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## MEMO

**To:** Executive Committee, Board of Trustees  
**From:** Marisa Magallanez, President & CEO  
**Date:** March 20, 2026  
**Re:** 2026 Organizational Goals Progress Dashboard

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I am pleased to share the attached 2026 Organizational Goals Progress Dashboard, which reflects early progress across our three priority areas: Engaged & Proactive Philanthropy, Mobilizing Innovative Solutions, and Organizational Capacity, Culture & Sustainability.

Overall, we are off to a strong start in Q1, with the majority of key metrics currently “On Track.” Q1 has appropriately focused on establishing systems, staffing, and planning that will enable stronger execution and more measurable outcomes in the quarters ahead.

### **Engaged & Proactive Philanthropy**

Progress in this area has centered on building the infrastructure necessary to support long-term growth. This includes preparations for a customer service survey (execution in Q2) and full assignment of relationship managers across our donor portfolio.

Key initiatives are progressing according to timeline, with increased coordination in donor communications, outreach strategy, and more intentional donor engagement by the President & CEO and Development Team. The Vice President of Development search is approximately two weeks behind the original timeline, as we have taken additional time to ensure strong internal alignment and clarity around the role to support long-term success.

### **Mobilizing Innovative Solutions**

We are advancing communications, capacity-building and civic leadership efforts as anticipated. Current capacity building initiatives include the Catalyst Fundraising Collective and a Governance Cohort (in partnership with the Anderson Foundation). In

development are a data and storytelling initiative and a multi-pronged effort focused on expanding nonprofit access to capital.

In terms of civic leadership, our efforts remain intentionally focused on smaller-scale activities as we align with the strategic planning process. One exception is early-stage planning for Census 2030, where the Foundation is expected to play a continued anchor role. In Q1, we also supported statewide funder coordination and will host a small convening with UNM College of Arts & Sciences faculty.

The team is maintaining discipline around long-term commitments ahead of the strategic planning process. Outreach to key community leaders and partners is laying important groundwork for expanded civic leadership.

NMCT intermediary work continues to develop at a strong pace, with new grant programs from national partners in development, along with a contract extension for with NM Department and Administration in process.

## **Organizational Capacity, Culture & Sustainability**

We have made meaningful progress in strengthening internal infrastructure, including adoption of a balanced FY26 budget, key staffing transitions, and systems and internal communications improvements.

Several initiatives, such as the staff engagement survey and standard operating procedure documentation, are intentionally sequenced for later in the year to align with audit completion and Denise's full transition into the operations side of her role, upon hiring a VP of Development.

Our intentional culture and change management work has resulted in improved internal alignment across the team, with a clear focus on communication, culture, and decision-making clarity.

## **Looking Ahead**

Across all priority areas, Q1 progress is appropriately weighted toward planning, hiring, and system-building. We anticipate more visible, outcome-based progress in Q2 and Q3 as these elements begin to translate into measurable results. Additionally, several metrics

will become more meaningful as financial and operational data develop over the course of the year.

## 2026 Organization Goals - Progress Dashboard

As of March 20, 2026

Strategic Goal Area	Objective	Key Metrics	Status	Progress (%)	Notes
<b>Engaged &amp; Proactive Philanthropy</b>	Lead an organization-wide shift to proactive donor engagement and sustainable asset growth.	Increase total contributions by 10% from the 5-year average	Not Started	0%	YTD reporting to begin in April for Q1
		Increase total new funds by 10% from the 5-year average	Not Started	0%	YTD reporting to begin in April for Q1
		100% of living fundholders and Heritage Society members assigned relationship managers.	On Track	100%	Completed 1/30/26
		Customer service survey implemented with baseline satisfaction metrics.	On Track	25%	Survey contract signed 1/30/26. Implementation - Donor & Grantee contact info. and survey questions due to contractor by 4/15/26. Survey sent by 5/1/26. Data expected July-Aug. 2026.
		Three - year endowment growth strategy delivered by Q2 and implemented by Q3 2026.	On Track	15%	Professional Advisor and Current Donor plan in progress as first phase
<b>Mobilizing Innovative Solutions to Community Needs</b>	Meet community needs through increased grantmaking, influence, and civic leadership.	Increase total grants disbursed by 10% increase of the 5-year average	Not Started	0%	YTD reporting to begin in April for Q1
		Approve a standardized leverage ratio methodology by Q1; establish baseline by Q4	On Track	25%	Defined by Fidelity, standards and tracking in place through Community Suite and Fidelity grant program indicators
		Deliver two capacity building initiatives through funding and/or programming partnerships.	On Track	25%	Catalyst Fundraiser Collective & Governance Cohorts in progress, Data & Storytelling Training & Nonprofit Access to Capital programs in development.
		Deliver two civic leadership initiatives to clearly defined milestones by Q4.	On Track	25%	UNM Arts & Sciences Faculty Convening, Statewide Funders coordination, Census 2030 initiatives all underway.
		Secure 5 positive earned media placements or speaking features; publish 3 issue briefs/impact stories; and host 4 high-visibility events/convenings.	On Track	25%	Initial communications plan for introduction of the new CEO is well underway.
<b>Organizational Culture, Capacity &amp; Sustainability</b>	Strengthen people, systems, and culture to support scalable impact.	Achieve ≥85% favorable scores on the staff engagement survey	Not Started	0%	YTD reporting to begin in April for Q1
		Deliver a balanced operating budget for 2026	On Track	100%	2026 Balanced Budget was approved in Q4 2025.
		Deliver an audit with no significant findings	On Track	15%	As of 3/20/2026, PBCs are on track. Field work will begin first week of April.
		Meet the 2026 NMCT budget amount for fee for service revenue	Not Started	0%	YTD reporting to begin in April for Q1
		Implement 2 cross-functional process/system improvements (e.g., CRM, grants, finance)	On Track	50%	Bamboo/HR/Payroll system conversion is complete.
		Document standard operating practices for 10 core workflows.	Not Started	0%	This is scheduled to begin after the audit is complete.
		Fill 100% of roles in the staffing plan on timeline	Off Track	50%	Compliance Office is hired, VP of Development is two weeks behind schedule
		launch 1 wellness initiative and a competency-based professional development program with 100% staff participation.	On Track	25%	Wellness initiative(s) has been finalized. Professional development program will begin in Q2