

ACF/NMCT CEO Transition Report: October, 2025

Submitted by: Marisa Magallanez, incoming President & CEO

This document is intended to provide the Board with a high-level summary of transition activities during October 2025, related to goals and activities outlined in the [Transition Summary](#).

Transition Team (TT)

- **Project Manager:** Calle
- **Team Members:**
 - **Staff:** Marisa, Nick, Randy, Denise, Letisha
 - **Trustees:** Emily, Debbie, Walter, Katie, Jose, Michelle, Tom

Transition Team Purpose: to provide continuity, ensure critical organizational knowledge is transferred, align and engage internal and external stakeholders, and create a structured plan that supports a smooth, thorough transition, setting the new President & CEO up for early success.

Key Outcomes

- Transparent, trackable process for Board and leadership
 - Clarity around expectations, deliverables, and accountability
 - Foundation for long-term leadership success
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1. Transition with Intention

Key Outcomes

- CEO coaching and onboarding is in place
- Clear success measures and evaluation framework
- Strong start for the CEO with support and alignment

Transition Period Objectives with Key Activities

- Establish a structured transition team, plan and cadence (Marisa + TT + Calle)
 - **100% Complete.** The transition team is meeting monthly, and scheduled through December. 2026 dates are now set.
 - Implement executive coaching to support CEO onboarding (Marisa + Emily + Debbie)
 - **In Progress - 90% Complete.** [Clotilde Perez-Bode Dedecker](#) has been identified as the Executive Coach. Introduction meeting with Emily and Debbie was positive, and we are in process of establishing a contract. **Anticipated Completion Date: 11/15/2025 (coaching will continue into 2026).**
 - Define CEO success, metrics, and evaluation strategy (Marisa+ Emily + Debbie + Exec Committee)
 - **In Progress - 70% Complete.** The Executive Committee (EC) and Board have had initial input on 2026 priorities. Goals will be approved by the Executive Committee on 11/19. **Anticipated Completion Date: 11/19/2025.**
 - Finalize and execute a professional development plan for the new CEO (Marisa+ Emily + Debbie + Exec Committee)
 - **Ongoing.** Initial feedback meeting conducted on 7/7 with Emily, Debbie, Becky and Koya. Marisa shared a professional development plan with the EC on 9/10, and an update will be provided on 11/19. Plan elements in progress and will be reported to the EC.
 - Establish positive internal culture around transition
 - **Ongoing.** Planning for improved internal communications and change management facilitation schedule for 2026 is all underway, to be completed by 12/15/2025 for implementation in 2026. **This work will continue into 2026.**
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2. Organizational Alignment for Growth

Key Outcomes

- Organizational structure & staffing supports strategic goals
- Role transitions and responsibilities clearly communicated
- Staffing roadmap aligned with long-term vision

Transition Period Objectives with Key Activities

- Finalize organizational restructure plan (Marisa)
 - **In Progress - 70% complete.** Initial staffing plan developed and adjustments made internally to support backfilling my current role. 2026 staffing is in final

development in concert with the budget process. **Anticipated Completion Date: 11/30/2025**

- Clarify Randy's roles and responsibilities (Marisa + Randy + Executive Committee)
 - **Ongoing.** Randy is leading outreach to key donors. Identified and prioritized 44 donors & past Trustees for Randy & Marisa to meet with, along with small groups to host over breakfast or lunch. Scheduling is moving along, however more meetings will move into early 2026 than originally anticipated due to end-of-year scheduling availability from the donor side. **This work will continue into Q1 of 2026. (This ties to stakeholder engagement outlined in Section 3.)**
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3. Community & Stakeholder Engagement

Key Outcomes

- Stakeholder trust reinforced during leadership change
- Public-facing communications reinforce continuity and new vision
- CEO builds visible and credible presence locally and nationally

