

Serve Connect Support



STRATEGIC PLAN
2019-2021

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SUMMARY

Building on our legacy of leadership and philanthropy, the Community Foundation is poised to positively impact the future of our region. In 2016, the Community Foundation, invested time and resources to understand how to effectively serve the community going forward. The result is the creation of a Vision statement, a refined Mission and a 2017-2019 Strategic Plan. This plan has now been updated and will continue to serve as our roadmap for Mission achievement.

Guided by the Vision of a community connected to the resources it needs to thrive, the Community Foundation is ensuring our energy and resources are aligned with our Mission to SERVE as a community resource, CONNECT donors to needs and SUPPORT charitable organizations in their work.

The Community Foundation will continue to focus its time, talent, and resources on six overarching goals:

- *Strengthening and expanding its identity and role in southern New Mexico, community education and outreach;*
- *Ensuring the continued stewardship of all Community Foundation funds utilizing best practices;*
- *Establishing a more intentional grant process, linking funding priorities to focused outcomes;*
- *Supporting and highlighting nonprofits and their important community role;*
- *Enhancing governance oversight to be more strategic in nature and a model of efficacy; and*
- *Developing a work culture that is directly aligned with the Community Foundation's Mission.*

Our cumulative work towards these goals will make us a stronger and more impactful leader in working to improve the quality of life in southern New Mexico.

MISSION and VISION

The goal is to utilize our refined Mission and Vision to serve as our North Star, our guide to aid in decision-making, so that our policies and actions have focused alignment. It is expected that the refined Mission will also better communicate the role of the Community Foundation in the community.

Our

Mission

We SERVE as a community resource, CONNECT donors to needs and SUPPORT charitable organizations in their work.

Our

Vision

A community connected to the resources it needs to thrive.

METHODOLOGY

Our 2016 strategic planning was a journey designed to inspire, challenge and discover, with the goal of creating a “Roadmap to Mission Achievement” that results in a profound positive impact on the quality of life in southern New Mexico. The process began with due diligence to explore the current landscape within which the Community Foundation operates. Then, after understanding “where we are,” we planned “where we want to go.”

The Board and team, with the support of outside consultant MJD & Associates, LLC, managed the planning process.

The process was developed with the following goals in mind:

- Evaluation of current organizational operations and functions
- Evaluation of the environment in which the Community Foundation operates by seeking feedback for improvement from community stakeholders, Board members, donors and staff utilizing surveys customized for each group
- Identification of strategic issues to move the Community Foundation forward
- Affirmation or refinement of the Mission and development of a Vision statement
- Development of goals that address key issues identified through the process
- Development of a plan for impact and growth over a three-year period.

To facilitate achievement of the above, the following processes and activities were undertaken:

- Review and analyze internal Community Foundation historical documents and processes
- Research community foundation best practices
- Outreach, data collection and analysis of four online surveys (Board, staff, donors and community stakeholders, each surveyed separately)
- SWOT analysis
- Strategic planning session with Board and staff.

These collective activities and the information gathered from each served as the foundation for the 2017-2019 Community Foundation Strategic Plan. This plan has now been a working document for the Board of Directors and team as we continue our work in 2019. The goals remain the same yet there are additional objectives and metrics as we continue the strategic focus until 2021.

KEY FINDINGS and SURVEY HIGHLIGHTS

The Board, staff, donors and community stakeholders responded to online surveys to offer an assessment of and insight to the Community Foundation's performance and our reputation in the community, provide an understanding of needed services and evaluate the current and best role for the Community Foundation in the region. Overall, the surveys had a very strong participation rate, with 45% of surveyed donors and community stakeholders responding.

The surveys were designed to identify strengths, challenges and communication trends and preferences over the next three years. Across all four groups surveyed, numerous commonalities surfaced. Some of these commonalities included:

- The need for more community education and outreach to clarify the identity, role and impact of the Community Foundation (Note: The new leadership team at the Community Foundation's efforts to increase outreach and communication were repeatedly recognized)
- Donor-based fund stewardship should be increased
- Grant-making should have clearer focus
- Nonprofit engagement is desired.

