

PRESIDENT'S REPORT
MEETING OF THE BOARD OF DIRECTORS
SCHOOL FOR ADVANCED RESEARCH
AUGUST 14-15, 2015

Introduction. In June 2014 I assumed the presidency of SAR with optimistic plans for the institution's future. Reality intruded, as it inevitably does, and what I found soon after arrival was an institution afflicted by a significant level of administrative disarray and a looming financial shortfall. In short, circumstances required that I focus primarily on management issues and in particular on SAR's need to bring its development efforts up to contemporary standards. In this report I briefly review the major events of the past twelve months, outline plans for the fiscal year that began on July 1, and offer a vision of where SAR can go from here.

Administrative issues. Board members who haven't been on campus recently will note many new faces among the institution's staff. The past year has seen personnel turnover of roughly one-third. Some of the departures were voluntary; many were not. In the latter category was the dismissal of our vice-president for development as well as the director of physical plant. Several staff members, including Lynn Baca, director of SAR Press, and Laura Elliff, acting director of the IARC, either retired or left voluntarily to pursue other career opportunities. Four staff members of SAR Press have been laid off as a consequence of our new partnership with UNM Press, about which I will say more presently.

The upside of turbulence on the personnel front has been the positive impact of several key hires. In my February report I noted the addition of Brian Vallo and Lorraine Cleveland to our staff. Robert Lujan, who recently retired from state government, has just come aboard as director of physical plant. Sarah Soliz has agreed to serve as SAR Press's acquisitions editor after performing well as interim managing director. Appointment of a new director of development is imminent.

SAR's overall staff size has been reduced by about 20 percent. This presents significant challenges for some of our divisions, especially Scholar Programs, which lost a third of its staff as the result of a voluntary departure. In general, however, I'm confident that our ability to deliver high-quality programs has been unaffected by these changes.

Development activities. SAR's effort to mount an effective development program got off to a bumpy start that has been followed by a modest recovery. We have worked hard to improve our communication strategies, clean up the Raiser's Edge donor database (afflicted by inconsistent coding), implement a more professional approach to advertising, and keep better records of encounters with members and donors. As you know, we met and then exceeded the spring fundraising needed to meet Eric Dobkin's \$100k challenge, which allowed us to hit the target for our FY16 budget. Both the year-end and spring fund drives showed small but steady progress in convincing SAR alumni that their contributions are welcome and needed.

SAR continues to offer an impressive number of public events. A retrospective review of the FY15 calendar shows that we sponsored roughly 75 events, including art talks, exhibits, colloquia, Sparks talks, membership lectures, receptions, and field trips. The biggest single event of the past year was the lecture by Nick Bostrom of Oxford University, which drew an audience of about 250, followed by a well-attended campus reception. The lecture was helpful in nudging us to develop an integrated process of planning, preparation of press releases, and marketing that will prove useful in other events of this kind.¹

Membership numbers are solid although by no means as high as we would like to achieve. We ended FY15 with 576 members who generated approximately \$118,000 in revenue. Those figures are better than those tallied at the end of FY14, (439 members and revenue of \$61,505). The biggest increase was registered at the President's Council level (\$2500/yr), which increased from 12 to 22. Much of the increase in PC membership was the result of effective lobbying by Susan Foote and other board members. The challenge going forward is to sustain that number and increase it further.



Reception for Nick Bostrom lecture, June 2015

Institutional grant support remains stable. SAR's relationship with the Anne Ray Charitable Trust is strong, and we have benefited greatly from the ARCT staff's advice and commitment to the highest standards of accountability. SAR received an invitation from the Andrew Mellon Foundation to apply for a diversity grant that would fund one Latino resident scholar in FY17 and two each in FY18 and 19. We will be informed of the foundation's decision in about six weeks. After a second negative decision from NEH, which had supported resident scholar positions for decades, we decided to stand down for a year and reassess the way we have approached our renewal requests.

¹ The Bostrom event was underwritten by support from Vera Campbell, Marcus Randolph, Lee Caldwell, and Susan Foote, to whom I wish to express my thanks.