Transition Period Objectives with Key Activities

- Map and manage relationships with key stakeholders (donors, funders, past Trustees, public partners, national networks, Board and Staff) (Marisa + Randy + Denise + TT)
 - **Ongoing.** 70% Staff & Trustee 1:1s have been completed and I have met with 20 stakeholders as of 10/31/25. A full list can be found in the [Transition Report - Stakeholder Engagement Tracker](#).
Anticipated Completion Date: 6/30/2025, total stakeholders identified - 149
 - Activity & Major Themes from July - October Completed Meetings
 - *Staff* (11 of 16 conducted as of 10/31): Excitement about the future, questions around staffing and vision for 2026, individual roles, discussions around growing out of the facility, intentional culture development. **Anticipated Completion Date: 12/15/2025**
 - *Trustees* (20 of 28 conducted as of 10/31): Very supportive, encouragement to ask for help/support. Discussions around vision for 2026 and beyond. General advice around solid fundamentals, focus on proactive development culture, increasing foundation visibility, pacing. Includes ACF & NMCT Trustees. **Anticipated Completion Date: 12/15/2025**

- *Donors* (7/42 conducted as of 10/31): Very positive interactions, interest in vision for the future and continued engagement. **Anticipated Completion Date: 3/31/2026**
 - *Other Stakeholders - Past Trustees, Partners, Funders, Community Leaders, Government Partners* (15/61 conducted as of 10/31): Overall very positive meetings, particularly around NMCT for government/philanthropy partners. Past Trustee meetings have been very supportive, with healthy dialogue around the direction of the Foundation. I have also met with several donors who have previously shared displeasure with the Foundation. Meetings were positive, with an openness to stay connected through my tenure. **Anticipated Completion Date: 6/30/2026**
 - Increase Community Engagement & Visibility (locally and nationally)
 - **Ongoing.** In October, I attended eight community and ACF events, such as Economic Forum, Holman's 70th Anniversary, UNM Alumni Events, Hispanic Heritage Awards, WESST Silver Soiree and the Indian Pueblo Cultural Center/Homewise luncheon, along with all ACF events. I have given remarks or led three of those events. **This work will continue into 2026.**
 - Develop public relations and community engagement plan tied to new CEO assuming the role January 1, 2026 (Marisa + Jose + Denise)
 - **15% Complete.** The initial planning meeting for the Q1 public relations and community engagement plan was completed as scheduled, with subsequent planning meetings happening in November. **Anticipated Completion Date: 11/30/2025 with implementation in 2026.**
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4. Momentum from Day One

Key Outcomes

- Clear, aligned direction and early team cohesion
- Staff and Board buy-in for strategic vision
- Elevated communications and visibility from the outset

Transition Period Objectives with Key Activities

- Establish 2026 organizational goals based on priority areas (Marisa + Executive Committee + Leadership Team)
 - **In Progress - 70%.** New team and individual bonus plan will be finalized in November, and is moving according to schedule. Organizational goals are ready for approval by the EC in their 11/19 meeting. **Anticipated Completion Date:**

11/19/2025

- Plan Q1 staff orientation (Marisa + Leadership Team)
 - **In Progress - 70%.** Planning for this is underway, and dates are under review for a January staff orientation. **Anticipated Completion Date: 1/31/2026**
 - Plan Trustee Forum (Date TBD, Feb 2026) (Marisa + Leadership Team + Executive Committee)
 - **In Progress - 50% complete.** Dates for 2026 board meetings will be finalized in early November, and plans for the February Forum are underway. **Anticipated Completion Date: 12/15/2025**
 - Establish internal communications plan for alignment and progress (Marisa + Nick + Denise)
 - **In Progress - 30% complete.** An internal communications initiative has been identified, and is in development, to be implemented in January 2026
Anticipated Completion Date: 11/30/2025 with implementation in 2026.
 - Establish external communications plan for increased organization visibility and public awareness (Marisa + Denise + TT)
 - **In Progress - 20% complete** Initial planning for this has started, including increasing our budget for marketing & communications. High-level objectives and strategy are under development. **Anticipated Completion Date: 12/15/2025 with implementation in 2026.**
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90 Day Plan Summary: January 1 - March 31, 2026