Donor and community stakeholders were asked a range of questions in relation to knowledge of the Community Foundation and awareness of our services. Surveys indicated that over 60% of community stakeholders and over 80% of donors were knowledgeable about the Community Foundation's work, yet, when asked if they felt the community "at-large" was knowledgeable, about 25% of both community stakeholders and donors felt the Community Foundation could do a better job at informing the public about our work and successes.

25% of community stakeholders felt that the Community Foundation was doing a good job, another 25% thought they were improving, while an additional 25% thought the community needed to know more. Conversely, 60% of donors think the Community Foundation is doing a good job, and 20% said they notice the improvement in communicating our role. Additionally, 25% of donors were familiar with articles in the newspaper written by Community Foundation staff and were looking forward to future articles. Both the Board and the staff believe that communication efforts have improved, but additional work is needed to communicate the Community Foundation's role.

77% of donors, 45% of community stakeholders, and 100% of Board members and staff felt favorably about the direction of the Community Foundation, while the majority of the other respondents did not know or did not have an opinion.

1) What role should the Community Foundation play in the community?

31% of community stakeholders stated they felt the Community Foundation should play a role in supporting and increasing awareness of nonprofits. Several board members and donors communicated the need for more focus and impact on urgent community needs.

2) Do you foresee a need for expanded Community Foundation outreach or engagement in the next five years?

An overwhelming majority of all survey respondents answered, “Yes.” Examples cited included the need to continue and expand engagement with donors and beneficiaries, conduct more interaction with community partners and provide more opportunities for “on-the-spot” donations. For example, having pre-printed envelopes that can be left on tables or chairs when the Community Foundation is making a presentation so people have the opportunity to quickly fill out and make a contribution.

Finally, both community stakeholders and donors alike had a high regard for the staff, Board and Executive Director. Staff was cited as being extremely professional and knowledgeable. The Board was recognized for its respected leaders, and one respondent even suggested that Board members should be profiled in the media. The Executive Director was noted as leading the Community Foundation in the right direction, many cited her success in communicating and reconnecting with donors.

2019-2021 STRATEGIC PLANNING GOALS

Several strategic priorities resulted from the planning process. These issues were identified from the due diligence, surveys, interviews and planning sessions, with consideration given to the strengths, challenges and trends identified through the process.

The resulting Strategic Plan provides a roadmap for the Community Foundation to grow and manage our services for the next three years. This plan is designed to focus around six overarching goals. The Board and staff will regularly evaluate our progress and make appropriate adjustments to continue on the journey of realizing our Vision and Mission.

The six overarching strategic goals include:

- Goal 1 - Strengthen and expand the identity, community education and outreach of the Community Foundation.
- Goal 2 - Effectively steward all Community Foundation funds utilizing best practices.
- Goal 3 - Establish a more intentional grant process, linking funding priorities to focused outcomes.
- Goal 4- Support and highlight nonprofits and their community role.
- Goal 5 - Develop governance oversight that is strategic in nature and is a model of efficacy.
- Goal 6 - Develop a work culture that is directly aligned with the Community Foundation's Mission.

GOAL 1: Strengthen and expand the identity, community education and outreach of the Community Foundation.

