by RDC staff to enhance the capacity of businesses. RDC also hosts or collaborates to provide workshops and events that provide practical training to business leaders. In 2021, they provided educational sessions to over 300 individuals on topics such as business resources, investment fundamentals, and marketing.

Workforce Education

The RDC currently has two initiatives under the Workforce Education: the Workforce and Academic Network Development and the Higher Education Workforce project.

The goal of the **Workforce and Academic Network Development pilot project** is to streamline and align academic and non-academic training programs and services. Working with 30 partner organizations, which include LANLF, regional community colleges, municipalities, public and secondary educators, RDC seeks to identify funding that supports partnering entities in program design and implementation to assist the student/job seeker in Northern New Mexico. This work is leading to a collaborative funding proposal.

The **Higher Education Workforce project** is a partnership between the Regional Development Corporation (RDC) and Northern New Mexico higher education institutions to identify training needs and develop a well-educated workforce in the region. The partnership aims to help Northern New Mexico's businesses find skilled workers and help ensure jobs are filled by in-state and in-county workers who want to stay in their communities after receiving an education at two- and four-year colleges in the area. RDC funds projects at six regional colleges. In 2020, RDC provided over \$160,000 to

these regional colleges to support internships and applied learning opportunities. In 2020, their investment provided support to 63 interns, and approximately 700 individuals received training support.

Summary

Working with RDC extends Triad's investment to a number of small businesses that would be difficult to reach without this partnership. RDC works with students and business leaders that might not be accessed without this investment. The small business grants result in quantifiable benefits to the small businesses and the region. In addition, the workforce education initiatives provide support to regional educational institutions that enhances their ability to serve students. The workforce and academic network was successful through Triad's investment in securing subsequent funding.

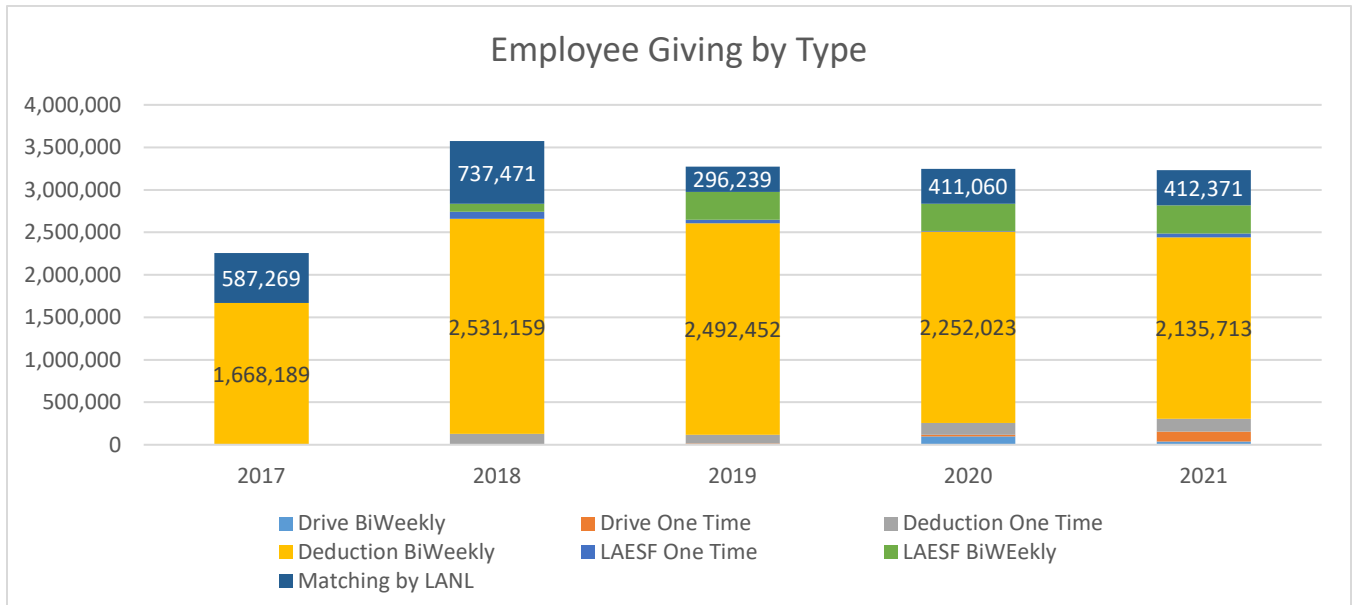
Philanthropy and Community Investments

Philanthropy and Community Investments is the third area of major investment by Triad Corporation. Investments in the philanthropy and community investment operate in three general areas: matching employee giving in the amount about \$600,000 annually; a small grants program in the amount of approximately \$200,000 annually; and modest investment (approximately \$100,000 annually) in the Northern New Mexico United Way. These three investment areas are discussed next.