The focus of the first 90 days is to ensure a clear, successful transition of leadership, establishing a clear vision, leadership style, and priorities to guide 2026. 2026 centers on deepening proactive donor engagement, mobilizing visible community impact, and investing in the people, systems, and financial discipline that sustain long-term growth, while building the foundation for a decade of bold, innovative impact. Some of the key focus areas of my first 90 days are:

- Establishing clarity of direction with board and staff
- Signaling active, visible leadership, internally and externally
- Defining clear measures of success established with the board
- Building stakeholder confidence through engagement & connection
- Establishing team culture and momentum
- Creating early wins
- Establishing my style and voice

I've outlined key areas for individual and organizational focus. This is further detailed in my first [90 Day plan](#) (First Tab). Additionally, this is aligned with the Organizational Annual Goals submitted to the Executive Committee.

Organizational Focus - First 90 Days

I. Vision & Strategic Direction:

Lay the groundwork for the Foundation's next strategic era by establishing a clear, inclusive process and timeline to update the strategic plan. While the first 90-days will be primarily focused on setting my leadership style and organization goals, it will be important to keep our larger strategic purpose in mind, right from the beginning.

- A. Establish process & timeline for creating 10 year strategic framework

II. Deepening a Culture of Engaged & Proactive Philanthropy

Build the foundation for a more intentional, data-informed, and relationship-driven culture of proactive philanthropy.

- A. Identify all key relationship managers in organization
- B. Establish KPI Dashboard for key metrics related to Development
- C. Ensure 100% of all living fundholders are established a relationship manager by the end of Q1
- D. Finalize a written, two-year endowment growth plan

III. Mobilizing Innovative Solutions to Community Needs

Lay the foundation for innovation and transformative change by positioning the Foundation as a proactive catalyst for collaborative, systems-level solutions.

- A. Identify two capacity-building initiatives, partnerships or funding opportunities for implementation in 2026
- B. Identify two civic leadership initiatives, partnerships or funding opportunities for implementation in 2026
- C. Establish KPI Dashboard for key metrics related to Impact & Leadership

IV. Building Organizational, Culture, Capacity & Sustainability

Strengthen our internal foundation by fostering a culture of clarity, collaboration, and sustainability, demonstrating a leadership style that promotes organizational cohesion and excellence while building a workplace that values and invests in its people. In the first 90 days, there will be significant focus on this area, as I want to ensure I am establishing a clear leadership style and communication practices.

- A. Complete hiring for all open positions and finalize the organizational chart with key responsibilities
- B. Launch initiatives that strengthen culture and communication, including staff wellness, recognition, internal communications, and the “Hello, 2026” all-staff orientation
- C. Establish expectations for organizational excellence through clear parameters and improved internal meeting structures
- D. Implement systems for accountability and sustainability, including KPI dashboards, SOP improvements, and audit readiness
- E. Promote a culture of transparency, inclusion, and professional growth through visible decision-making, leadership development plans, and a cultural assessment survey

Individual Focus - First 90 Days

I. Stakeholder Engagement

Prioritize relationship-building and visibility with stakeholders as the new President & CEO by engaging key donors, partners, and community leaders, laying the groundwork for trust, collaboration, and long-term partnership across New Mexico.

- A. Engage in a minimum of nine donor engagement meetings
- B. Engage in a minimum of 12 key stakeholder meetings
- C. Host at least two open house events to connect to key stakeholder groups as the new CEO
- D. Identify at least 20 statewide relationships to build over first 12 months as CEO

II. Public Relations & Community Visibility

Establish a strong and visible presence as the new President & CEO by fully executing the PR and community engagement plan. In the first 90 days, attend key community

events, actively represent the Foundation in local and national philanthropic networks, and position the organization as a trusted, connected civic leader committed to partnership, collaboration, and community impact.