Objectives	Indicators of success	Start
<p><i>Nonprofits, donors, community partners and community as a whole are more aware of the Community Foundation’s Vision, Mission and impact</i></p> <p>11.18 Board 2019 Additions Bi-monthly newsletter – Staffing does not allow for bi-monthly. Objective would be to develop a quarterly newsletter for 2019 which will be sent to anyone with an email in our donor system.</p>	<p>Create an annual report</p> <p>June 2017 - An infographic annual report was published showing grants and scholarships awarded, gifts and grants received, quotes, board and staff. This is a great start and will be added upon in 2018. Began a bi-monthly newsletter. The 1st newsletter had a strategic plan link with graphic, goals and objectives.</p> <p>November 2017 – Completed 3 newsletters and working on 2017 annual report with endowment earnings report for January 2017.</p> <p>June 2018 – Completed 2017 Annual Report. Mailed annual report and full earnings reports to all donors with information in the system. CFSNM team working on cleaning up the data for 2018.</p>	<p>Q1</p>
<p><i>Increased Board visibility and community awareness of Community Foundation work (scholarships, grants awarded, etc.) in southern New Mexico</i></p> <p>11.18 Board 2019 Additions Leverage Social Media Output – Use targeted demographics to optimize social media reach. Press Release Plan – Share the communications calendar in reference to 2 articles per month in each local publication and additional press releases sent monthly. Connect Social Media to Website – This need to go beyond Facebook embedded within the website. Review other platforms of Social Media – LinkedIn and SnapChat. Board Outreach – Each board member to hold 1 outreach event based on their varied backgrounds or interests.</p>	<p>Publish board profiles and success stories in newspaper, as well as post on social media.</p> <p>June 2017 - We have begun philanthropy Friday and several social media pushes a week. There are also stories in the LC Bulletin and Sun News monthly.</p> <p>November 2017 - April Anaya started in September which we have seen an increased in press releases and social media from once a month to 3 times a week.</p> <p>June 2017 - Board members attended the Jon Wynne DACC reception which was published in the 2nd newsletter. The board visibility piece has not been completed and I would like to begin this process in Q3.</p> <p>November 2017 - Board profiles were completed for Giving Tuesday. New board members will need bios and photos by the end of 2017.</p> <p>June 2017 - More needs to be done regarding press releases and reaching into</p>	<p>Q1, 2</p>

	<p>other counties we serve.</p> <p>Advertisement at Allen Theatres.</p> <p>November 2017 - We are not completing Allen Theatres due to high cost.</p> <p>June 2018 - Monthly articles in the Sun News and the Las Cruces Bulletin. Have had one article in the Deming Headlight and one in TorC. Increased social media to posts at least 3 per week. Began our Instagram and Twitter account. Will be completing board profiles in the remaining 3 months of 2018.</p>	
<p><i>Share impact of the Community Foundation</i></p> <p>11.18 Board 2019 Additions</p> <p>Board Engagement in story telling/sharing –</p> <p>Share these stories with board members in consent agenda as well as tagging them within impact stories on social media and local news press.</p>	<p>Create an inventory of success stories to utilize in annual report</p> <p>Copies of newspaper articles are on the website and success stories appear on both social media and on the website</p> <p>Implement social media into Communications Plan</p> <p>June 2017 - We continue to create an inventory of success stories. The annual report was short and will be expanded on with these stories. Copies of all news articles are now be archived in the office. Terra is reviewing the social media and communications plan which will then be given to the new Director of Development. Philanthropy Friday has focused on individuals and quotes from community members about a non-profit partners, programs or CFSNM as a whole.</p> <p>November 2017- A full inventory of endowment stories was found that were written by Charlotte Tallman. We are in contact with her about reusing pieces for news articles, social media and gala.</p> <p>June 2018 - Implemented all articles within social media. Do not have room to post on our website but will be asking Wilson Binkley on options.</p>	Q1-4
<p><i>Ensure all Board members are knowledgeable and understand the Community Foundation’s Mission and can subsequently serve as ambassadors for the organization</i></p> <p>11.18 Board 2019 Additions</p>	<p>Develop a “Board” education campaign (i.e. 30 second speech, handout)</p> <p>June 2017 - Terra is currently working on a one page handout and PowerPoint presentation for this particular use.</p> <p>November 2017 - This has been completed</p>	Q1

