

**SERVE
CONNECT
SUPPORT
SUSTAIN**



**COMMUNITY
FOUNDATION**
OF SOUTHERN NEW MEXICO

STRATEGIC PLAN

2023- 2028

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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. The Community Foundation continues to invest time and resources to understand how to effectively serve the community going forward. Our Vision statement and Mission drafted in 2016 still rings true for our organization and partners. This plan has been continually updated since 2016 and will continue to serve as our roadmap for Mission achievement. In 2022, the Board of Directors met to review, refine and expand the strategic plan for the coming five years. Additional to new goals, objectives and deliverables an overall scope of work will help define our work moving forward.

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 while continuing to SUSTAIN our future as a Community Foundation for all of southern New Mexico.

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 through diverse, equitable and inclusive community education and outreach;
- Establishing a more intentional and equitable grant and scholarship process, linking funding priorities to focused outcomes;
- Supporting and highlighting nonprofits and their important community role;
- Developing a work culture that is directly aligned with the Community Foundation's Mission;
- Financial focus on building endowment corpus to more effectively support operations and grant making in southern New Mexico while expanding stewardship of all funds managed;
- Focus on community use and sustainability of the Community Foundations permanent home;

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.



SCOPE

During the 2022 Board Strategic Planning session, there was an echo of the importance of the scope of work within the Community Foundation of Southern New Mexico. As a team, the following elements are the foundational pieces of our scope of work. Our scope of work will allow us to have guide polls within our work so that grow effectively and not over stretch our team and resources.

1) Outreach & Engagement in Philanthropy

- a) Focus on growing philanthropy throughout the ten counties served by CFSNM
- b) Connect statewide with other community foundations to accomplish statewide collaborative work including grant making and impact philanthropy.
- c) Growth of endowment principal to \$30 million in 5 years.
- d) Grow programmatic support funds – Will hold 3 annually while assisting in growing new nonprofits.
- e) Review and grow a variety of funds which need to be reviewed and approved by the Board of Directors bimonthly.

2) Grant Making

- a) Focus on current grant cycles in which includes funds managed effectively, funds are awarded annually and reports are collected that show overall impact of dollars invested in our communities.
- b) Grow additional grant making opportunities to impact our communities.
- c) Grow further understanding of Trust Based Philanthropy.

3) Scholarship

- a) Focus on current scholarship cycles which includes funds managed effectively, funds are awarded annually to appropriate students and thank you notes are shared from the student to show impact of dollars given.
- b) Grow additional scholarship opportunities to impact our students.
- c) Scholarships must begin at \$20,000. The team will focus on larger funds allowing for reduced staffing that is taken by smaller scholarship funds.



4) Donor Development

- a) Focus on current endowment donors to fully engage each through stewardship and at minimum quarterly connections.
- b) Focus on new endowment donors to grow endowment corpus.
- c) Focus on staff donor development in which each individual staff member has a donor portfolio of at least 100 individuals each.
- d) Create monthly stewardship pieces for all donors including fundraising events, special monthly outreach and connection points face to face.
- e) Create further connections with current, incoming and emeritus board members and committee members.

5) Legacy Planning

- a) Focus on current Community Legacy Society including at least 2 events annually.
- b) Focus on creating new Community Legacy Society members.
 - i) Adding at least 2 annually.
- c) Focus on Legacy Planning programming including Estate Planning Institute, Southern New Mexico Planned Giving Roundtable, Community Legacy Conference and individual trainings with nonprofit partners.
 - i) Implement review of Locus Impact Investing

6) Nonprofit Capacity Building

- a) Focus on current nonprofit endowment partners that have sustainability funds within CFSNM endowment. This will include growth of endowments.
 - b) Focus on new nonprofit endowment partners with a focus on adding at least 1 annually.
 - c) Create at least 6 community conversations annually.
 - d) Support nonprofit collaboration for education and fundraising including Giving Tuesday, SNM Giving Day, and nonprofit board and volunteer training.
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DEFINITIONS