- A. Launch a refreshed narrative positioning ACF as *“The Community’s Foundation”*
- B. Publish at least one local and one national CEO profile
- C. Share a series of stakeholder messages positioning my leadership and vision
- D. Attend at least six community events to build visibility and connection

III. Board Engagement & Alignment

Build strong relationships and shared clarity with the Board to ensure alignment, trust, and effective governance during the leadership transition.

- A. Host Board Forum & Strategy Session to align on priorities
- B. Define CEO evaluation process and timeline
- C. Meet individually with Trustees on 2026–2027 development engagement
- D. Gather Q1 Board feedback for the CEO
- E. Check in with new Trustees to ensure smooth onboarding and connection

IV. Professional Development & Learning

Invest in early learning and leadership growth to strengthen effectiveness and connection within the community foundation field.

- A. Complete at least three individual executive coaching sessions
- B. Build peer connections by engaging with at least two community foundation leaders nationally



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Albuquerque Community Foundation & New Mexico Community Trust External Communications Plan: Leadership Transition and New President & CEO Visibility January - June 2026

Overview: Marisa Magallanez has been officially announced as President & CEO of Albuquerque Community Foundation and New Mexico Community Trust, and begins her leadership on January 1, 2026. This external communications plan focuses on reinforcing her leadership, increasing her visibility, and deepening key relationships in her first six months.

I. Objectives

The primary objectives of this communication plan are to:

- Maintain and strengthen ACF's and NMCT's reputation and credibility during the transition.
- Position Marisa as a trusted, accessible, and visionary leader with the continuation of our mission in serving the community.
- Ensure clarity and consistency of messaging across all external channels through earned and paid media, digital content, print publications, and public engagements.
- Clearly articulate the vision for the future under the new leadership, emphasizing continuity and growth.

II. Key Messages & Tone

The following core messages should be integrated into all external communications:

1. **Grounded Leadership and Deep Roots:** Marisa's story is a New Mexico story. Her leadership is rooted in humble beginnings and in the borderlands of New Mexico. From Mesquite to Albuquerque, she carries with her the lessons of small-town

strength: power of place, collaboration and the boundless possibility of what New Mexicans can achieve together.

- a. **Tone:** Reflective, grounded, and bold.
2. **The Power of Community Foundations:** Community foundations are engines of transformation, connecting people, purpose, and possibility. ACF and NMCT remain committed to its mission, vision and values.
 - a. **Tone:** Energizing, inclusive and mission-driven.
3. **Courageous Vision for New Mexico:** Marisa leads with optimism, facing tough issues with love, courage, strategic focus, and creativity.
 - a. **Tone:** Inspirational, confident and human-centered.
4. **Connection, Collaboration, and Creativity:** Change happens through authentic connection and creating a place where everyone feels welcomed, valued, and part of the solution. Inclusion is not just value, it's a daily practice in how we work, listen and lead.
 - a. **Tone:** Hopeful, collaborative.
5. **Leadership Philosophy: Service, Stewardship, and Storytelling:** True stewardship blends accountability with heart, and sharing stories of impact, not just the data.
 - a. **Tone:** Thoughtful, credible and compassionate.
6. **Vision for the Future:** Grounded in decades of service, the Foundation will use its unique bird's-eye view of the community to guide bold, long-term strategy, connecting resources, partners and donors to strengthen our community.
 - a. **Tone:** insightful, strategic and optimistic

III. Key Talking Points

The following talking points should be integrated into Marisa's speeches, public engagements, interviews, etc.