The retirement of Janie Miller gave us the opportunity to apply the same financial analysis to SAR's field trip program that we applied to SAR Press. That analysis showed that our field trips registered a significant net loss when staff salaries were added to the equation, although this may have been offset to a modest degree by the way the program incentivized membership upgrades. We are actively exploring the possibility of outsourcing management of field trips, and I hope to have news about progress on that front by the August meeting. The principal goal is to operate the program on a break-even basis or, better yet, at a small profit.

In the past year we have organized at least a half-dozen events primarily focused on donor cultivation. This year the focus must shift to the next step, from cultivation to solicitation. We have also concluded that SAR's activities have been overly focused on the academic calendar, with a light schedule during the summer months. Yet it is during those months that many of our most significant actual or potential donors are in Santa Fe. This argues for efforts to provide summer visitors with a fuller roster of events that can sustain and intensify their interest in SAR.

Efforts to monetize campus resources, including the seminar house, the board room, and the main patio, are moving forward. The Museum of International Folk Art rented the seminar house and its lodging spaces for several days of meetings, and a handful of other similar contracts are under consideration. Our fee schedule for space rentals is under review, and fees are likely to be increased. I am hopeful that by fall we'll have information about short-term rental of campus spaces (for events other than weddings) available in the SAR website.

At the February meeting the board granted me considerable latitude to explore possibilities for joint ventures with other institutions, the goal being to increase SAR's visibility without increasing its budget. We are currently working on a prospectus that I expect to circulate among a select group of colleges, universities, and research centers in the fall.

SAR Press. By mid-August the Press will have completed all necessary staff layoffs. A two-year inventory of books was delivered to UNM Press's warehouse on July 29. We expect that sales and inventory management will be fully integrated into UNMP's online system by the end of August and possibly earlier. A few details await resolution, but we are confident that the partnership will be fully operational by September. Sarah Soliz has been named SAR Press's acquisitions editor and sole employee. Sharon Tison and I will be continuing efforts to mark down and ultimately dispose of the portion of SAR Press's back stock that is unlikely to sell. Nevertheless, we expect to maintain a campus inventory of at least 25,000 units for the foreseeable future.

This transition opens the door to discussions about where SAR Press should go from here. I look forward to a productive discussion of this issue at the meeting of the AAA Committee.



Isidro Gutiérrez and Robert Lujan loading books for transport to UNM Press warehouse.

Scholar Programs. Demand for resident scholar positions continues to be strong even though our fellowship stipends (\$30,000 for predoctoral positions, \$40,000 for postdoctoral ones) lag behind those of peer institutions. Application rates are not evenly divided among scholar categories, however. We receive many more applications for Weatherhead fellowships than for the Lamon, Anne Ray, and Campbell fellowships, which have narrow eligibility requirements. Mellon fellowships, should they be funded, will not rectify this imbalance, although they will add prestige to the program and provide modest support for SAR's indirect costs. Over the long term SAR must add one or two additional unrestricted fellowships to the program for it to remain competitive.

Should the Mellon proposal be funded, SAR will need to recruit several senior Latino scholars to serve as mentors to the Mellon/SAR fellows, for which they will be paid a stipend. In light of our location, identifying talented Latino scholars for this purpose will not be difficult. It should be noted, however, that Hispano/Latino scholarship and policy issues have never been an explicit focus of SAR programs even though a number of first-rate Latino scholars have been awarded resident scholar fellowships over the years.² This Latino program, if launched, would thus represent a new initiative. In light of our location and New Mexico's rich Hispanic heritage, I'm convinced that this would be a welcome development.

Nicole Taylor, Director of Scholar Programs, has done an admirable job of managing her division's heavy workflow despite the loss of one of her two staff members. Maria Spray was promoted to Program Coordinator, which entails a much higher level of responsibility than was associated with her previous position.

² Among them: Ana María Centella Díaz, Estevan Rael-Gálvez, Jason De León, Laura Gómez, Robert Alvarez, and Miguel Díaz-Barriga.

IARC. Under the leadership of director Brian Vallo and his excellent staff, the IARC continues to make its collections available to artists and scholars, organize and present a series of well attended public seminars and lectures, and pursue its path-breaking program of community curation, the latter largely funded by the Anne Ray Charitable Trust. In May 2015 I gave a keynote lecture on the IARC's close working relationships with Zuni and, more recently, Acoma Pueblo to a gathering of museum professionals at Indiana University. It was clear from the response that SAR's program of community consultation is creating a new best-practice norm that we need to publicize more aggressively. My hope is that we can add a detailed description of this program to the SAR website within the next year.