- 1) **Philanthropy**- The purpose of philanthropy is to improve the wellbeing of humankind by preventing and solving special problems. Philanthropy is not the same as charity. Charity focuses on eliminating causes caused by social problems.
<https://www.learningtogive.org/resources/philanthropy>
- 2) **Southern New Mexico**- Includes ten counties CFSNM services. These are Catron, Chaves, Dona Ana, Hidalgo, Otero, Sierra, Socorro, Grant, Lincoln and Luna.
- 3) **Donor Development**- Donor development is about building relationships with people who give because they believe in the work your non profit is doing. The deeper the relationship, the more they give.
(<https://getfullyfunded.com/the-difference-between-fundraising-and-nonprofit-relationships/>)
 - a) "Development" is, by definition, the process of creating and enhancing relationships with the (potential) donors to ensure current and future funding; "Fundraising" is only about income generation.
(<https://managementhelp.org/blogs/fundraising-for-nonprofits/2016/06/22/fundraising-vs-development-theyre-not-the-same-thing/>)
- 4) **Nonprofit Capacity Building**- Capacity building is an investment in the effectiveness and future sustainability of a nonprofit.
 - a) Capacity building is whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial, or organizational maturity, so it more effectively and efficiently advance its mission into the future. Capacity building is not a one-time effort to improve short-term effectiveness, but a continuous improvement strategy toward the creation of a sustainable and effective organization.
(<https://www.councilofnonprofits.org/tools-resources/what-capacity-building#:~:text=Nonprofit%20capacity%20building%20refers%20to,and%20sustain%20itself%20over%20time>)

METHODOLOGY

Our 2022 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 RPMD Consulting, 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 reviewing feedback for improvement from community stakeholders, board members, donors and staff
- Identification of strategic issues to move the community forward
- Affirmation 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 over a five-year period

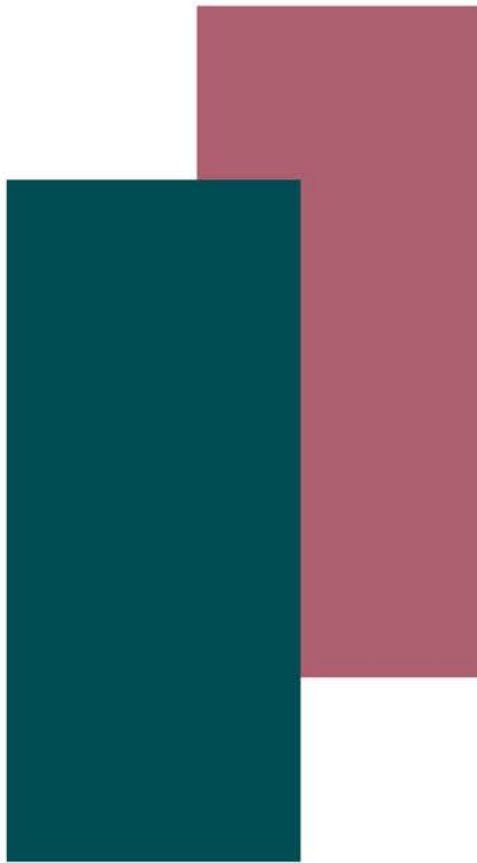
To facilitate achievement of the above, the following processes and activities were undertaken:

- Review of Community Foundation historical strategic planning documents
- Research community foundation best practices
- Review of Community Foundation staff retreat held in October 2021
- SWOT analysis
- Strategic planning session with Board and staff.

These collective activities and the information gathered from each served as the foundation for the 2023-2028 Community Foundation Strategic Plan. The draft plan will be reviewed throughout 2022 for formal vote on the plan no later than September 2022.



2023- 2028 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: Strengthening and expanding its identity and role in southern New Mexico through diverse, equitable and inclusive community education and outreach

Objectives:

- Become the community partner that everyone thinks to connect.
 - Track incoming outreach from nonprofit partners quarterly. This can include fundraising assistance, capacity training, individually mentorship, etc.
- Create an elevator presentation for all board members, volunteer and team.
 - Complete review annually and given to each member in January of each year.
 - Create board outreach and helping with the identity of the foundation.
- Create printed and video vignettes if each of each nonprofit sustainability endowment partner.
 - Complete printed vignettes of each nonprofit for all 46 by end of 2022.
 - Create video vignettes for at least 10 annually beginning 2023.
- Refresh the CFSNM website.
 - RFP 4th quarter of 2022.
 - Begin process in 2023.
- Expand use of all technology and web media.
 - Review social media impact quarterly.
 - Focus on SEO and SEM in 2023.
- Articulate the audience for each partner i.e. donors, nonprofit partner, grantees, scholarship recipients.
 - Create an audience review for each partner





