

# ACF/NMCT CEO Transition Report: February 2026

Submitted by: Marisa Magallanez, President & CEO

This document is intended to provide the Board with a high-level summary of activities during February 2026, related to goals and activities outlined in the 30-60-90 day plan.

## 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. Vision & Strategic Direction

## First 90 Day Objectives with Key Activities

- Establish process & timeline for updating strategic plan (Marisa)
  - **95% Complete.** The timeline for the strategic plan process has been developed, and the work is expected to launch in June. A strategic plan working group will be established in Q2.
- Finalize RFP for Strategic Plan Consultant & Distribute (Marisa)
  - **95% Complete.** The RFP is complete, and a consultant list has been developed. The RFP will be distributed no later than March 6. A consultant is expected to be in place no later than the end of April.

- Check-in on goals progress - Q1 (Leadership Team)
    - **100% Complete.** Dashboards and individual goals have all been created. Progress will be monitored throughout the year.
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## 2. Deepening a Culture of Engaged & Proactive Philanthropy

### Transition Period Objectives with Key Activities

- Identify all key relationship managers in organization (Denise)
    - **100% complete.** Major Gifts Officer Melody Wells is leading the transition to a portfolio-based donor management system. Portfolio managers have been identified, and implementation is underway.
  - Ensure 100% of all living fundholders are assigned a relationship manager (Denise)
    - **100% complete.** Related to the objective above, all living fundholders have been assigned a relationship manager, along with an initial structure of communication cadence. Additionally, improvements to our internal processes for tracking donor engagements and communications have been made.
  - Establish KPI Dashboard for key metrics related to Development (Denise)
    - **75% complete.** Denise has created a development dashboard, modeled on peer community foundation practices. The dashboard has been presented to the Advancement Committee for review.
  - First Draft of written, three-year endowment growth plan (Melody)
    - **Not Started.** This work will begin in March 2026.
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## 3. Mobilizing Innovative Solutions to Community Needs

### Transition Period Objectives with Key Activities

- Establish KPI Dashboard for key metrics related to Impact & Leadership (Khia)
  - **30% complete.** A dashboard is underway, with key metrics for ACF & NMCT grantmaking.
- Identify two capacity-building initiatives, partnerships or funding opportunities for implementation in 2026 (Khia)
  - **50% complete.** The Catalyst Fundraising Collective is underway, with additional capacity-building initiatives and partnership opportunities currently in development for 2026.
- Identify two civic leadership initiatives, partnerships or funding opportunities for implementation in 2026 (Khia)

- **15% complete.** Early exploration and partner engagement are underway to inform potential initiatives, partnerships, and funding opportunities for 2026. Initial areas of focus include a social sector advocacy strategy, formation of a statewide philanthropy council to liaise with the Governor's Office, early planning for Census 2030, and development of statewide pooled funds for capacity building investments.
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## 4. Building Organizational, Culture, Capacity & Sustainability

### Transition Period Objectives with Key Activities

- Implement one new staff wellness initiative (Marisa)
  - **100% complete.** We have implemented a new summer Friday schedule and established optional staff reflection gatherings, based on staff feedback for more intentional reflection.
- Implement one New Internal Communications method (Marisa)
  - **100% complete.** Launched a new internal newsletter and a biweekly Monday Message from the President & CEO to strengthen organizational communication and alignment.
- Hold "Hello, 2026" All-Staff Orientation (Marisa)
  - **100% complete.** This was completed on 1/27/26. A group of staff created the agenda and led various segments for the orientation.
- Establish critical parameters, expectations & agreements for organizational excellence (Marisa)
  - **60% complete.** Continued development of team working agreements and individual goals, and intentional culture-building, facilitated by an outside consultant.
- Define cadence & scope of change management coaching for all-staff (Marisa)
  - **100% complete.** Nick and Marisa have finalized the scope of work for change management/consulting with McMillan works. Work began in March and will be ongoing.
- Implement one new staff recognition initiative (Marisa)
  - **50% complete.** The Leadership Team is developing several staff recognition initiatives, to be launched in Q2, ranging from more consistent recognition to more formal programs. In February, Marisa launched a new program focused on small "ripple-effect" peer recognition and acts of kindness called "Just Because."
- Establish Org Chart with Key Responsibilities (Marisa)
  - **100% complete.** This is complete and has been shared with the Board of Trustees.

- Ensure Leadership Team has professional development plans in place (Marisa)
  - **100% complete.** Professional development plans are in place for each member of the Leadership Team.
- Implement new internal meeting structure & schedule (Marisa)
  - **100% complete.** All staff, Leadership Team and cross departmental meeting schedules are in place.
- Ensure all open positions have job postings and are on track to be filled by deadlines (Marisa)
  - **70% complete.** The hiring process is underway for the Compliance Officer position, with an offer expected by the second week of March. The VP of Development position will post no later than March 20.
- Ensure all PBC deliverables are outlined and on track for a successful audit (Nick)
  - **100% complete.** All PBCs have been outlined and assigned to the appropriate Finance staff member. Monthly audit meetings are scheduled. The Finance team is working towards a 3/27 deadline for all PBCs.
- Develop cultural assessment survey (McMillan Works, Marisa)
  - **10% complete.** Initiated planning with McMillan Works to develop a cultural assessment survey. Implementation is targeted for Q2 to establish baseline data and organizational benchmarks.
- Establish KPI Dashboard for key metrics related to Fee for Service Revenue (Nick)
  - **75% complete.** Development of a KPI dashboard for Fee-for-Service revenue is nearing completion. A confidence-level pipeline and five-year comparative analysis have been established to support forecasting and performance tracking.
- Establish internal communications plan for alignment and progress (Marisa + Denise)
  - **100% complete.** New internal communication channels have been established, including standing CEO and Transition updates. The Leadership Team is coordinating key organization-wide messaging, and the staff working group supports two-way communication and alignment across the organization. Additionally, a new internal staff newsletter has been developed, along with bi-weekly messages from Marisa.
- Define at least four SOP improvement areas (Nick)
  - **100% complete.** Identified four priority SOP improvement areas, including fiscal sponsorship processing, grant approval coordination between Finance and Impact (with defined timelines), salary approval process improvements, and a streamlined letter-signing workflow. Implementation is ongoing.

