



Strategic Plan Addendum: 2024 Progress Updates

As of September 25, 2024

Community Impact

Goal: Further develop grantmaking strategies, outcomes and practices based in equity principles.

2024 Objectives

- Build upon Trust-Based Philanthropy (TBP) practices across all grant programs.
 - **Updates as of 2/7/24**
 - Incorporating TBP practice of multi-year funding through Google/Rovio grant program.
 - Planning a TBP Lunch & Learn for granting partners on TBP Principles (eg. Sandia Foundation, NMOGA, etc.).
 - **Updates as of 3/27/24**
 - Working with the Social Giving Club to further incorporate TBP Principles into their Grant Night.
 - **Updates as of 6/5/24**
 - Hosted Community Cruise and PEEP events back-to-back to support attendance at both events by key stakeholders.
 - Greatly reduced burden on applicants through the Hancock Family grant program.
 - **Updates as of 9/24/24**
 - Worked with the Sandia Foundation to reduce the burden for nonprofits by submitting the report and request in one application.
 - Spoke with the Sandia Foundation regarding multi-year funding commitments and increased award distributions.
 - Conversations with the Hammersley Fund advisors to remove burdens on the process for funding.
- Expand strategy around Impact funds to include: Strengthening our Partners (capacity building, sharing expertise & best practices) Community Power Building and dEi Knowledge Building.
 - **Updates as of 2/7/24**
 - Supporting nonprofit attendance at Groundworks Conference, a social-sector conference.
 - Contracting with the Grant Plant to host 3-day intensive grant-writing training for nonprofits.
 - Continue Trustee volunteer program in developing financial capacity for nonprofits.
 - **Updates as of 3/27/24**



- Partnering with The Anderson Foundation to provide greater support at the grant-writing training, as well as the UNM Evaluations Lab and other proposed projects to support capacity building for nonprofits.
- **Updates as of 6/5/24**
 - Ongoing conversations with nonprofits and funders on loan funding to support government grants.
- **Updates as of 9/24/24**
 - Hosted Lunch & Learn in partnership with Groundworks NM and Beverly Bendicksen to support nonprofit learning on Board cultivation and recruitment.
 - Hosted 3-day immersive grant writing training for 45 nonprofits, in partnership with The Anderson Foundation, Nusenda and The Grant Plant.
 - Supported nonprofit convening centered on: Education, LGBTQ+ Advocacy and Domestic Violence.
- Re-evaluate the existing strategic grantmaking framework through a community-informed process.
 - **Updates as of 2/7/24**
 - Will begin discussions and re-evaluation in Q3 & Q4.
 - **Updates as of 3/27/24**
 - No progress update at this time. The Q3 & Q4 timeline is still in place for initiating this process.
 - **Updates as of 6/5/24**
 - No progress update at this time. The Q3 & Q4 timeline is still in place for initiating this process.
 - **Updates as of 6/5/24**
 - Discussions began with members of the Community Impact Committee and the during strategic planning sessions with COO, Development Director and Community Impact Director.
- Build upon Values-Aligned Philanthropy (“VAP”) work.
 - **Updates as of 2/7/24**
 - Draft policy updates in-progress to include VAP and Anti-Hate Language. Will be presented to the Board in the April 2nd meeting.
 - **Updates as of 3/27/24**
 - Grantmaking Policy updates have been approved by the Community Impact Committee and will move to the Board on April 2.
 - **Updates as of 6/5/24**
 - Values-Aligned policy updates approved by the Board of Trustees on April 2.
 - In planning stages for a Values-Aligned Philanthropy open house to support understanding and awareness for the community.
 - **Updates as of 9/24/24**



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- Working with Communications team and COO to develop timeline for communication of VAP policy to all donors and stakeholders of the Foundation.
- Continued evaluation and utilization of the anti-hate screen tool from Horizons.
- Expand cross-departmental collaboration to increase funding toward key impact areas.
 - **Updates as of 2/7/24**
 - Monthly strategy meetings with COO, Development & Marketing Director and Community Leadership Director to understand current key impact areas and strategize around alignment moving forward.
 - **Updates as of 3/27/24**
 - Developed a list of focus areas for Foundation funding & influence, continuing to strategize around funding possibilities & commitments with the Leadership Team.
 - **Updates as of 6/5/24**
 - Continuation of strategy & alignment around Foundation funding initiatives across Community Impact, Community Leadership & Development teams.
 - **Updates as of 9/24/24**
 - Continuation of monthly strategy meetings to increase alignment around Foundation funding initiatives across Community Impact, Community Leadership & Development teams.
 - Continued conversations with Foundation teams to increase impact and strategy around DAFs, Giving Circles, and other areas of influence.