Employee Giving and Triad Matching to Community Nonprofits

The Office of Community Partnerships administers an online giving portal that facilitates and tracks employee giving. The development and utilization of the system, which is also used to administer small grants and sponsorships, provides an efficient and cost-effective process to allocate a large number of small grants. Employee giving across all methods is about \$2.5 million annually with an additional \$500,000 (approximate annual average) matched annually by Triad Corporation. Employee giving opportunities include fundraising drives (weekly and annual), one-time deduction, biweekly deductions, and the Los Alamos Education Scholarship Fund (one-time and biweekly). Triad matches employee deductions to qualifying nonprofit organizations and the seven regional counties of Northern New Mexico (see Figure 5).

Figure 5 Sum of Payroll Deductions and Matching to Organizations



In 2019 Triad Corporation instituted matching criteria that focused corporate matching on qualifying nonprofits (registered 501(c)3s that are not houses of worship) operating in the seven-county region of Northern New Mexico. The intent was to focus matching funds to nonprofits that are actively serving disadvantaged groups in the region. One way to explore the implications of that policy is consider matching gifts by county (see Figure 6). Los Alamos County is substantively more affluent across a whole range of socioeconomic and health indicators, suggesting that funds allocated to nonprofits outside Los Alamos County might be serving more disadvantaged populations. As reflected in Figure 6, the proportion of matching funds allocated to nonprofits in Los Alamos county decreased, and consequently the proportion of funds provided to other counties increased.

