

A large, stylized sun logo in a light orange color, composed of concentric, jagged lines, is positioned in the background of the top orange section.

New Mexico Foundation Strategic Plan 2025-2027





Mission, Vision, and Values

Board approved 11.20.2024

Mission

To steward community resources, build partnerships, and create opportunities that transform lives throughout New Mexico.

Vision

We envision a state where every New Mexico community has access to resources that enhance their ability to enjoy a better quality of life. Through new and established partnerships with leaders in the communities we serve, we support effective strategies to address statewide issues together.

Values

These values exist to help guide us to reach our mission and vision.

INTEGRITY

We steward and distribute resources with honesty and accountability.

COLLABORATION

We engage in partnerships based on building long-term trust.

EQUITY

We make decisions with recognition of and respect for the distinct history, traditions, language and culture of the communities we serve.

SUSTAINABILITY

We invest in community self-determination and wellbeing that endures for future generations.

Goal 1

Increase NMF’s operating revenue to make the Foundation self-sustaining to meet its mission.

OBJECTIVES:

- Grow both donor advised and endowment funds to cover NMF’s operating budget by 10% beyond current levels, another 10% in 2026, and an additional 10% in 2027.
- Implement a comprehensive fund development strategy, with clearly stated benchmarks and responsibilities for board and staff members.
- Launch a campaign to generate donor advised funds as a long-term strategy for NMF to increase operating revenue and expand grant making.
- Continue offering endowment accounts.
- Develop and launch a planned giving program.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Create and share a comprehensive fund development strategy after the President/CEO and Development Director are hired	CEO with Directors					
2) Update Erika’s job description to delineate new duties as Grants Director	Grants Director					
3) Recruit, hire, and train the Finance Grants Manager	Finance Director					
4) Provide updates to the Executive Committee of the Board on efforts to increase giving	Directors President & CEO					
5) Engage board members in making asks for additional donor advised funds and planned giving gift	President & CEO					
6) Transition operations responsibilities to Finance Department by Jan 1, 2025	Finance Director					
7) Establish an endowment in December 2024, and begin trainings and granting of funds	Executive Team					
8) Review all endowment and donor advised agreements, standardize and update	Executive Team with outside legal review					
9) Develop and launch a planned giving program. Then continue building on initial success	Development Director					
10) Create a Development Plan for 2025 by 12.31.2024	Programs Director					

Indicates timeframe of implementing Actions.

Goal 2

Support community partners statewide in realizing their desired outcomes.

OBJECTIVES:

- Provide capacity to sustain the Native American Recovery Fund and incubate leadership for a mid-2025 transition to independent status.
- Maintain and grow relationships with existing and new partners.
- Gather information on each county and Native population (tribes, nations and pueblos) in the state, including identified needs and history of support from NMF.
- Continue our support of emerging organizations through fiscal sponsorships.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Develop a detailed transition plan for the Native American Recovery Fund by 11.5.2024	Grants Director and Programs Director					
2) Track the level of action or inaction of each fiscally sponsored program	Community Outreach Coordinator					
3) Tap into Anchorum Foundation’s commitment to support Native communities in New Mexico	Fellow, Programs Director					
4) NARFZG Leadership Team develops capacity and vision to be able to take on this project as an independent initiative	NARFZG Leadership Team, with support from Grants Director and Programs Director					
5) Geographically map out where all NMF work is currently taking place, including fiscally sponsored projects	Grants Team					
6) Identify needs in the state that NMF would be most inclined to target	President & CEO					
7) Create an internal roles and responsibilities document for fiscal sponsorships	Executive Team					

Indicates timeframe of implementing Actions.

Goal 3

Increase the level of grant-making and impact.

OBJECTIVES:

- Collaborate with national foundations to bolster the impact of NMF in rural and Native communities statewide.
- Launch a major giving program. Solicit and steward major donors in support of grant making.
- Develop a grant making strategy and giving initiatives dedicated to one or more of the state’s most pressing needs.
- Develop an element of grant reporting to measure specific grantee impacts.
- Bolster NMF’s tracking capabilities of incoming and outgoing grants.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Develop clear and known protocol for reviewing and accepting new grants. <ul style="list-style-type: none"> • Checklist: <ul style="list-style-type: none"> ○ Do we have adequate staffing for this? ○ Can our systems handle this? ○ Does it conflict with any of our values? ○ Is it aligned with our priorities and strategic plan? ○ Will we have time to raise funds that are more sustainable? ○ Who is the champion that brings this to the table? 	Executive Team					
2) Shift Executive Team job titles/responsibilities to a four person Director structure by 1.1.2025	Executive Team					
3) Establish thorough systems to track all elements of passthrough grants, including staff time and deliverables. Utilize Salesforce to enact this tracking	Nancy in new title as Programs Director and Finance Grants Manager					
4) Implement all elements of the Bezos Earth Fund with maximum impact	Programs Director					
5) Implement all elements of the Hilton Foundation grant with maximum impact	Grants Team					
6) Implement all elements of the Anchorum grant with maximum impact	Programs Director					
7) Implement all elements of the USDN/Bezos grant with maximum impact	Programs Director					
8) Create and report on progress of a major giving plan.	Development Director					

Indicates timeframe of implementing Actions.