- Invest in CFSNM infrastructure.
 - Annual review of budget.
- Build transparency in all that we do.
 - Share transparency on website
- Build CFSNM as an equitable resource for inclusivity of all.
 - Review website, grant, scholarship and endowment language for inclusivity.
 - Share monthly stories and social media to grow further equity and inclusivity.
- Build a Multicounty advisory council.
 - RFP for members by the 4th quarter of 2022.
 - Begin quarterly meetings in 2023.
- Contact grantees to the Board of Directors.
 - Invite board members to each grant reception.
 - Share final reporting annually.

Goal 2: Establishing a more intentional and equitable grant and scholarship process, linking funding priorities to focused outcomes


- Develop policy and procedure for any emergency fund agreements
 - Focus on contingency processes to set up funds in a quick nature
- Review and continue developing scholarship procedures and policies
 - o Define needs based and achievement based scholarships
 - Focus on growing needs based scholarships
 - o Continue to support donors in their interest in scholarship development
 - o Continue to focus on diversity, equity and inclusion
 - o Review scholarship agreement for best practices in community foundations

- Review and continue developing grants procedures and policies
 - Focus on smaller nonprofits and those that are not always receiving funds.
 - Define needs based grant making per donor agreements
 - Focus on impact grant making that will impact services in southern New Mexico.
 - Connect with community conversations so that grant making is making an impact that is needed.
 - Continue to support donors in their interest in expanded grant making
 - Continue to focus on diversity, equity and inclusion
 - Review grant agreements for best practices in community foundations
- Develop and maintain community needs assessments – become a hub for this knowledge
 - Collaboration with current assessments – MVEDA, DAWI, NPC, etc.
 - Develop annual community conversations that are topic based.
- Develop and review metrics on all funds annually
 - Focus on self-sustainability of funds that effectively impact our communities

Goal 3: Supporting and highlighting nonprofits and their important community role

- Create a larger digital footprint to show impact and collaboration with all our nonprofit partners
 - Social media posts consistently at least 3 times a month
 - Website showing further collaboration
 - Connection with nonprofit partners for cross promotion – including in grant contracts and endowment growth.



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- Continue to grow each nonprofit sustainability fund for further impact to nonprofit partners
 - Focus on endowment growth to \$100,000 for each fund
 - Create fund management buckets for nonprofit support
 - Nonprofit sustainability funds
 - Mentorship, collaborations, Giving Tuesday, and Southern NM Giving Day
 - Add a focus on 46 nonprofit endowment fund holders
 - Grantees
 - Site visits, touchpoint before grant final, reporting touchpoint, grantee parade, digital campaigns.
 - Incubator programs
 - Mentorship, storytelling, business development and showcase of collaborative work.
 - Nonprofit capacity build
 - Partnership with NMSU Graduate School and On Demand Coursework
 - Southern New Mexico Planned Giving Roundtable
 - How to grow your endowment at least twice a year
 - Event partnership
 - Six community conversations annually
 - Nonprofit event space management
 - Recognition of partners within the CFSNM building

Goal 4: Developing a work culture that is directly aligned with the Community Foundation's Mission

- Review and continue to develop policies and procedures that are best practice for community foundations

- o Develop a contingency planning for organization for any given emergency
- Develop staff retention plans to reduce turnover
 - o Review benefits in regards to PTO, retirement planning, etc.
 - o Develop a work life balance plan
- Develop storytelling relationships with donor, volunteers, and community.
- Continue to develop string internship opportunities for students at NMSU and DACC
- Develop a consulting fee for board training, executive director membership, etc. for support of President and CEO's work in community.
- Review committees and restructure in 2022
- Succession planning for president and CEO

Goal 5: Financial focus on building endowment corpus to more effectively support operations and grant making in southern New Mexico while expanding stewardship of all funds managed