Figure 6 Value of Matching Gifts Made to Eligible Organizations

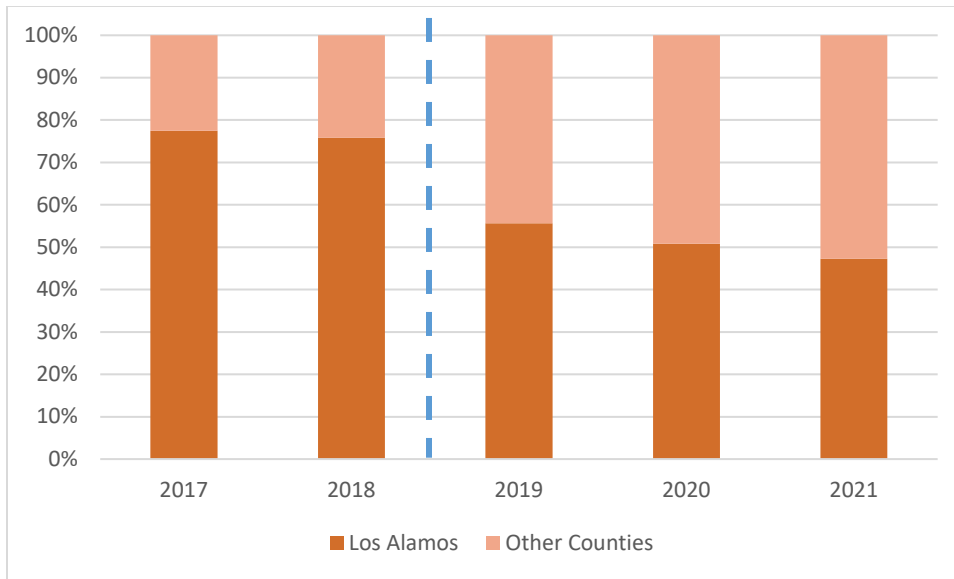


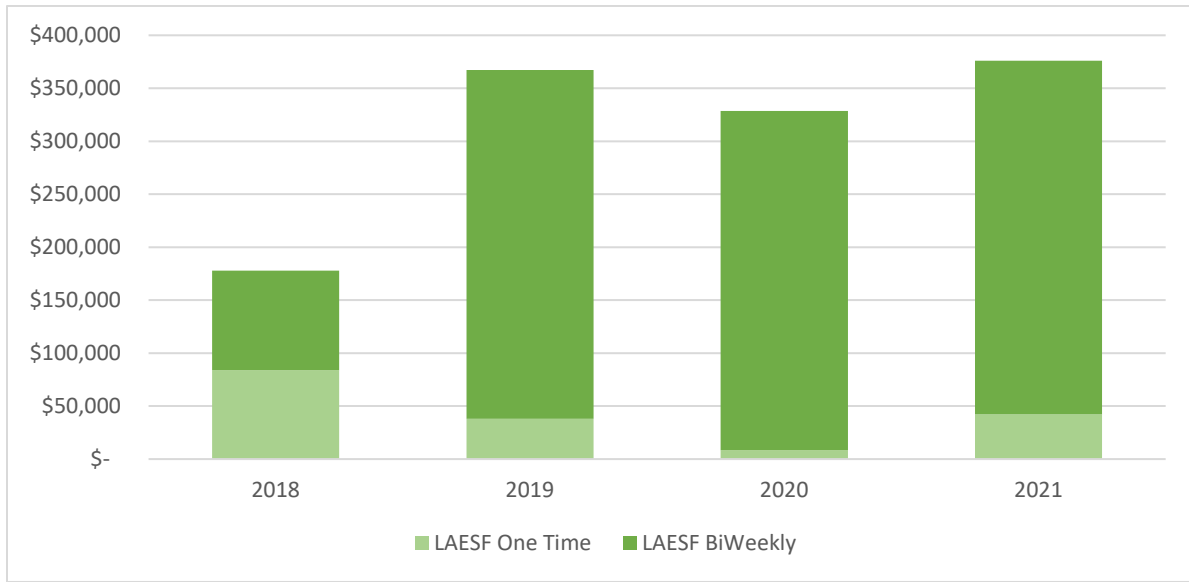
Table 2 details the top 10 recipients of Triad corporate matching funds. United Way receives the most funds; at almost \$400,000, this includes the philanthropic allocations discussed next. The remaining organizations include three faith-based entities, two education-focused groups, and several social service organizations including the humane society.

Table 2 Top 10 Recipients of Triad Matching Over Time (2017–2022)

Organization	Total Matching Funds Received	Number of Matching Donations Received
United Way Of Northern New Mexico – Community Action Fund	\$ 395,357.53	22
Growing Up New Mexico: The Early Childhood Partnership	\$ 110,439.45	23
Food Depot	\$ 89,533.05	20
Crossroads Bible Church Of The Christian And Missionary Alliance	\$ 81,414.17	8
Immaculate Heart Of Mary Catholic Church	\$ 79,197.41	7
Espanola Humane	\$ 70,998.73	20
Los Alamos Public Schools Foundation	\$ 52,646.50	38
Hope Pregnancy Center	\$ 49,645.40	20
Self Help Inc.	\$ 31,039.43	20
Unitarian Church Of Los Alamos	\$ 30,876.54	8

Los Alamos Employee Scholarship Fund (LAESF), since 2019 has received over \$300,000 annually (see Figure 7). The allocation of these funds was discussed earlier in the report.

Figure 7 Employee Giving to Scholarship Funds



Small Grant Program

Small grants and sponsorships are awarded quarterly, and local nonprofits are welcome to apply throughout the year. Small grant awards are limited based on budget available and typically total just over \$200,000 across an average of 76 grants annually. Applications are clustered into four areas: Economic diversity, K-12 STEM education, Workforce development, and Community nonprofit support. Staff specialists in the Office of Community Partnerships reviews applications and award small grants based on eligibility. Staff specialists can work with organizations to assist them in refining applications to better match selection criteria. Table 3 summarizes the top 10 small-grant recipient organizations between 2019 and July 2022. Education and social service organizations are the most common top 10 recipients.