Community Leadership

Goal: Continue to move beyond grantmaking and employ all resources available to the Foundation to serve as valuable partners to create positive change, centered in values of diversity, equity and inclusion.

2024 Objectives

- Build and expand capacity to serve as a philanthropic intermediary.
 - **Updates as of 2/7/24**
 - Participating in a funder cohort to expand federal funding into NM, resulting in detailed research of available opportunities.
 - First single audit (2022) received no findings, continuing with existing internal



- procedures as the grant program continues.
- Continue to support smaller grantees with compliance and best practices in the Housing Stability Program.
- **Updates as of 3/27/24**
 - Working with consultant team to review learnings from previous intermediary work in preparation for the next project and to assess capacity needs for ACF/NMCT to continue to develop this work.
 - Reflecting on the shift of internal staff role to allow for more expansive intermediary work.
- **Updates as of 6/5/24**
 - Continuing work with consultant team to review learnings from previous intermediary work in preparation for the next project, with a hold on analysis of NMCT work as the NMCT board decides direction for the organization.
 - Continuing participation in federal funding group to analyze and prioritize federal funding opportunities in New Mexico.
 - Planning shift of internal staff role to allow for more expansive intermediary work.
- **Updates as of 9/23/24**
 - Continuing work with consultant team to review learnings from previous intermediary work in preparation for the next project. Report of case study to be completed by December 2024.
 - Continuing participation in federal funding group to analyze and prioritize federal funding opportunities in New Mexico. Group has launched an LOI to find intermediary to support nonprofits accessing federal funds.
 - Shift of position from Housing Stability Project Manager to Intermediary Projects Manager to broaden scope of opportunities. Intermediary Projects Manager is researching possibilities.
 - Researching possible second intermediary position to focus on capacity building and technical assistance support for nonprofits applying for federal funding. This would be funded through a grant from a local funder.
- Build and expand on key relationships with government & national philanthropy to identify regranting/intermediary opportunities and to intersect with public policy and advocacy work.
 - **Updates as of 2/7/24**
 - Housing Stability Federal Grant Program in year 3.
 - Continued grant programs with Google/Rovio, Rockefeller Foundation, Annie E Casey Foundation.
 - **Updates as of 3/27/24**
 - Working with consultants to complete final reporting requirements and evaluation/analysis of Housing Stability Federal Grant Program for use in future planning.
 - Working toward dispersing full Rockefeller Foundation funds within the next quarter to Native-led organizations



- **Updates as of 6/5/2024**
 - Sharpening of strategy and focus for the department on key areas of housing and democratic process.
 - Continuing to work with consultants on final reporting requirements and evaluation/analysis of Housing Stability Federal Grant Program for use in future planning.
 - Working with consultants and community partners to develop data and research to support housing education for future public policy and advocacy work.
 - Dispersed majority of Rockefeller Foundation funds to Native-led organizations focusing on job creation and economic stability in Native communities.
 - Continuing to build relationship with Annie E. Casey with focus on housing opportunities and support for youth.
 - Staff members host 7 regular meetings with community partners and nonprofits in support of our role as a convenor and facilitator of productive conversations.
- **Updates as of 9/23/2024**
 - No updates at this time.
- Build infrastructure to expand advocacy & public policy work
 - **Updates as of 2/7/24**
 - Conducted research to create a draft of internal procedure and priorities.
 - The team visited the legislative session to observe.
 - Drafted charter to begin discussion of development of Board committee to support public policy/advocacy work and Community Leadership. This will go before the Governance Committee in March.
 - **Updates as of 3/27/24**
 - Draft of procedure and priorities are ready for staff and committee review.
 - The Governance Committee determined the next stage for committee review of procedure and priorities.
 - Formed funders group to support the journey of our policy work and develop collaborative efforts among funders.
 - **Updates as of 6/5/2024**
 - Draft procedure shared with governance committee for feedback and review.
 - Continued conversations in funders group, leading to leveraging funds with partner funder to offer two small initial grants to support democratic process.
 - **Updates as of 9/23/2024**
 - Draft procedure was reviewed by one Trustee and Governance Committee member and has been sent for review to an additional Trustee.
 - Continued conversations in funders group on how we can support public policy advocacy work as a sector.
 - Grant made in collaboration with another funder to a nonprofit focused on support for democratic process.