<p>New Member Mentor Program – Each new board member will be mentored by a current board member.</p> <p>General Presentation & Elevator Speech – Each board member will receive this annually.</p>	<p>as of October 2017 but needs final review from board and staff by the end of 2017.</p> <p>June 2018 - New Board orientation notebooks completed. All board members have been orientated and a monthly Did you know board email is going out. An elevator speech (10 bullet points) and general presentation will be shared with the board in July 2018.</p>	
<p><i>Support volunteer opportunities</i></p> <p>11.18 Board 2019 Additions</p> <p>Make sure Board is introduced to CFSNM Interns and Volunteers – This can be done personally or with a photo and short bio in consent agenda.</p> <p>Website Recruitment – Use the website to recruit further volunteers for the organization. What are the needs and where can people help?</p>	<p>Increase number of volunteers</p> <p>June 2017 - The needs of the organization are being reviewed for a possible volunteer program. We want there to be a true need before bringing volunteers into the office. We do however want to build volunteer support for the Gala, EPI, and Arts Sale. There is also a need to have a two to four person intern team in the fall of 2017. These could include a stewardship team to assist with Donor Perfect. Social Media while building Twitter and Instagram. Event Marketing – graphic design elements for each event.</p> <p>November 2017 - We currently have two new office volunteers. There will be a twelve member board and an additional 10 to 15 volunteers for Gala, EPI, and board committees.</p> <p>June 2017 - We have now added a total of three volunteers to our office and two interns. The board is currently at 10 members with roughly 15 to 20 volunteers on Gala, EPI and board committees.</p>	2019

GOAL 2: Effectively steward all Community Foundation funds utilizing best practices.

Objectives	Indicators of success	Start
<p>Conduct “special” projects review 11.18 Board 2019 Additions No updates</p>	<p>Amend special project agreements, fee structure and formalize expectations June 2017 - A new project support application process has been put into place. This needs to be placed online ASAP. A new fee structure has been put in place which also needs to be placed online. Still closing all 36 special projects prior to December 2017. November 2017 - Still in process. 13 have been closed in November. Hearts for Autism has been moved to incubator program. There are currently 3 to 4 remaining. June 2018 - All agreements have been updated as of May 2018. Special projects are being completed and moved as of December 2018.</p>	<p>Q1 Review</p>
<p>Increase stewardship of donors and stakeholders 11.18 Board 2019 Additions Metric based donor engagement – Each member of the team will have a designated donor portfolio in which they will maintain contact. All donations receive a receipt and a handwritten note from the team. The stewardship acknowledgement sheet will be shared with the board twice a year. Corporate Giving – Plan is complete as 11.2018. Brochure being developed for outreach in January 2019. Giving Societies/Future Fund/Social Giving Club/Emeritus Board/Presidents Council – will be developed and implemented in 2019.</p>	<p>Develop a Stewardship Plan, encompassing all current funds, with clear, concise guidelines for implementation June 2017 - There has been nothing completed on this subject. This will be started with new Director of Development as of September 1st. November 2017 - A plan has been developed in Q3. Including special event stewardship. The team is putting together the plan for review prior to 2018. We will be adding planned giving societies and a corporate giving structure as well. June 2018 - Giving societies and the corporate giving package will be implementing in the fall of 2018.</p>	<p>Q1-2</p>
<p>Introduce and engage key community leaders in the Community Foundation’s work 11.18 Board 2019 Additions Corporate Giving – See objective above. Community Leader Conversations – Plan in 2019 and implement in 2020 with the City</p>	<p>Host quarterly Community Leader luncheons June 2017 - There is a large amount of duplication of service on this topic. Terra will be reviewing what is currently happening with hopes of creating something that is beneficial for CFSNM, our</p>	<p>Q2, 2017 DONE</p>