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## 5. Stakeholder Engagement

### Transition Period Objectives with Key Activities

- Identify at least 20 statewide relationships to build over first 12 months as CEO (Marisa + Executive Committee + Leadership Team)
    - **80% complete.** Marisa continues to develop the stakeholder engagement list with the support of Trustees and other networks. This list is ever-growing, and now at 180+ individuals. More information can be found here:
      - [Transition Plan - Board Reports](#) (Stakeholder Engagement Tracker tab)
  - Engage in a minimum of nine donor engagement meetings by the end of Q1 (Marisa + Leadership Team)
    - **77% complete.** Initial donor engagements include donors from Las Campanas (Tobiason and Sibley), Nancy Croker & Joe Gorvetzian, support for the NM Gay Men's Chorus organizational fund, Frank Fine & Leslee Richards, Jo Stein, and Claire Dudley Chavez.
  - Engage in a minimum of 12 key stakeholder meetings by the end of Q1 (Marisa + Leadership Team + Executive Committee)
    - **100% complete.** Marisa has met with 29 stakeholders between January and February. More information can be found here:
      - [Transition Plan - Board Reports](#) (Stakeholder Engagement Tracker tab)
  - Host at least two open house events to connect to key stakeholder groups as the new CEO by the end of Q1 (Marisa + Nick + Denise)
    - **Ongoing.** Four open houses are scheduled between February - April, focused on key groups including Past & Current Trustees, Donors/Fundholders, Heritage Society Members, Professional Advisors and Nonprofit & Community Partners.
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## 4. Public Relations & Community Visibility

### Transition Period Objectives with Key Activities

- Secure a minimum of one Local Profile related to the new CEO (Marisa + Executive Committee + Leadership Team)
  - **100% complete.** Profiles were secured in the Albuquerque Journal, Albuquerque Business First, UNM News and Albuquerque the Magazine, with additional features forthcoming.
- Execute "Message from the new CEO" - stakeholder communications series (Marisa + Leadership Team)
  - **Ongoing.** Ongoing implementation of the "Message from the CEO" stakeholder series, distributed on a bi-monthly basis to provide updates and reinforce strategic priorities. This is distributed to stakeholders including donors, grantees, partners and community leaders.
- Minimum of one National Profile (Marisa + Leadership Team + Executive Committee)
  - **25% complete.** Marisa has been invited to appear as a guest on several philanthropy related national podcasts featuring community foundation CEOs,

supporting the Foundation's national profile and thought leadership. ([Give Better](#), [Get Better](#) and speaking engagements underway with Council on Foundations and Hispanics in Philanthropy)

- Launch a refreshed narrative around “The Community’s Foundation” (Marisa + Nick + Denise)
    - **Not Started.** Planning will begin in March to develop and implement organizational communications that reinforce the “The Community’s Foundation” narrative.
  - Attend a minimum of six Community Events (Marisa + Denise + TT)
    - **75% complete.** Marisa attended 17 community events in January/February, with additional engagements scheduled to continue strengthening community presence and relationships. More information can be found here: [Transition Plan - Board Reports](#) (Community EventsTracker tab)
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## 7. Board Engagement & Alignment

### Transition Period Objectives with Key Activities

- Check in with new Trustees to ensure successful onboarding (Marisa + Executive Committee + Leadership Team)
    - **20% complete.** Initial informal check-ins have been conducted with new Trustees, with full onboarding outreach to be completed by the end of March.
  - Execute Successful Board Forum & Strategy Session (Marisa + Leadership Team)
    - **100% complete.** The Board Forum and Strategy Session was completed February 27, 2026.
  - Determine evaluation process & timeline for CEO (Marisa + Leadership Team + Executive Committee)
    - **40% complete.** A revised CEO evaluation process and timeline are being developed (led by Michelle Dearholt) and are currently under review by the Executive Committee.
  - Q1 - Board Feedback to CEO (Marisa)
    - **33% complete.** Informal feedback has been gathered from the Board Chair, Executive Committee, and Transition Team following the first 30 days. Overall feedback has been very positive, with an emphasis on maintaining schedule balance and leveraging support as needed.
  - Connect with each board member on development participation for 2026-2027 (Marisa + Denise + TT)
    - **Not Started.** This item is on hold until Q2.
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## 8. CEO Professional Development & Learning

### Transition Period Objectives with Key Activities

- Complete at least three executive coaching sessions with Clotilde Dedecker (Marisa + Executive Committee + Leadership Team)
    - **66% complete.** January and February sessions have been completed, with regular sessions occurring monthly.
  - Connect with at least two Community Foundation leaders nationally (Marisa + Leadership Team)
    - **100% complete.** Connected with community foundation CEOs through the Southwest CEO group, along with Betsy Constantine, CEO of Community Foundation of Greater Buffalo. Outreach and relationship building is ongoing.
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