- Establish internal mechanism to fund community leadership work
 - **Updates as of 2/7/24**
 - No progress update at this time.
 - **Updates as of 3/27/24**
 - Budget for department established through 2024 budget.
 - Working with Community Impact & Development to determine potential for a small grant pool.
 - **Updates as of 6/5/2024**
 - No progress update at this time.
 - **Updates as of 9/23/2024**
 - Grant fund established for 2024.

- Review & develop Impact Investment strategic direction
 - **Updates as of 2/7/24**
 - Scheduled to share mission, vision and values and alignment with Impact Investment committee to begin discussions
 - **Updates as of 3/27/24**
 - Began initial discussion with the Impact Investment committee on alignment of mission, vision and values.
 - Impact Investment committee agreed to move forward with inviting the consultant group to present at an upcoming committee meeting regarding housing-related impact investment strategies.
 - **Updates of 6/5/2024**
 - Impact investment committee made decision to focus strategy for future investment in three areas, one being housing specific, which aligns with focus of the Community Leadership Department.
 - Consultant group will connect with committee in the coming months.
 - **Updates of 9/23/2024**
 - Consultant has met with all committee members for 1:1 conversations around process and direction. Consultant will share best practices for impact investment efforts broadly and in the realm of housing specifically and will share a proposal for an investment at the November Impact Investment Committee meeting.

- Create opportunities to engage donors and other funders in Impact Investment program
 - **Updates as of 2/7/24**
 - No progress update at this time.
 - **Updates as of 3/27/24**
 - Shared Annie E. Casey Foundation as potential investor in housing-related Impact Investment funds. Will continue to develop this relationship and investigate housing-related investments at the Impact Investment Committee level.
 - **Updates as of 6/5/2024**
 - No progress update at this time.



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- **Updates as of 9/23/2024**
 - No progress update at this time.
- Center equity internally including but not limited to, wellness at work, power-sharing and decision-making, and training/learning opportunities
 - **Updates as of 2/7/24**
 - Learning Director aspect added to Celia's title to continue the change support work for our staff.
 - Continued engagement in nonprofit Wellness at Work support group.
 - Community Leadership team members engaged in dEi trainings at national and local level.
 - **Updates as of 3/27/24**
 - The Community Leadership team participated in a Wellness at Work session presentation at Groundworks social sector conference.
 - Hosted a Lunch & Learn around incorporating dEi into the workplace.
 - A Staff member was moved to full dEi Associate position.
 - Introduced team approach to employee support as well as staff survey.
 - Staff member accepted into Council on Foundations' Bridging (across differences) Cohort.
 - **Update as of 6/5/2024**
 - Staff survey results were shared with the staff and work group formed to prioritize and move forward on suggestions.
 - Staff member began Council on Foundations' Bridging cohort and shared initial learning with staff members at recent staff meeting.
 - Two staff members continue leadership with Wellness at Work nonprofit group.
 - Staff member co-hosts monthly DEI Peer Learning Circle through Council on Foundations.
 - **Update as of 9/23/2024**
 - Staff survey work group continues to reflect on policy changes to support the staff.
 - Staff member began Council on Foundations' Bridging cohort and shared additional learning with staff members at recent staff meeting.
 - Two staff members continue leadership with Wellness at Work nonprofit group.
 - Staff member co-hosts monthly DEI Peer Learning Circle through Council on Foundations.

Organizational Sustainability & Endowment Growth

Goal: Become a self-sustaining organization by the end of 2026, through intentional growth of the endowment and developing strategically aligned fee for service revenue streams, allowing the Foundation to fully fund its operations without relying on donations to support operations.



Internal: The endowment growth goal target is \$200 million by 2026.

2024 Objectives

- Collaborate with the DEI Committee, Advancement Committee, Community Impact team, Executive team and Marketing team to develop a communications plan for the roll out of the new gift acceptance policy with our donor base.
 - ***Updates as of 2/7/24***
 - Initial step of introducing the Advancement Committee to the ACF Strategic Plan with collaborative discussion from Community Impact and Community Leadership departments completed.
 - Draft Endowment Growth Plan completed.
 - RFP for Feasibility Plan consultant distributed. Consultant will be selected by the end of February.
 - ***Updates as of 3/27/24***
 - April Advancement Committee meeting will include the following:
 - Cohesive Messaging Discussion: A start to creating template talking points for Trustees and Staff to utilize in conversations.
 - Case Studies Specific to Recent Feedback: "How would you handle this conversation?"
 - ***Updates as of 6/5/24***
 - Communications roll-out plan is on hold until July/August. Other than existing information on the Foundation's website, no specific communications work is occurring at the moment to prioritize the donor engagement plan.
 - ***Updates as of 9/23/24***
 - Communications roll-out continues to be on hold. Timeline will be revisited in Q4 of 2024, considering priorities including the Annual Business Meeting Re-imagining, the donor engagement plan, and general scheduling and capacity.