1. **Grounded Leadership and Deep Roots:**
 - a. "I lead with humility and gratitude, grounded in my New Mexico roots From Mesquite to Albuquerque, my story is a New Mexico story."
 - b. "Growing up in the borderlands taught me the strength and complexity of community and the power of showing up for one another."
 - c. "I carry my upbringing as both compass and commitment to serve all of New Mexico with love, respect, and hope."
 - d. "The work ahead is big, but so is our love for this place. Let's do what New Mexicans do best...dream big, work hard, and create impact together. "
2. **The Power of Community Foundations:**
 - a. "We stand on strong shoulders. Our future depends on honoring that legacy while embracing new ideas and voices."
 - b. "We're more than funders. We're bridge builders, conveners, and catalysts for change."

- c. "This next chapter is about expansion of imagination, of inclusion, of what's possible for community philanthropy. When we activate every tool in our toolbox, we can ignite transformation."
 - d. "The Foundation is a 'big tent' where generosity meets innovation, and where every voice can help shape New Mexico's future.
3. **Courageous Vision for New Mexico:**
- a. "New Mexico's challenges are real, but so is our power to change them."
 - b. "We will face complex challenges like housing, education, and poverty not with fear but with love, hope, and humanity."
 - c. "A prosperous New Mexico means every community, urban, rural, border, and tribal has a voice and a future."
4. **Connection, Collaboration, and Creativity:**
- a. "Our work depends on partnership with donors, nonprofits, government and neighbors alike."
 - b. "We're strongest when we listen deeply, act collaboratively, and dream boldly."
 - c. "Creative philanthropy sparks possibility especially in places that have been overlooked for too long."
5. **Leadership Philosophy: Service, Stewardship, and Storytelling:**
- a. "Stewardship is about more than managing assets, it's about creating meaning and momentum."
 - b. "Our responsibility isn't just financial; it's human. Every dollar, every idea, every connection matters."
 - c. "Storytelling connects data to people, helping all of us see ourselves in the work."
6. **Vision for the Future:**
- a. "Community foundations see the full landscape including community needs, strengths and opportunities. This ultimately creates a unique vantage point for us to drive lasting change.
 - b. "Our next decade of strategy builds on decades of service, using big picture perspectives to create a more resilient community for all of us."
 - c. "With a bird's-eye view, we can connect people, resources and initiatives to create a bigger impact."

IV. Voice and Style for all External Communications

Voice:

- **Authentic & Grounded:** Reflect New Mexico's spirit: humble, proud, and connected to place.
- **Hopeful & Bold:** Speak with optimism and courage; lead with "what if" and "why not us?"

- **Inclusive & Warm:** Invite everyone in; Spanish touches like “¡Adelante!” and “Vamos Juntos” signal openness and emphasize identity.
- **Visionary & Practical:** Blend aspiration with tangible results and accountability.

Stylistic Direction:

- Use **story-driven messages**, open messaging with people and follow with successes and potential for growth.
- Anchor in **local imagery** landscapes, faces, community life for cultural authenticity.
- Incorporate **personality with sincerity** by being humorous, kind, confident balanced by humility.

V. Stakeholder Groups and Communication Channels

Communication must be tailored to the specific needs and interests of each external stakeholder group.

Stakeholder Group	Primary Channel	Key Focus/Call to Action	Initial Communication Date
Media/Press	Official Press Release; Media Briefing with CTA; One-on-one interview with Marisa & Randy; paid advertising through branded content; sponsorship of public media; op-ed.	The Foundation enters a new era focused on connection, creativity, and community impact. The next decade will be defined by growth not just in resources, but in relationships, reach, and results. Through the power of storytelling, the Foundation will shine a light on the people, strategic partnerships, and ideas driving change across New Mexico.	Jan 5, 2026
Donors (See Internal Plan for Key Donor Engagement Opportunities)	End of Year Communications; Website Homepage Update; Email Signature Update; End of Year Newsletter	Reassure donors we remain fully committed to the quality of service and impact our donors and community partners have come to expect. Our work continues without interruption. Looking ahead, we are excited to start	Dec 15, 2025