<p>of Las Cruces and roughly 6 to 8 topics.</p>	<p>partners and community. What does leader mean in this context?</p> <p>November 2017 - Collaboration on 2 trainings in Q4 not including EPI and meeting with several nonprofit partners on board development, capacity building and budgeting for 2018. The following are part of the community leader concept – Fiscal Responsibility training November 29 with Pulakos, Board training December 7th with Paso del Norte Health Foundation, Partnership with New Mexico Association for Grantmakers on capacity building statewide, Partnership with Center for Nonprofit Excellence on Nonprofit Book, NM CEO Meeting in January 2018, SW CEO Meeting in April of 2018. There needs to be better clarification on this idea of community leader luncheons in 2018.</p> <p>June 2018 - CFSNM is now involved in the Wellness Institute, Success Partnership, Dona Ana County Health Advisory Committee and will be completing a Nonprofit Summit with several partners in August 2018.</p>	
<p><i>Develop strategies for fund management with current resources</i></p> <p>11.18 Board 2019 Additions</p> <p>No updates</p> <p>It is important for the board to know that fund development in nonprofits discusses the overall fundraising circle not operational budgeting.</p>	<p>Create a Long-Term Fund Development Plan</p> <p>June 2017 - This will begin on September 1st when all new staff is on board. We will have a complete plan to roll out in 2018.</p> <p>November 2017 - The team is completing an annual giving, special event, corporate giving structure and planned giving plan to roll out in 2018. A calendar is being reviewed now within yearly goals and metrics for the team.</p> <p>June 2018 - The plan was developed and voted upon at the May Board of Directors meeting.</p>	<p>Review</p>
<p><i>Create distributable income process</i></p> <p>11.18 Board 2019 Additions</p> <p>Use of Investment Policy – Use variance power if need be to award the distributable income from accounts that have had no contact back to CFSNM.</p> <p>Report Quarterly to BOD – The distribution</p>	<p>Ensure 100% of distributable income is disbursed according to donor wishes</p> <p>June 2017 - This has not been completed and needs to be a high priority beyond fund management</p> <p>November 2017 - CFSNM is currently at 75% distributed.</p>	<p>Continued Process</p>

<p>of funds will be reported to the BOD quarterly.</p>	<p>As of June 2018, 38 nonprofit endowments have been paid earnings or earnings have rolled over, Wellness Grant is being awarded at roughly \$80,000 which constitutes 75+ endowments and roughly 26 scholarships have been awarded of the 30. Goal is to have 100% distributed by the end of the 3rd quarter of 2018.</p>	
<p><i>Ensure donors are informed and aware of fund disbursements</i> 11.18 Board 2019 Additions No updates</p>	<p>Share fund impact June 2017 - There needs to be a succinct collaboration between this objective and the prior two. They need to go hand in hand and currently they are not. November 2017 - Plans are being developed to send endowment reports and stewardship in January 2018. June 2017 - Reports sent in May of 2018. Continued follow up on news articles, personal notes to donors, scholarship breakfast in June and donor awareness posters at the 2018 Gala.</p>	<p>Continued Process</p>
<p><i>Share meaningful and appropriate outcomes with donors</i> 11.18 Board 2019 Additions No updates</p>	<p>Number of communications shared June 2017 - Use of DonorPerfect is imperative. Donor communication is not being tracked accordingly and files are not in good working order. This will be collaborative with prior three objectives. November 2017 - This continues to be an issue. We are working with DonorPerfect to clean the data we have while also mining old lists. We are refining all planned giving lists and board lists in December 2017. June 2018 -This continues to be an issue and we need to look at a good stewardship and follow up.</p>	<p>Continued Process</p>
<p><i>Develop and operate efficient and effective scholarship program</i> 11.18 Board 2019 Additions No updates</p>	<p>Award 100% of all internal and external scholarships and implement new online software for scholarship and grant application submissions June 2017 - A process has been set up but further training needs to be done so that all staff is cross trained. This will be the first year of AwardSpring which needs to be evaluated for 2018. November 2017 - The new online system</p>	<p>2019 Review new options</p>