Goal 4

Promote the work of NMF across the state, especially in areas with the greatest needs.

OBJECTIVES:

- Familiarize the broader public, the social sector, current and potential donors about NMF and its work.
- Communicate with funders to tell our story and the story of grantees.
- Increase public awareness of the impact of NMF’s grantees in working to bring about desired local change.
- Engage in program, grant, and convening activities with other community foundations in New Mexico.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Develop and implement a communications plan to promote the work of NMF	Development and Communications Manager					
2) Do outreach to nonprofit organizations across New Mexico who have broad constituencies and can help to spread word of the Foundation’s work	All NMF					
3) Capture and organize stories of success among NMF’s grantees and fiscally sponsored projects	Development and Communications Manager with support from all NMF					
4) Update the Foundation’s website to better promote NMF’s work, statewide role, and impacts	Development and Communications Manager					
5) Build capacity for website to host pages for fiscally sponsored projects, including avenue for donations	Development and Communications Manager with support from Community Outreach Manager					
6) Utilize LinkedIn and Instagram as a vehicle for spreading NMF’s success stories	Administrative Coordinator					

Indicates timeframe of implementing Actions.

Goal 5

Build and maintain internal systems and capacity for tracking grants, finance, and giving.

OBJECTIVES:

- Maintain integrated information systems, specifically dedicated to the needs of Finance, Grants, and Development.
- Strengthen financial tracking and adjust annual budget periodically.
- Establish Operations as a set of responsibilities managed by Finance which will enable Development to focus on donor relations and raising funds.
- Closely review and monitor all partner agreements, including grant and fiscal sponsorship agreements.
- Maintain and update internal protocols for major elements of NMF operations.
- Share financial statements and budget updates with staff on a regular basis.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Build out the NMF Salesforce system for incoming grants	Program Director					
2) Establish consistent integration and communication between all four information systems (Virtuous, Sage, Salesforce & Foundation Cloud)	Executive Team					
3) Take an inventory of current staff protocols at the Foundation	Executive Team					
4) Identify gaps and protocols that need to be updated, including: <ul style="list-style-type: none"> o Grant agreements – track all incoming grants to NMF and our fiscal sponsor organizations. Included will be grant applications, agreements, budgets, timelines, reporting, and communication with funders. Use Salesforce for this process. 	Program Director with support of Executive Team					
5) Train all staff in updated protocols and systems, and know how things flow	Executive Team					
6) Provide updates to board members on development of internal protocols	President & CEO and Executive Team					

Indicates timeframe of implementing Actions.

Goal 6

Foster a diverse and knowledgeable board, a professional and dedicated staff, as well as an organizational culture of intention and impact.

OBJECTIVES:

- Establish, integrate, and uphold a set of core values for NMF.
- Conduct a search and hire a new CEO to provide critical leadership to staff, board, donors and New Mexico’s philanthropic community.
- Grow the staff team to enhance capacity in the areas of major gifts, grants management, operations, and fiscal sponsorships.
- Develop an ongoing pool of future board and committee members to bring a continuing range of skills and other diversity to board and committee work.
- Provide onboarding for new Board members and board trainings for all members.
- Strengthen NMF’s organizational culture by maintaining clear communications, providing professional development opportunities and engaging all staff in leadership and decision-making where appropriate.

Action	Responsible	JAN-JUNE 2025	JULY-DEC 2025	JAN-JUNE 2026	JULY-DEC 2026	JAN-DEC 2027
1) Recruit additional board members who are active in Board meetings and decisions, bringing the total size of the board to nine.	Executive Committee and President & CEO					
2) With Kittleman as NMF’s search firm, the Board will hire a President & CEO.	Board search committee					
3) Update job descriptions for board officers and board members at large	President & CEO					
4) Recruit and hire a Development Director after the President & CEO is in place.	President & CEO with Executive Team					
5) Recruit and hire a Grants Manager to report to Grants Director.	Grants Director with support of Executive Team					
6) Provide training and information for the board on the stories of the work that is taking place	President & CEO					
7) Schedule regular meetings with individual or small groups of board members	President & CEO					
8) Conduct semi-annual reviews with staff to determine strengths and gaps in instituting and integrating four agency values	Executive Committee of Board					
9) Provide board and staff training on trust-based philanthropy	President & CEO					
10) Explore how we can operationalize trust-based philanthropy more within our own structures and systems	President & CEO					
11) Provide board training on board roles and responsibilities	President & CEO with Executive Team to hire consultant					

Indicates timeframe of implementing Actions.



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