- Work closely with the Advancement Committee members to connect staff with new donors, new fund opportunities, and provided resources to help members raise dollars for the Foundation
 - Updates as of 2/7/24
 - No progress update at this time.
 - Updates as of 3/27/24
 - Initial step of introducing the Advancement Committee to the ACF Strategic Plan with collaborative discussion from Community Impact and Community Leadership departments completed
 - Draft Endowment Growth Plan completed



- RFP for Feasibility Plan consultant distributed. Consultant will be selected by the end of February. Consultant was chosen; however, the Endowment Growth Plan needs to be discussed further.
- Development Fund Updates:
 - Funds opened: 2
 - Funds in progress: 14
 - New inquiries in 2024: 11
 - In progress from 2023: 3
 - DAFs: 7
 - Estate Agreements: 4
 - Quasi Endowments: 1
 - Organization Endowments: 2
- **Updates as of 6/5/24**
 - Despite the slow-down of the endowment growth campaign in order to focus on the donor engagement improvement plan, fund activity remains consistent, with particular growth through NMCT-related activity.
 - Development Fund Updates:
 - Funds opened: 7
 - 2 Organizational Funds, 1 Pass Through, 2 Estate, 2 DAFs
 - New inquiries in 2024: 19
 - Funds in progress: 12
 - DAFs: 8
 - Estate Agreements: 2
 - Quasi Endowments: 1
 - Organization Endowments: 1
- **Updates as of 9/23/2024**
 - Working with Bob Bowman, Advancement Committee Chair, to cull through the survey data from the Advancement Committee. Data includes members of the Committee interested in giving, introducing us to a friend/colleague, and hosting an event at their home.
 - Development Fund Updates:
 - Funds opened: 15
 - 4 Organizational Funds, 1 Pass Through, 4 Estate, 6 DAFs
 - New inquiries in 2024: 27
 - Funds in progress: 12
 - DAFs: 5
 - Estate Agreements: 5



- Quasi Endowments: 1
- Organization Endowments: 1
- Work closely with CEO to ensure long-standing organizational relationships are supported after departure
 - **Updates as of 2/7/24**
 - No progress update at this time.
 - **Updates as of 3/27/24**
 - 2024 Donor Call Plan is established to start these conversations
 - **Updates as of 6/5/24**
 - This work is anticipated to begin in earnest at the end of Q3, once the CEO returns from Sabbatical.
 - **Updates as of 9/23/24**
 - Preliminary planning to establish a subcommittee for upcoming CEO transition and legacy giving/event.
 - Staff has developed a map of key fundholders and assigned relationship managers
- Meet 2024 projected contributions amount, \$9.75m
 - **Updates as of 2/7/24**
 - See projections provided separately
 - **Updates as of 3/27/24**
 - No projections provided at this time. Finance Committee to refine projections based on timeframe of endowment growth campaign discussion.
 - **Updates as of 6/5/24**
 - \$1.39 million as of 3/31/24
 - **Updates as of 9/23/24**
 - \$2.16 million as of 9/24/24
- Diversify donor base by creating a plan to engage with new donors so we began to reflect the community we service on all applicable axes of identity, i.e., race/ethnicity; gender and gender identity; sexual orientation; religious, spiritual, or ethical practices/values systems; age; ability; veteran status; socio-economic status
 - **Updates as of 2/7/24**
 - Will initiate upon completion of Endowment Growth Plan feasibility study.
 - PRIDE Circle in 2nd Year of operation.
 - **Updates as of 3/27/24**
 - No progress update at this time. PRIDE Circle continues regular activity of all giving circles.
 - **Updates as of 6/5/24**



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- PRIDE Circle continues regular activity, no additional updates at this time.
- **Updates as of 9/23/24**
 - Currently engaged with Hispanics in Philanthropy (HIP) on their annual conference in 2025, which will be hosted in Albuquerque.
 - Partnering with the ABQ Hispano Chamber on HIP conference sponsorship
 - Staff to join Hispanic in Philanthropy Conference Advisory Committee, CEO to join Host Committee.