



MEMO

To: Executive Committee, Board of Trustees

From: Marisa Magallanez, President & CEO

Date: May 22, 2026

Re: 2026 Organizational Goals Progress Dashboard as of April 30, 2026

I am pleased to share the attached 2026 Organizational Goals Dashboard, which shares progress through April 30, 2026 across our three priority areas:

- Engaged & Proactive Philanthropy
- Mobilizing Innovative Solutions
- Organizational Capacity, Culture & Sustainability.

Key areas of impact included a strong focus and prioritization on community experience and customer service in response to Trustee feedback and direction; the resignation of our Major Gifts Officer; and several important wins, including the selection of our strategic planning consultant, continued progress on the VP of Development search, and receipt of a \$10M estate gift.

Please note – several updates have been included as of June 18, 2026

Engaged & Proactive Philanthropy

The Foundation received a \$10 million estate gift, with notification of additional future gifts anticipated, resulting in a strong start to annual contributions. The resignation of the Major Gifts Officer during the ongoing Vice President of Development search has required immediate attention, reorganization of priorities, initiatives, and interim support. Our focus throughout this transition is ensuring continuity of stewardship and that the donor experience remains seamless.

Additionally, our donor and nonprofit experience survey in partnership with the Center for Effective Philanthropy will launch soon, providing valuable insight to help strengthen our community experience efforts.

Updates as of 6/18/26:

We have successfully hired a VP of Development. More information can be found in the corresponding memo.

The Center for Effective Philanthropy survey is currently open, and will close June 19th.

Mobilizing Innovative Solutions

The Foundation's Annual Grant Cycle is now complete, and capacity building efforts continue, with planning for the Professional Services Fund underway, anticipated to launch this August with over \$600,000 raised to date. The team is also advancing several innovative initiatives related to nonprofit access to capital, including the development of the Kellogg/Nusenda/ACF pilot program focused on nonprofit lending related to reimbursable public contracts.

Efforts to strengthen organizational visibility and community presence also continue through expanded social media collaboration and strategic partnerships, including community engagement opportunities with New Mexico United and the Indian Pueblo Cultural Center throughout their 50th anniversary celebration (IPCC).

Organizational Capacity, Culture & Sustainability

Community Experience & Customer Service

We are actively addressing both immediate feedback and longer-term system improvements. This includes strengthening SOPs, clarifying service standards, and reinforcing expectations around responsiveness, accountability, and communication. More information can be found in the specific memo and report on this initiative.

Development Function Transition

With leadership transition in progress, we are prioritizing continuity of donor relationships, maintaining engagement with key fundholders, and ensuring momentum in key fundraising

initiatives like Rooted Together, while continuing to implement our portfolio relationship management initiative.

Looking Ahead

Over the next quarter, key areas of focus include:

- Advancing the strategic planning process with Public Equity Group
- Completing key development infrastructure improvements, including relationship management, CRM improvement and increased stewardship activities
- Establishing baseline data and ongoing measurement for community experience
- Continuing to strengthen organizational systems and culture to support long-term sustainability

2026 Organization Goals - Progress Dashboard

As of April 30, 2026

Strategic Goal Area	Objective	Key Metrics	Status	Progress (%)	Notes
Engaged & Proactive Philanthropy	Lead an organization-wide shift to proactive donor engagement and sustainable asset growth.	Increase total contributions by 10% from the 5-year average, to \$8,589,102	On Track	144%	\$12,343,350 as of 4/30/26
		Increase total new funds by 10% from the 5-year average, to 38	On Track	39%	15 as of 4/30/26
		100% of living fundholders and Heritage Society members assigned relationship managers.	Needs Attention	100%	Completed 1/30/26, however reorganizing due to vacancies.
		Customer service survey implemented with baseline satisfaction metrics.	On Track	50%	In process, survey to launch May 26.
		Three - year endowment growth strategy delivered by Q2 and implemented by Q3 2026.	Needs Attention	15%	Professional advisory strategy continued, revisit plan in Q3 with new VP of Development.
Mobilizing Innovative Solutions to Community Needs	Meet community needs through increased grantmaking, influence, and civic leadership.	Increase total grants disbursed by 10% increase of the 5-year average, to \$9,613,290	On Track	39%	\$3,769,245 as of 4/30/26
		Approve a standardized leverage ratio methodology by Q1; establish baseline by Q4 - 2.99:1 ratio	On Track	25%	This ratio was defined in consultation with experts via our Fidelity grant, 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	33%	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	33%	UNM Arts & Sciences Faculty Convening, Statewide Funders coordination, Census 2030 early stage planning
		Secure 5 positive earned media placements or speaking features; publish 3 issue briefs/impact stories; and host 4 high-visibility events/convenings.	On Track	50%	Features in ABQ Business First, Better Get Better Podcast, ABQ the Magazine, UNM Newsroom. NM Estate Planning Conference, Series of 5 Meet & Greets complete.
Organizational Culture, Capacity & Sustainability	Strengthen people, systems, and culture to support scalable impact.	Achieve ≥85% favorable scores on the staff engagement survey	Off Track	0%	Customer Experience work took major focus in April/May. This is now slated for Q3.
		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	75%	The audit is on track to be delivered to the board for approval 6/24/26. No findings have been discovered at this point.
		Meet the 2026 NMCT budget amount for fee for service revenue, to \$1,293,586	Needs Attention	8%	\$105,006 as of 4/30/2026 - lagging due to payment schedule and timing.
		Implement 2 cross-functional process/system improvements (e.g., CRM, grants, finance)	On Track	50%	Bamboo/HR/Payroll system conversion is complete. Customer Experience Action Team formed for continual systems improvement.
		Document standard operating practices for 10 core workflows.	On Track	15%	Customer Experience Action Team established for SOP documentation. More detailed found in Experience & Service report
		Fill 100% of roles in the staffing plan on timeline	On Track	100%	Compliance Office is hired, VP of Development is two weeks behind schedule, but progressing through screenings and first round of interviews. 6/17/26 Update: The VP of Development has been hired successfully, the search is now closed.
		launch 1 wellness initiative and a competency-based professional development program with 100% staff participation.	On Track	33%	Wellness initiative(s) has been finalized. Professional development program development will begin in June of Q2.