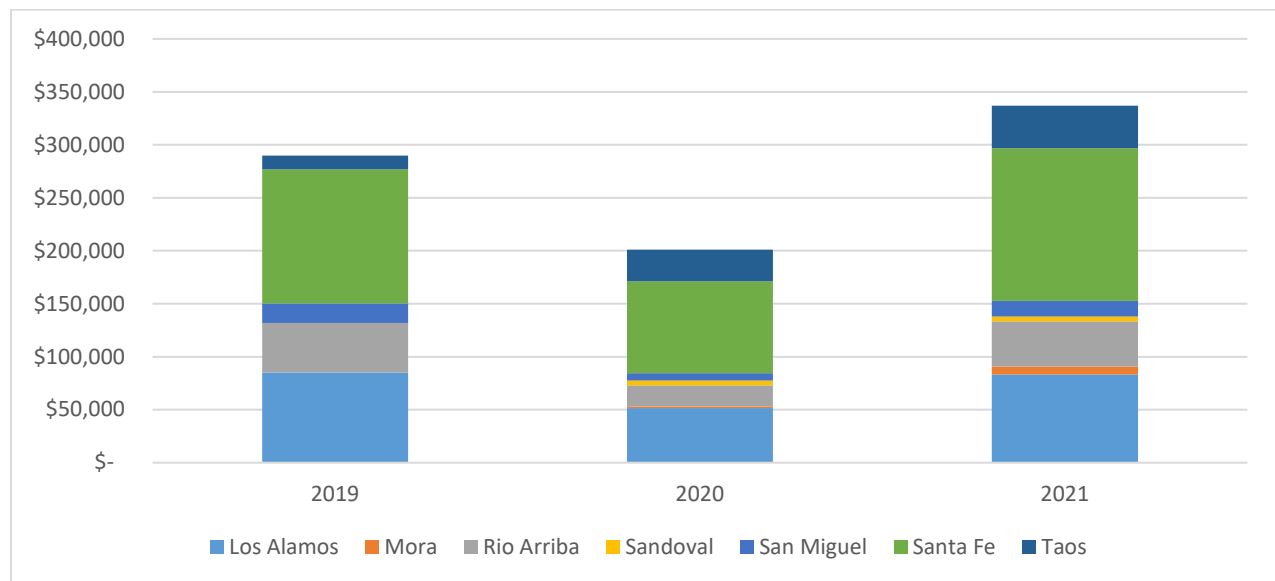
Table 3 Top Ten Small-Grant Recipients 2019–2022

Organization Name	Count	Sum
STEM Santa Fe	6	\$ 72,600
New Mexico Consortium (NMC)	5	\$ 71,470
The Family YMCA	7	\$ 43,500
Los Alamos Institutes	10	\$ 28,400
Food Depot	5	\$ 26,500
University of New Mexico – Taos Branch Campus	4	\$ 26,000
Growing Up New Mexico: The Early Childhood Partnership	4	\$ 24,000
Luna Community College Foundation	3	\$ 23,700
Northern New Mexico College Foundation	5	\$ 23,593
Kitchen Angels Inc.	4	\$ 22,500

*Excludes Los Alamos Laboratory Foundation, Regional Development Corporation, and United Way of Northern New Mexico as partnerships with them are described in more detail in other areas of this report.

Staff specialists in the Community Partnership Office reach out to community partners and encourage applications from across the seven-county region. As reflected in Figure 8, most grants are awarded in Santa Fe and Los Alamos County.

Figure 8 Total Value of Small Grants by County 2019–2021



United Way of Northern New Mexico

United Way of Northern New Mexico is a long-standing partner of the Los Alamos National Lab. Since 2019, support from Triad Philanthropy has averaged about \$150,000 annually. As noted, employee contributions and match support are provided in addition to these philanthropic funds. Funds have been used to support the development of regional booklets and information referrals to nonprofits in Northern New Mexico. These resource books are made available to regional first responders, schools, etc. to help potential beneficiaries connect to local nonprofits. The United Way also provides modest capacity support to regional nonprofits through training programs and regional partnerships. United Way works to create a culture of philanthropy in Los Alamos through community events. United Way also works with National Lab subcontractors to provide philanthropic investments in the region.

Summary

Investments in the philanthropy and community distribute funds broadly through employee matching and small-grants programs. Providing a vehicle for responsive philanthropy is an important part of the philanthropic portfolio. There might be some opportunity to further standardize decision-making processes for small grants across subareas. In addition, new leadership at the United Way of Northern New Mexico suggests a potential for strengthening partnerships especially in regard to philanthropic giving for employees and subcontractors.

Conclusions

Strong Community Partnerships

A reoccurring theme in conversations with Community Partnership staff and community partners is that area experts who oversee educational programs, economic development, and community philanthropy exhibit significant understanding and strong relationships with a diverse range of community-based organizations. This includes regional schools, institutions of higher education, and a variety of nonprofits. This orientation toward long-term relationship building is key to a successful philanthropy initiative and acknowledges the investment by Triad to build strong partnerships through long-term investments and the ability to retain and hire individuals that understand the regional community.

