

ACF/NMCT CEO Transition Report: March & April 2026

Submitted by: Marisa Magallanez, President & CEO

This document is intended to provide the Board with a high-level summary of activities during March and April 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
-

1. Vision & Strategic Direction

- Select Strategic Plan Consultant (Marisa)
 - **95% Complete.** As of May 4, reference checks for the strategic plan consultant are underway. The Executive Committee will be notified no later than May 8.
- Finalize Contract for Strategic Plan Consultant (Marisa)
 - **Not Started.** This will begin after the consultant is selected. Estimated start - week of May 12.
- Develop initial work plan for strategic plan process and key milestones
 - **Not Started.** Will begin after the consultant is selected. Estimated start - June.
- Establish Strategic Plan Working Group

- **Not Started.** Will begin after the consultant is selected, with review during the May Executive Committee meeting.
 - Check-in on goals progress - Q2 (Leadership Team)
 - **Ongoing.** Dashboards and individual goals have been established. Progress is reviewed monthly with the leadership team and reported to relevant Board committees and the Executive Committee, as appropriate.
-

2. Deepening a Culture of Engaged & Proactive Philanthropy

- Launch organization-wide relationship management system with active fundholder outreach. (Denise)
 - **Ongoing.** Major Gifts Officer Melody Wells is leading the transition to a portfolio-based donor management system. Portfolio managers have been identified, outreach and engagement standards established, and staff training and implementation is currently underway.
 - Finalize and operationalize the three-year endowment growth plan with clear fundraising targets. (Denise)
 - **33% complete.** The professional advisor component of the plan has been established and is underway. The Development team is focused on endowment growth strategies with existing and near-network prospects. Additional impact-related activities will be further developed following completion of the strategic plan.
 - Initiate priority donor engagement strategies and cultivation plans for top prospects (20 - 40 priority fundholders) (Denise)
 - **25% complete.** Advancing priority fundholder engagement, with an action plan to contact all phase 1 donors regarding grantmaking activity by the end of Q2.
 - Implement KPI dashboard with monthly development performance review. (Melody)
 - **Ongoing.** Dashboards and individual goals have been established. Progress is reviewed monthly with the leadership team and reported to relevant Board committees and the Executive Committee, as appropriate.
-

3. Mobilizing Innovative Solutions to Community Needs

- Operationalize Impact & Leadership KPI dashboard with monthly reporting and board-level summaries. (Khia)
 - **Ongoing.** Dashboards and individual goals have been established. Progress is reviewed monthly with the leadership team and reported to relevant Board committees and the Executive Committee, as appropriate.

- Develop implementation plan & activity for 2nd capacity building initiative (Khia)
 - **Ongoing.** Developing implementation plans and related activities for several capacity-building initiatives: Professional Services Fund, Data & Storytelling, Access to Capital, and Nonprofit BackOffice Services.
 - Expand community engagement through convenings, stakeholder meetings, and partnership development. (Khia)
 - **Ongoing.** Expanded community engagement through continued statewide funder convenings, UNM College of Arts & Science gathering, and an immigration partner convening planned for June, alongside ongoing stakeholder meetings and partnership development
-

4. Building Organizational, Culture, Capacity & Sustainability

- Institutionalize wellness, recognition, and internal communication systems. (Marisa)
 - **Ongoing.** Continued focus on internal communication, assessing effectiveness of new communication methods established in Q1.
- Activate updated org structure and leadership development plans. (Marisa)
 - **Ongoing.** Professional development efforts are focused on strengthening organizational culture, individual coaching, and building core leadership and soft skills across the team, particularly as it pertains to organizational excellence.
- Ensure audit readiness, and PBC deliverables remain on track. (Marisa)
 - **Ongoing.** The audit is progressing well and is currently in the investment review phase, with no issues identified to date.
- Launch Fee-for-Service KPI dashboard with quarterly revenue targets. (Marisa)
 - **Ongoing.** Dashboards and individual goals have been established. Progress is reviewed monthly with the leadership team and reported to relevant Board committees and the Executive Committee, as appropriate.
- Initiate SOP improvement implementation. (Marisa)
 - **Ongoing.** Each department is in process of identifying top areas for system improvement, and root cause analysis is underway for areas raised by the Board of Trustees. An action team has been formed to address this. This is a critical priority of the organization.
- Implement one new staff recognition initiative. (Marisa)
 - **Ongoing.** Building on Q1 progress, the Leadership Team is continuing to develop and implement a range of staff recognition efforts, expanding from consistent, informal recognition to more formal programs rolling out in Q2. The “Just Because” initiative, launched in February, remains an active peer recognition effort highlighting small, ripple-effect acts of kindness.
- Prepare cultural assessment survey. (Marisa)