	<p>has been implemented. We are working to push back the scholarship open dates to January 1 to March 31, 2018 and award in April for communication and celebrations in late April and early May in conjunction with scholarship nights at schools. We currently have 12 of the 30 scholarships un-awarded due to no communication or no student applications.</p> <p>June 2018 - Continuing improvement of the scholarship processes. AwardSpring has allowed us to publicize all 30 scholarships while receiving well over 180 applicants for scholarships. Currently awarded 26 of the 30.</p>	
<p><i>Continue to make the Gala and EPI successful events while supporting overall CFSNM operations.</i> New Goal & Objectives</p>	<ol style="list-style-type: none"> 1. Review operational efficiencies in regards to each fundraising event compared to staff time, volunteer time and true income. 2. Review a 3rd operational fundraiser to assist with operational funding. 	<p>2019</p>
<p><i>Continue Investment Policy that ensures returns at or near benchmark.</i> New Goal & Objectives</p>	<ol style="list-style-type: none"> 1. Quarter Finance and Investment Committee Meetings to review portfolio. 2. Reports within consent agenda for every board meeting. 	<p>2019</p>
<p><i>Construct a 5 year financial plan to review operational income compared to operational expenses.</i> New Goal & Objectives</p>	<ol style="list-style-type: none"> 1. Review all operational budgeting for a 5 year period. 2. Propose plan to Finance and Investment by January 2019. 3. Propose plan to use Board Discretion Funds to support operations for a specific time period. 	<p>2019</p>

GOAL 3: Establish a more intentional grant process, linking funding priorities to focused outcomes.

Objectives	Indicators of success	Start
<p><i>Focus grant-making on a specific social indicator with measurable outcomes</i> 11.18 Board 2019 Additions Design measurable outcome metrics – The grants committee will work together to develop results based evaluation on the Wellness and Palmer grants in 2019.</p>	<p>Adopt policies that dedicate certain funds to a single topic/issue each year(s) for greater community impact June 2017 - Unsure if any policies have been developed or implemented. Still reviewing current files. Does not seem to be any documents of this nature. November 2017 - Wellness Fund 2016 – 2017 has been awarded and we are awaiting reports by January 15, 2018. WKKF 2016-2017 has been awarded and we are awaiting reports by January 15, 2018. Currently updating grantmaking policy and looking to award Devasthali in January 2018. June 2018- Policies have been updated. 2018 Wellness Grant being reviewed. On the second Devasthali cycle. Will be opening the new Dr. Palmer grant cycle. Working on impact reporting for 2017 Wellness and WKKF grant.</p>	<p>Review annually</p>
<p><i>Restructure Community Foundation grant-making cycle</i> 11.18 Board 2019 Additions Review cycle times and the pros and cons to insure proper calendar period – All grant making has be shifted to a July to June award period. This has been completed for the 2019 year. BOD need to understand that this goal is structured for money going out not coming in to CFSNM.</p>	<p>Identify a specific time of year to award Community Foundation grant dollars, offer workshop to area nonprofits and ensure all committee members are trained by a professional grant reviewer June 2017 - This has been completed. Need further implementation on website, press release and review. Scholarship awards need to be set in a timely schedule as well. CFSNM needs to build a full calendar of events for 2018. November 2017 - Revising schedule now – January – March solicitation of applications. Review in April. Award in late April and May. June 2018 - Wellness, Devasthali, and Palmer will be updated for all of 2019 to follow a fiscal year increments.</p>	<p>Review</p>
<p><i>Conduct Community Foundation grant training for area nonprofits</i> 11.18 Board 2019 Additions</p>	<p>Develop workshops that detail Community Foundation expectations of potential grantees</p>	<p>Review</p>

<p>No updates</p>	<p>June 2017 - 1 training was held in mid-June in regards to the Wellness Grant. Will begin to review the Lineberry Foundation and how it will be implemented in 2017. Discuss further application for WKKF funds.</p> <p>November 2017 - Wellness grantees social and check pick up on September 17th Community Fiduciary Responsibility for nonprofits November 29th</p> <p>Board Training in collaboration with Paso del Norte Health Foundation December 7th Will plan additional trainings with Paso del Norte Health Foundation to include 3 trainings in 2018.</p> <p>Additional Wellness Grant training will have within the first to early second quarter of 2018.</p> <p>June 2018 - Added a Palmer and Wellness grant session in May 2018. Working on nonprofit summit in August 2018.</p>	
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GOAL 4: Support and highlight nonprofits and their community role.