Stakeholder Group	Primary Channel	Key Focus/Call to Action	Initial Communication Date
		visioning of our strategic plan for the next 10 years, which will guide us in expanding our impact and exploring innovative ways we can serve our communities, while looking toward our 50th Anniversary.	
Government, Corporate Partners	Email from Marisa; Continued one-on-one meetings.	Stress continuity in relationships and commitments. Offer times for one-on-one meetings.	Jan 5, 2026
General Public	Social Media Posts; Website; Video Series; Public Engagements ; Increased engagement on Marisa's social media.	High-level announcement with a link to the official press release and website with more information about Marisa and high-level summary of her vision. CTA to become a Partner in Philanthropy (partner in our work). Marisa to increase her social media presence.	Jan 5, 2026

I. Media & Press

- Print
 - Albuquerque Journal
 - Albuquerque Business First
 - Albuquerque the Magazine
 - Rio Rancho Observer
 - The Paper
 - Valencia County News Bulletin
 - Independent News
 - Corrales Comment
 - UNM Mirage
- Online
 - City Desk ABQ

- The Paper
 - Downtown Albuquerque News
 - Nob Hill News
 - Sandoval Signpost
- Broadcast
 - KRQE
 - KOAT
 - KOB
- Public Media Underwriting
 - KUNM
 - New Mexico PBS
 - KANW
- Radio
 - KOBQ (93.3 FM)
 - KPEK (100.3 FM)
 - KBQI (107.9 FM)
 - KYLZ (101.3 FM)
 - KIVA (1600 AM)
- Podcasts
 - ABQ Accent
 - Leaders of Enchantment
 - City on the Edge
 - KRQE Podcast
- Other
 - Searchlight NM
- National Publications & Podcasts
 - Chronicle of Philanthropy
 - Philanthropy Today
 - Asset Funders Network
 - COF
 - GEO
 - CF Leads

II. Local & National Public Engagements

- Albuquerque Business First Philanthropy Summit Sponsor & Keynote
- Groundworks NM Conference
- Citywide Conferences (look into this)
- AREA Luncheon
- Economic Forum
- Albuquerque Hispano Chamber of Commerce
- GAAR

- Greater Albuquerque Chamber of Commerce
- NAIOP
- NM United (Sponsored Tickets/Tailgate)
- Four-Counties (Valencia, Torrance, Bern, Sandoval)
- National Engagements
 - Grantmakers for Effective Organization Conference
 - Lifting up New Mexico work nationally with partners (panels, speaking engagements)
 - COF Place-Based Conference
 - NAP
 - HIP

VI. Communication Timeline and Deliverables

This timeline outlines the planned release of communication assets.

Timeline Phase	Description	Key Deliverables	Responsibility
November - December 2025 (Internal Prep)	Finalize all messaging, Q&A documents, and communication materials.	Finalize Talking Points; Finalize FAQ and Brand Manual; President & CEO Bio/Headshot; Media List; Website Updates; Solidify Public Engagement Opps; Solidify Big 2026 Sponsorship Opportunities Outreach	Marketing & Communications (Mar/Comms) Team
Ongoing	Donor Engagement Strategy	See Internal Plan for Donor Engagement	Mar/Comms Team, Executive Team, Development Team
January	Proactive Public Media Outreach Starts; Marisa featured prominently in ongoing Foundation activities.	Press Release Distribution, Speaking Engagements, Interviews Scheduled, Paid Media Moving, Earned Media Moving	Mar/Comms Team, PR Agency
February - June	Messaging Continues	Social Media Campaign Begins in February	Mar/Comms Team

Timeline Phase	Description	Key Deliverables	Responsibility
June	Mid-Year Update	Video Recapping First 6-months	Mar/Comms Team, PR Agency

VII. Tools and Resources

This plan includes:

- Official Press Release
- FAQ Document
- Brand Guide
- Social Media Messaging Guide
- Bio and High-Resolution Images of Marisa
- Talking Points for Public Engagements/Speeches