- **15% complete.** This is in development and expected to launch late Q2/early Q3.

5. CEO Specific Objective: Stakeholder Engagement

- Engage in a minimum of nine donor engagement meetings by the end of Q2. (Marisa + Development Team)
 - **100% complete.** Initial donor engagement target has been met in Q2, but more meetings are planned, with a particular focus on individual meetings with Heritage Society Members. [➤ Transition Plan - Board Reports](#) (Stakeholder Engagement Tracker tab)
- Engage in a minimum of 12 key stakeholder meetings by the end of Q2. (Marisa + Leadership Team)
 - **83% complete.** On track to exceed target by end of Q2. Outside of donor engagement, stakeholder meetings include funders, nonprofits, government officials and community leaders. [➤ Transition Plan - Board Reports](#) (Stakeholder Engagement Tracker tab)
- Connect with NM Gubernatorial Candidates. (Marisa)
 - **Not Started.** Engagement will begin after the primary election.

4. CEO Specific Objective: Public Relations & Community Visibility

- Expand local media engagement with additional coverage and commentary. (Marisa + Marketing & Communications Team)
 - **Ongoing.** Continued CEO visibility through targeted profiles and thought leadership, with an increased focus on elevating the Foundation's work, impact, and community leadership.
- Secure additional national visibility opportunities in the philanthropic sector. (Marisa + Marketing & Communications Team)
 - **Ongoing.** National visibility includes participating in the [Give Better, Get Better](#) podcast, and speaking engagements underway with Council on Foundations and Hispanics in Philanthropy
- Continue the "Message from the CEO" series with targeted stakeholder communications. (Marisa + Leadership Team + Executive Committee)
 - **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.

- Embed the “Community’s Foundation” narrative across communications and storytelling. (Marisa + Marketing & Communications Team)
 - **On Hold.** Communications planning will take place late Q2.
 - Attend a minimum of six Community Events in Q2. (Marisa)
 - **100% complete.** Marisa attended 10 community events in April, with additional engagements scheduled to continue strengthening community presence and relationships. More information can be found here:
[+ Transition Plan - Board Reports](#) (Community EventsTracker tab)
-

7. CEO Specific Objective: Board Engagement & Alignment

- Schedule a Board Dinner for 2026 to encourage relationship building. (Marisa + Executive Committee)
 - **Not Started.** Will be discussed in May Executive Committee Meeting
 - Continue NMCT Committee integration, focusing on Community Impact, Advancement, Finance and Risk. (Marisa + Leadership Team)
 - **Ongoing.** Continued integration across committees, with a focus on aligning priorities and embedding NMCT more fully into ACF board awareness & oversight.
 - Finalize CEO evaluation framework and timeline. (Marisa + Leadership Team + Executive Committee)
 - **90% complete.** A revised CEO evaluation process and timeline are being developed (led by Michelle Dearholt) and are currently under review by the Executive Committee. Michelle is meeting with Marisa for final review.
-

8. CEO Specific Objective: CEO Professional Development & Learning

- Complete at least three executive coaching sessions with Clotilde Dedecker. (Marisa + Executive Committee + Leadership Team)
 - **Ongoing.** Regular sessions occur monthly with Clotilde.
- Connect with at least two Community Foundation leaders nationally. (Marisa + Leadership Team)

- **100% complete.** Connected with community foundation CEOs through the Southwest CEO group, Heidi McPherson, retired CEO of Community Foundation San Luis Obispo County
-