Current Allocation Patterns Balance Multiple Interests, Stakeholders, and Overall Public Relations

The range of investments acknowledge multiple and varied interests of community partners, regional stakeholders, Lab employees, and corporate interests of the lab. This investment approach uses multiple outlets and venues to share assets with various community stakeholders. There are both guided partnerships that use local knowledge to reinvest philanthropic dollars, and simultaneously, the lab responds to employee preferences and receives requests for small-grant allocations. It does consequently make determination of impact difficult to quantify objectively. Small- and modest-size allocations distributed broadly potentially impact a large number of interests.

Relatively Cost-effective Allocation of a Large Number of Small Grants

Distributing a large number of small grants can be labor intensive. The lab has utilized an online grant management system that tracks employee gifts and facilitates matching gifts. Furthermore, the small grants program utilizes the same system to gather funding requests, which facilitates review by area experts (community partnership staff). Regarding scholarships, the LANL foundation utilizes lab employees as part of the selection committee. Those community members review and rank applications and guide disbursement. Small grants and loans to businesses are administered by the Regional Development Corporation (RDC), and although these grants are labor intensive, the RDC provides a high-touch experience for small- and micro-businesses in the region.

Community Needs are Extensive and Diverse

It is widely recognized that the region reflects significant disparities in health, education, and wealth. The nature and character of these concerns are complex and interconnected. There are a number of viable community partners, but the capacity of public and nonprofit providers in outlying areas are often less resilient and reliable, certainly in respect to the various and complex needs in the region.

Long-term Investment Strategy

To provide guidance on investment approaches, the TAMU Center for Nonprofits and Philanthropy staff reviewed existing literature and reports relevant to investment approaches, giving special attention to Corporate and Strategic Philanthropy methods. Furthermore, we carried out a number of interviews with regional philanthropy experts, national program models, and lab staff members with the intention of learning viable alternatives regarding philanthropic investments in the region.

There are several considerations regarding corporate philanthropic investments within the context of Northern New Mexico. There are inevitably a number of viable investment options available to TRIAD National Security, which could result in impact. The board has a number of key considerations that might guide investment options. As a large corporation in a rural region, TRIAD has a unique responsibility to the regional community. The effect of operations at the lab are relevant to a broad array of stakeholders and managing public relations is a key consideration. Similarly, corporate and strategic imperatives of the lab (i.e., retaining and acquiring talented workforce) are potentially aligned to philanthropic investment options.

Determination of impact itself is a tricky endeavor. One can consider the impact of investments on individuals, vs impact on institutional actors, to community- or system-level impacts. It is important to recognize that impact investing necessitates choice among viable alternatives and that selection of choice options likely excludes potentially viable alternatives. Furthermore, any particular approach is not a guarantee of success. Many apparently viable investment approaches fail to gain the promised outcomes. Given historical context and the inherent power differential between the lab and community members, it is important to consider historically underrepresented groups and provide opportunities to understand regional interests and concerns. Statistics clearly show the disparity between Los Alamos County and all other surrounding areas.

The current community investment plan does not specify intended measures of success. The specification of performance metrics and investment goals might provide additional guidance to Triad staff. Engaging stakeholder perspectives relevant to specific investment priorities is important, and the board should specify investment area priorities. This could entail affirming the current investment approach and asking Community Partnership staff to work with constituents on determining relevant performance metrics.

Investment Alternatives and Priorities

Triad is in a good position to consider investment opportunities and priorities. Prior work has developed strong partnerships and reflected a solid commitment to regional growth and development. Considering carefully the next steps in philanthropic work is appropriate. Similarly, continued work to understand investment outcomes is appropriate. It is also important to recognize that collaborative and collective processes are difficult and time-consuming but can contribute to long-standing resilience among key partners. Balancing the interests of Triad Corporation, lab employees and community is difficult. Efforts to listen to the community and address pressing regional concerns was acknowledged and appreciated by partners. Determination of impact priorities will enable staff and partner organizations to orient work toward those objectives. The following is a list of potential investment priorities and/or strategies Triad may consider.

Coordinated LANL Community Activities

As noted, there are at times multiple and parallel activities of the lab and partner organizations that could continue to be aligned. There might be some value to being slightly more coordinated and systematic among LANL and partner initiatives. It is also recognized that increased coordination and administration adds costs. LANL Foundation is undergoing efforts with respect to Career Pathways for instance, and Triad should remain an active and viable partner both in terms of philanthropic support but in terms of employment and recruiting for staff to work at the lab. Aligning regional recruiting and support activities with philanthropic partners and investments is likely to benefit the region and the Lab.