Objectives	Indicators of success	Start
<p><i>Nonprofit partners will share success stories with the Community Foundation for increased publicity</i></p> <p>11.18 Board 2019 Additions Nonprofit PR Partnership – Request that nonprofits show their affiliation with CFSNM through their websites, social media and written materials. Create mini videos or PowerPoint Presentations on grantees and nonprofit partners – These will be shared with the BOD at each meeting and on all media outlets.</p>	<p>Feature local nonprofit success in a variety of mediums (written and social media)</p> <p>June 2017 - This process has started but needs to be further refined.</p> <p>November 2017 - We have increased our Facebook presence with more than 3 stories a week. We have also used our Bulletin and Sun News article to share information about wellness grantees, events and our board.</p> <p>June 2018 - We continue to ask nonprofits to promote CFSNM through their grants. We are continuing to story gather. We have also worked with nonprofit conference and tooting our own horn. There has been a matching campaign for CdP and Gospel. We are working on the 2019 giving day.</p>	<p>2019 Continual</p>
<p><i>Create a login for “Library time” at the Community Foundation for nonprofits</i></p> <p>11.18 Board 2019 Additions CFSNM staff has met with all nonprofit endowment holders and grantees. This resource is not needed. Yet we are beginning to provide BoardSource training and other elements to BOD of other nonprofit organizations.</p>	<p>Acquire software and develop user processes</p> <p>June 2017 - I am unsure what this is. Will begin looking.</p> <p>November 2017 - With donations and assistance from our Paso del Norte Health Foundation we are beginning a nonprofit lending library in the CFSNM offices.</p> <p>June 2018 - Looking into a partnership with The Grants Collective. Unsure if our community really needs library time.</p>	<p>2019</p>

GOAL 5: Develop governance oversight that is strategic in nature and is a model of efficacy.

Objectives	Indicators of success	Start
<p><i>Maximize use of Board member time and talent</i></p> <p>11.18 Board 2019 Additions Develop understanding of board backgrounds and use appropriately on committees Develop smaller board orientation trainings for current board members to be used at board meetings.</p>	<p>Review all policies, beginning with governance policy, to align with goals and Mission</p> <p>June 2017 - This is being worked on and will be completed by the end of 2017.</p> <p>November 2017 - All policies will be approved and completed by 12.31.2017. Seven policies were completed in Q3. We are beginning to develop an employee handbook and procedure notebook that will be complete by March 31, 2018.</p>	<p>Review</p>
<p><i>Provide clarity of roles and responsibilities of Board members</i></p> <p>11.18 Board 2019 Additions Annual review of CFSNM Activities – Develop a way to show current successes and possible successes with board help. Document board nominating and board orientation process Complete a Bi-Annual Board Self-Assessment</p>	<p>Update Board training manual and conduct yearly review and self-assessment</p> <p>June 2017 - This has not been started. Will begin in Q4.</p> <p>November 2017 - Developed a new board orientation manual. Will roll out to the entire board in January. Abel and I met with each board member personally to ask what they would like to see in 2018, committee assignments, etc. These were completed in Q4.</p>	<p>Review</p>

Goal 6: Develop a work culture that is directly aligned with the Community Foundation's Mission.