This year the IARC's spring lecture/seminar series involved a productive collaboration with the Ralph T. Coe Foundation, which stewards an important collection of Native American art gathered by the late Ted Coe. Based on conversations with Coe staff members, I believe that the Coe may be willing to discuss a more formal relationship with SAR. Although I'm open to that possibility, any move in that direction would have to be made cautiously and only after extensive consultation with the SAR Board of Directors.³

Jonathan Batkin, director of the Wheelwright Museum, has suggested that this might be an apt moment for the IARC to develop an exhibition of items from its collection for one of the Wheelwright's new galleries (currently hosting an exhibition by the Coe Foundation). The cost is likely to be in the \$50,000 range. I'm convinced that this would be a good opportunity for our collection to be seen and appreciated by a wider public.

Looking forward. My goals for the next twelve months include the following:

- Move SAR's development program toward a secure funding model that will sustain our current annual budget of about \$2.76 million. Expansion of programs can resume once we've proven the sustainability of the status quo.
- Improve/redesign SAR's website, which is now our most important vehicle of communication to the world at large. A grant from the Paloheimo Foundation provides some funding for this purpose, although probably not enough for a full redesign and implementation of an improved content-management system. Badly needed changes to the site include: (1) making it render legibly on mobile devices, which it currently does not; (2) improving the way it solicits and manages donations; (3) shifting the site to an editing platform that is easier to use and thus manageable by multiple staff members; (4) offering a platform for distribution of scholar working papers and the 170+ sample chapters from SAR Press books currently buried many clicks into the website; and (5) creating a space for alumni news. I expect that in the next four months we will launch Doug Schwartz's Arroyo Hondo website, which has been several years in the

³ According to the most recent Form 990, dated 2012, the Coe Foundation has assets valued at \$13.1 million. This appears to include the value of the collection itself. The Foundation's annual budget is consistent with a portfolio of investments worth about \$4.5 million.

making. Arroyo Hondo will thus become one of the most extensively documented archaeological sites found anywhere online.



Screen shot of Arroyo Hondo website scheduled to launch later this year

- Increase significantly the (paid) use of SAR facilities by commercial and non-profit groups to the extent that this is compatible with our regular operations.
- Improve SAR's public visibility through presentation of high-profile events and systematic use of press releases. One such event, a lecture by Douglas Preston at the Lensic, is scheduled for October 20. The lecture coincides with the appearance of Preston's forthcoming *National Geographic* article on an expedition to a spectacular ancient city in the Honduran rainforest previously unknown to archaeologists. We also hope to continue presenting occasional lectures at Las Campanas, a practice launched in 2014 thanks to the efforts of Carl and Carol Trinca.
- Intensify efforts to promote planned giving strategies among Legacy Circle members and SAR alumni, an initiative led by board member Elizabeth Roghair.
- Continue efforts to communicate to colleges, universities, and research institutions SAR's willingness to consider joint ventures that would use our Santa Fe location and campus as a platform for research, short-term courses for undergraduates, and the like. (We have one such arrangement with Dartmouth College, which will be running a study-away course in Santa Fe every other year. This produces no revenue for us, but it's a start.)

On a longer-term basis, I will be working hard to attract one or two multi-year research projects to SAR. Such projects must be consistent with SAR's mission and able to pay relevant indirect costs. Doug Schwartz's Arroyo Hondo project, which served SAR well for many years, is an example of the type of project SAR needs to communicate to the general public, as well as to the academic community, a clearer sense of the institution's scholarly ambitions and its importance as a center for advanced study.

In closing, I would like to thank the Directors for their advice, labor, and financial support during my challenging first year as president. Dorothy Bracey has been an indefatigable partner over the past twelve months, but many others among you have made significant contributions of time and expertise. I especially want to acknowledge Eric Dobkin's contribution to the process that helped us achieve a clearer understanding of SAR's financial situation so that we could respond to it in a decisive way. Eric's generosity to SAR has been remarkable, but I value equally his experience, financial acumen, and candor. He may be rolling off the board – only temporarily, I hope – but he leaves behind hard-won knowledge and procedures that SAR will need to survive and prosper in the future. ◆