Educational programs and activities as well reflect another opportunity to consider enhanced coordination and alignment. Legacy programs at the Lab (i.e., Math and Science Academy) and the LANLF (Inquiry Science Education Consortium) might benefit for realignment and reconsideration. Although neither of these programs was the focus of this review, the nature and character of those programs might benefit from further coordination with community-based activities of the Lab.

Employee Community Engagement

There are a number of opportunities to further enrich and strengthen employee engagement in the community. The strengths of the scholarship program reflect the potential to engage employees in supporting and guiding investments. This could take a variety of forms and would require additional

investment, as these programs reflect broader attitudes and organizational culture. One venue to consider is ensuring that supervisors are aware of the opportunities for employee engagement in the community and actively support programs that allow the employee to connect with the community.

Collective Impact Models

There are a couple of collective impact models operating in the region. Collective impact is a set of strategies to align stakeholders around common interests such as school success or financial stability. The tactics are costly but national research suggests that these coordinated and systematic efforts can achieve population-level benefits and outcomes. They require trustworthy infrastructure entities and affiliates with shared interests. One of the more viable examples in the region is Santa Fe Connect program that is a cooperative initiative of Santa Fe County and Santa Fe City that coordinates and aligns service providers (city, county, and nonprofit). Agencies in the network are connected through a shared technology platform enabling navigators to send and receive secure electronic referrals, address residents' social needs, and improve individual and community health. Currently, Triad funds several partner organizations in the Connect network, but Triad Community Partnerships is not directly engaged with the network. The Anna, Age Eight project is another example of a statewide initiative that seeks to weave together services to mitigate childhood trauma. Recently, this project team conducted a regional survey to identify gaps in services in Rio Arriba County. The initiative stalled due to limitations with community-based infrastructure organizations that have limited capacity to enact broader systematic interventions. Potential additional investments in those projects might help them fulfill their long-term goals.

Capacity Enhancement

As noted in the discussion of collective impact efforts, capacity of community-based organizations is a reoccurring challenge with modest-sized nonprofit organizations and even local government entities. Triad's support to three primary partners through long-term investments and partnership has sustained and enhanced the operations of those organizations. Additional efforts to support other infrastructure organizations in other counties might serve the community. Furthermore, the Lab could consider how employees might serve as volunteer leaders in community-based organizations. There are numerous example of employees serving as board members and providing valuable support to community organizations. Additional efforts to support employees who seek to serve voluntary leadership roles might be fruitful for all stakeholders.

Data and Reports

The Lab has substantive analytic capabilities as was demonstrated by the partnership in this project. Several community-based organizations (cities, counties, regional funders) seek to understand and maintain information and data about the region. Further partnerships in this area might blend expertise at the lab with regional needs for enhanced information management and processing. These types of reports can be valuable to national funders as they seek to identify funding opportunities in the region.

Performance Metrics

Determining and setting the community-impact objectives of the Lab could guide investments and community activities. Currently, the community impact plan sets forth strategies to guide investments. It does not, however, set objectives that could inform decision making and measurement. As noted, the current strategy disburses funds to a large number of community-based organizations, but assessment of outcomes and impact is difficult. Setting these priorities is difficult and complex due to the various stakeholders and priorities. Working cooperatively with partner organizations might provide additional strength to subsequent performance assessments.

Marketing and Communications

Finally, marketing and communications plays a vital role helping all stakeholders (internal and external) understand the impact of Triad's community investments. There are a number of potential opportunities for additional investment to help community members understand and appreciate how Triad and the National Lab invest in the local community and how employees are active members in the community. This was not a primary area of focus for the review, but it became apparent that stakeholders were at times unaware of community investments and the role of the Lab in community partnerships.

Next Steps and Additional Research

Each of the investment opportunities outlined here would benefit from additional study. Through a coordinated effort with the community partnership office and affiliated community-based organizations, Triad could develop a more robust community investment plan that outlines a nuanced and multifaceted approach to community impact. Such a plan would consider how aligned activities of the Lab (e.g., workforce) might work with employee engagement opportunities and how those are supported through philanthropic investments. There is also an opportunity to better understand how peer institutions conceptualize community investment if we search for additional models that could be adjusted to fit the context.