Objectives	Indicators of success	Start
<p><i>Create additional opportunities for staff to engage in and with the community they serve</i></p> <p>11.18 Board 2019 Additions Develop a 30th Anniversary Branding Campaign Develop a presence in 6 other counties other than Dona Ana County. Encourage networking within the overall communities.</p>	<p>Provide opportunities for staff to present information to stakeholders on the Community Foundation</p> <p>June 2017 - This has not been completed and will be reviewed with new Director of Development in September.</p> <p>November 2017 - Completed 5 to 6 presentations to the community in Q2, 3 and 4. Completed at least 2 to 3 donor conversations on a weekly basis since July.</p> <p>June 2018 - Continuing personal conversations with donors and potential supporters as well as increasing community presence in Luna, Grant and Otero. Speaking with Optimist and Rotary clubs in June and July.</p>	<p>Continued process</p>
<p><i>Maximize human resources</i></p> <p>11.18 Board 2019 Additions Expand board positions to serve as a liaison between other SNM Counties to assist with outreach from staff.</p>	<p>Develop job descriptions and clearly define roles based on resources to maximize outcomes.</p> <p>June 2017 - This has not been started.</p> <p>November 2017 - Job descriptions for each position have been completed. Working on an employee handbook and procedure manual. Yearly review, goal setting and metrics are being developed to carry the team in 2018. Executive Director will meet with each staff member while also sharing her personal/professional goals with the staff and board.</p> <p>June 2018 - Employee handbook and procedure manual is complete. All yearly reviews completed.</p>	<p>Review Q2 2019</p>
<p><i>Increase personal benefits for staff that encourages work life balance</i></p> <p>11.18 Board 2019 Additions Share staff survey results with BOD to help increase personnel benefits.</p>	<p>Employee feedback surveys</p> <p>June 2017 - This has not been started.</p> <p>November 2017 - In Q3 and Q4 staff was asked to complete a goals feedback form while also developing their goals for next year. A full 2018 calendar has been developed for the team to plan accordingly for the year.</p>	<p>Annual Process</p>

Appendix

SWOT Analysis

After the conclusion of the due diligence, a comprehensive analysis of our Strengths, Weaknesses, Opportunities and Threats (SWOT) was compiled from both an internal and external perspective. This SWOT analysis was useful in determining the critical issues that the Community Foundation needed to address in our strategic plan. The following is an overview of the SWOT.

STRENGTHS

- Overall standing and reputation in community
- Understands local needs
- Community recognition of new leadership efforts
- Staff and Board leadership
- Working environment
- Gala
- Large asset base
- Thoughtful stewardship of funds
- Grant maker
- Endowment management

WEAKNESSES

- History / past reputation (lack of communication)
- Identity / brand awareness
- Clarity of Vision and Mission
- Donor relations, development and recognition
- Nonprofit partner engagement
- Limited staff and resources
- Las Cruces centric

OPPORTUNITIES

- Expand donor base and giving opportunities
- Serve as nonprofit clearinghouse / directory
- Endowment education
- Grow existing endowments
- Promote and contribute to child well-being in New Mexico through grants awarded
- Increase community partnerships
- Engage diverse stakeholders with focus on impactful initiatives

THREATS

- Lack of identifiable focus / impact
- Increasing community needs
- Disengaged next generation
- Economy

OUR COMMITMENT TO SOUTHERN NEW MEXICO

We would like to thank our community members, stakeholders, staff, and the board for their support and assistance during this important process. We are particularly encouraged and heartened by the possibilities before us and by the expression of satisfaction the surveys illustrated. But there is much work to do and it will require a collective effort.

A community foundation represents a wide variety of ideas and interests of donors who are united in a common purpose: to build and strengthen their community. This strategic plan acknowledges this and expresses our continued and shared commitment to improving lives. Yet, we realize that the plan itself will not achieve success unless we share our goals, incorporate them into our daily business practices, and remain diligent as stewards of charitable giving. With the support of outstanding staff, donors, the board of directors, and our community at large, we can build on what others envisioned and created, and set the Foundation on a path of increasing philanthropic excellence for years to come. We invite you to be a part of this journey and welcome your comments and insights.

Your Community Foundation of Southern New Mexico Team,

Terra V. Winter, Executive Director

Alexia Goodwin, Special Events Coordinator

Morgan Pinnell, Executive Administrative Assistant