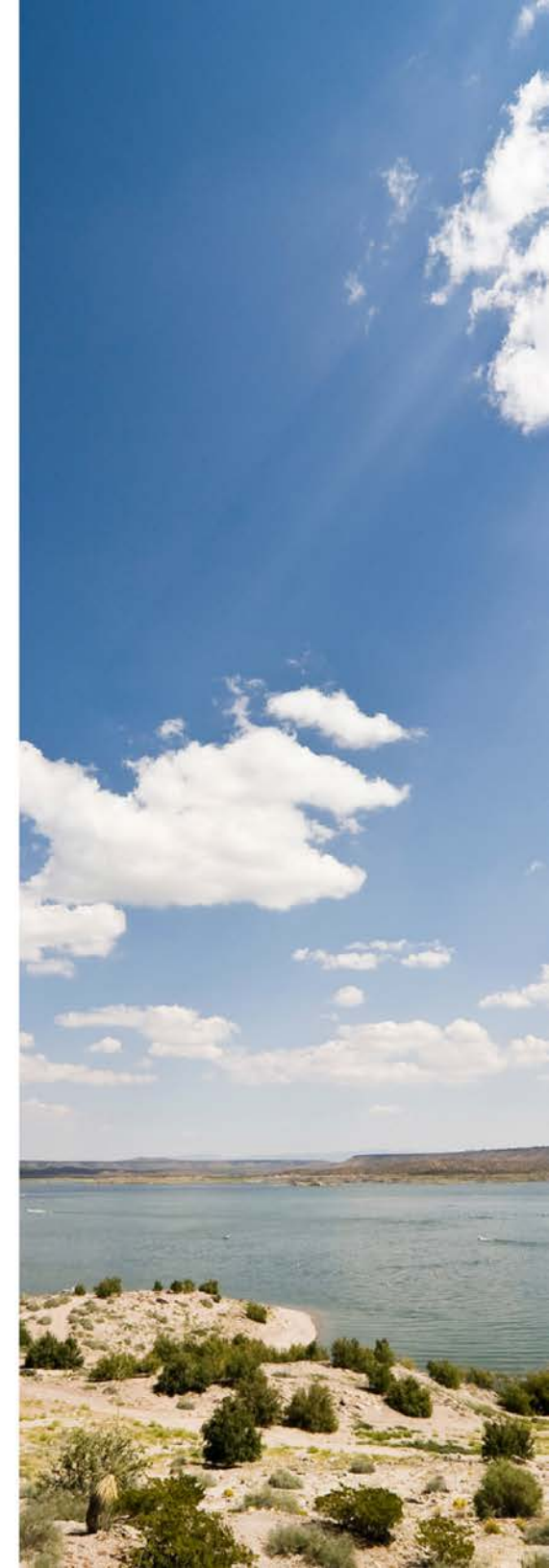
- o Align efforts with Community Foundation scope.
 - o Develop a scope that incorporates the following:
 - Outreach & Engagement in Philanthropy
 - Grant Making
 - Scholarship
 - Donor Development
 - Legacy Planning
 - Nonprofit Capacity Building



- o Develop a core values statement associated with the mission, vision and scope
- o Increase connection with employers to increase employee giving in coordination with corporate partnership
- o RFP for Investment Partners in 2023
- o New donor acquisition
 - Review new donor acquisition annually.
 - Ask Board of Directors to assist in creating new donors to our program.
 - Focus on LyBunt (donors that gave last year but not this year) and SyBunt (donors that gave in some years but not this year) donors annually.
- o Building endowment - % growth over the next 5, 10 and 15 years
- o Additional focuses on poverty, elderly, veterans
- o Additional policy and procedures on emergency funding including VOAD
 - Emergency planning – how to we support pop up funds to help our communities

Goal 6: Focus on community use and sustainability of the Community Foundations permanent home.

- Develop a rental contract and plan for common area use of the CFSNM permanent home.
- Develop a large maintenance endowment fund to focus on maintenance and operations of the building.
- Become the gathering place for all community nonprofits
 - o Community calendar



Appendix

SWOT Analysis

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
- Viewed as an ivory tower
- Size of staffing for areas served

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, President and CEO

Savannah Zamora, Finance, Grants and Scholarships Coordinator

Valeria Arriaga, Administration and Operations Coordinator

