

Charting the Course to Transformation: Albuquerque Community Foundation (ACF) & New Mexico Community Trust (NMCT)

In 2026, we will chart a course for the next decade of bold, transformational impact, one defined by innovative impact inspiring deeper, more engaged philanthropy.

Priority Initiative

- Shape a strategic vision and implementation framework that positions ACF & NMCT for bold, sustained community leadership and impact over the next 10 years.

Performance Evaluation

- Lead an organization-wide shift to proactive donor engagement and sustainable asset growth.
- Drive organizational efforts to meet community needs through expanded grantmaking, increasing influence with donors, strengthened capacity-building programs, and visible civic leadership.
- Strengthen the Foundation's people, culture and capacity to support transformational impact and excellent donor services in a high-growth environment.

Performance Evaluation – Overview, Structure & Function

The CEO Performance Measurement Framework is designed to provide the Board with clear, data-informed visibility into the President & CEO's progress toward the Foundation's strategic priorities. It integrates quantitative performance indicators, qualitative evaluation criteria, and structured reporting cycles to ensure accountability, transparency, and alignment with organizational goals.

Each goal area includes a clear objective, measurable performance indicators, evaluation criteria, and a designated oversight structure with sample progress indicators. These components allow the Board to assess both outcomes and leadership effectiveness. Additionally, the 2021 – 2026 current strategic plan objectives are tied to each goal area to demonstrate the connectivity to the current strategic plan.

2026 organization goals correspond to the 2026 Priorities initially shared with the Board. Key measurable components are reflected below and relate to my [Q1 90-day plan](#). These goals will serve as the mechanism for the Executive Committee to determine the Bonus Pool based on the new Bonus Pool program.

The core assumption is that ACF & NMCT are working in concert to achieve these goals.

Deepening a Culture of Engaged & Proactive Philanthropy

2021- 2026 Strategic Plan Goal(s):

*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.*

2026 Goals

By December 31, 2026, lead an organization-wide shift to proactive donor engagement and sustainable asset growth.

Implement a proactive, relationship-centered donor engagement model that ensures fundholders and donors receives timely, personalized communication and meaningful, differentiated touchpoints.

Performance Indicators:

1. A minimum of 10% increase of the 5-year average in total contributions of new and expanded gifts
2. A minimum of 10% increase of the 5-year average of new funds established
3. 100% of living fundholders and Heritage Society members assigned relationship managers.
4. Customer service survey implemented with baseline satisfaction metrics.
5. Three-year endowment growth strategy delivered by Q2 and implementation initiated by Q3 2026, with a focus on strengthening our professional advisor program.

Accountability & Reporting: *Provide dashboards to the Advancement Committee and Board of Trustees on pipeline, engagement and progress to targets;*

Oversight: *Marketing & Development Sr. Director*

Evaluation Criteria:

- Growth in donor engagement and retention.
- Implementation quality of the relationship management model.
- Effectiveness of endowment strategy, professional advisor relations and donor communications.

Mobilizing Innovative Solutions to Community Needs

2021- 2026 Strategic Plan Goal(s):

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

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.

2026 Goals

By December 31, 2026, lead an organizational effort to meet community needs through increased grantmaking, influence, capacity building, and visible civic leadership.

Implement a proactive, impact-driven model that strengthens partnerships, expands community resources, and demonstrates the Foundation's leadership in advancing collaborative solutions, establishing the Foundation as a trusted thought-leader in philanthropy, collaboration and community impact.

By increasing our visibility impact, we will attract new donors, engage partners, and showcase results in ways that inspire confidence and investment. Storytelling also humanizes the Foundation's work, connecting data and mission to real community outcomes. Together, these efforts build the Foundation's reputation as *the community's foundation*: trusted, responsive, and deeply connected to the people and issues it serves.

Performance Indicators:

1. **Grantmaking Growth:** Increase total grants disbursed by 10% increase of the 5-year average
2. **Leverage & Influence:** Approve a standardized leverage ratio methodology by Q1; establish baseline by Q4
3. **Capacity Building:** Deliver two capacity building initiatives through funding and/or programming partnerships. Track outcomes, participants and communities served.
4. **Two High-Impact Initiatives to Milestone:** Convene two civic leadership initiatives to clearly defined milestones by Q4. Track outcomes, dollars leveraged, and communities served.

Accountability & Reporting: Provide dashboards to the Community Impact Committee & Board (grant growth, leverage ratio, initiatives).

Oversight: Community Impact & Leadership Sr. Director

5. **Public Visibility & Storytelling:** Secure 5 positive earned media placements or speaking features; publish 3 issue briefs/impact stories; and host 4 high-visibility events/convenings.

Accountability & Reporting: Provide dashboards to the CEO

Oversight: Marketing & Development Sr. Director

Evaluation Criteria:

- Measurable community partnerships and influence as evidenced by cross-sector collaboratives, centering residents with lived experience.
- Board perception of ACF/NMCT visibility and credibility.
- Quality and results of partnerships supporting key initiatives.
- Increased community visibility

Building Organizational, Culture, Capacity & Sustainability

2021- 2026 Strategic Plan Goal(s):

*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.*

2026 Goals

By December 31, 2026, strengthen the Foundation’s people, systems, and culture to support scalable impact.

Implement a high-performance operating model that fosters collaboration, professional growth, accountability, and sustainability, ensuring the Foundation’s structure, talent, and processes are aligned to sustain long-term growth and mission impact.

Performance Indicators:

1. **Culture & Retention:** Achieve $\geq 85\%$ favorable scores on the staff engagement survey.
2. **Financial Stewardship:** Deliver a balanced operating budget, and an audit with no significant findings.
3. **Fee for Service Revenue:** Meet the 2026 NMCT budget amount
4. **Operational Excellence:** Implement 2 cross-functional process/system improvements (e.g., CRM, grants, finance); document standard operating practices for 10 core workflows.
5. **Talent & Structure:** Fill 100% of roles in the staffing plan on timeline; launch 1 wellness initiative and a competency-based professional development program with 100% staff participation.

Accountability & Reporting: *Provide quarterly dashboards to the CEO, Finance Committee, Executive Committee & Board (as appropriate based on oversight) covering hiring, engagement, retention, process KPIs, and financial results.*

Oversight: CFO

Evaluation Criteria:

- Strength and resilience of internal culture.
- Operational and financial efficiency.
- Staff satisfaction, retention, and development outcomes.
- Board confidence in management capacity and sustainability.