

# Serve Connect Support



STRATEGIC PLAN  
2017-2019

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# Letter from Board President and Executive Director

Dear Colleagues and Friends:

The Community Foundation of Southern New Mexico (“Community Foundation”) is excited and challenged by a growing recognition of the power of philanthropy to bring meaningful change to southern New Mexico. With new structure and leadership, we remain committed to stewarding the philanthropic investments of our donors and nonprofit partners. We aim to Serve, Connect and Support the present and future needs of our region.

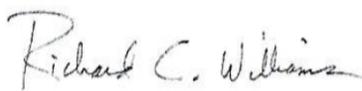
The need to plan for the future is crucial. We must understand the communities in which we are privileged to serve and strive to deliver the most powerful impact possible. Strategic planning enables us to confirm our business model is reflective of our current operating environment, including changing demographics, giving trends, and community needs. It must also be sustainable, so that our efforts today continue to bear fruit for generations to come. Equally important, planning enables us to realize our unique capability to affect change in southern New Mexico.

The plan looks both inward at our own needs and aspirations to deliver the best product, and outward at opportunities for significant impact and growth. We understand that we are all partners in forging positive change, and must be aware of the opportunities, needs and challenges that exist. To inform the development of this plan, we engaged a cross-section of more than 100 donors and community stakeholders to provide input on our past, present and future.

An effective strategic plan must be focused, realistic and achievable. Priorities are identified to address the Community Foundation’s needs and guide its activities. Much of the work we have done in the past will continue, but we believe the priorities and improvements identified here will make the difference in strengthening the Community Foundation and ultimately our community.

We hope you enjoy and find inspiration reading about our plans. Please be in touch with us to learn more about our strategic plan, discuss your philanthropic goals or share your ideas about our community.

Sincerely,



Richard Williams, Board President



Sincerely,



Jen Cervantes, Executive Director



## ACKNOWLEDGEMENTS

The Community Foundation would like to acknowledge the support of our dedicated Board of Directors and team in the development of this strategic plan. In addition, a special thanks goes to the donors, community partners and leaders who provided valuable input to the process through surveys. Finally, we thank all who have lent support and guidance over the last several months as we have embarked on a new journey.

### Community Foundation Board of Directors

Richard Williams, President  
Mellow Honek, Vice President  
Beth Fant, Treasurer  
Ammu Devasthali, Secretary  
Jeremy Settles, Past President  
Ken Binkley, Member-at-Large  
George Vescovo, Member-at-Large  
Rachel Corona  
Abel Covarrubias  
Sabrina Martin  
Rod Reyes  
Diana Seward

### Community Foundation Team

Jen Cervantes, Executive Director  
Courtney Lopez, Assistant Director for Development and Communication  
Angel Solis, Executive Coordinator  
Alexia Goodwin, Special Events Coordinator

## 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, with our new leadership, team and Board of Directors, invested time and resources to understand how to effectively serve the community going forward. This process involved a retrospective analysis of our operations and impact, a study of best practices and a planning process that incorporated valuable input from donors, partners and community stakeholders. The result is the creation of a Vision statement, a refined Mission and a 2017-2019 Strategic Plan that will 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.

In the upcoming months and years, the Community Foundation will 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

During the planning process, our Board and leadership team met to review and refine our Mission statement and to develop a Vision statement that are both relevant and responsive to community needs. Updates to the Mission were developed collectively through active participation from the Board and Community Foundation team. 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

With new leadership and our long history serving southern New Mexico, the Community Foundation Board of Directors and team embarked upon a journey to evaluate, strategize and plan for the future of the Community Foundation. 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.

# 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.

Four key questions were asked in all four survey groups:

1) *How well does the Community Foundation communicate its role?*

*“New management is doing an outstanding job reconnecting with donors and increasing transparency.” - Donor*

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.

*“We have to do a better job of publicizing the many grants and scholarships we provide each year.” - Board Member*

2) *Do you think the Community Foundation is headed in the right direction?*

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.

*“Within the last year of restructuring at CFSNM, I have noted positive change in the path they are on. This can be attributed to the new leadership and transparency the organization now has.”*  
- Community Member

3) *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.

4) *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.

*“Great organization with much needed mission. There are pockets of the community which are underserved and there are donors who have an affinity to assist.”*  
- Community Member

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.

*Staff is “positive, committed, and dedicated to what they do.”*  
- Community Member

## 2017-2019 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.*

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Nonprofits, donors, community partners and community as a whole are more aware of the Community Foundation’s Vision, Mission and impact</i>	Create an annual report	Q4, 2016
<i>Increased Board visibility and community awareness of Community Foundation work (scholarships, grants awarded, etc.) in southern New Mexico</i>	Publish board profiles and success stories in newspaper, as well as post on social media	Q1, 2017
<i>Share impact of the Community Foundation</i>	Create an inventory of success stories to utilize in annual report Copies of newspaper articles are on the website and success stories appear on both social media and on the website Implement social media into Communications Plan	Q1, 2017
<i>Ensure all Board members are knowledgeable and understand the Community Foundation’s Mission and can subsequently serve as ambassadors for the organization</i>	Develop a “Board” education campaign (i.e. 30 second speech, handout)	2017
<i>Support volunteer opportunities</i>	Increase number of volunteers	2017
<i>Increase nonprofits’ understanding of the role of the Community Foundation and other funders Provide training and technical assistance to nonprofits as it relates to funders and funder priorities Increase understanding of nonprofit community in southern New Mexico</i>	Co-host an annual community Summit in conjunction with community partners	2018

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

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Conduct “special” projects review</i>	Amend special project agreements, fee structure and formalize expectations	Q4, 2016
<i>Increase stewardship of donors and stakeholders</i>	Develop a Stewardship Plan, encompassing all current funds, with clear, concise guidelines for implementation	Q1, 2017
<i>Introduce and engage key community leaders in the Community Foundation’s work</i>	Host quarterly Community Leader luncheons	Q2, 2017
<i>Develop strategies for fund management with current resources</i>	Create a Long-Term Fund Development Plan	Q3, 2017
<i>Create distributable income process</i>	Ensure 100% of distributable income is disbursed according to donor wishes	2017
<i>Ensure donors are informed and aware of fund disbursements</i>	Share fund impact	2017
<i>Share meaningful and appropriate outcomes with donors</i>	Number of communications shared	2017
<i>Develop and operate efficient and effective scholarship program</i>	Award 100% of all internal and external scholarships and implement new online software for scholarship and grant application submissions	2017
<i>Conduct “cultivation” events hosted by Board members</i>	Number of events	2018
<i>Conduct a Thank-a-thon</i>	Contact all Community Foundation endowment sponsors and individual donors who have given over the last two years to thank them for their support	2018
<i>Establish a growth threshold for maintaining current funds or develop options for entities that do not want to grow fund</i>	Meet with all endowment sponsors to learn of fund intent, and, based on feedback, present growth plan options or choices in closing out fund or rolling to another endowment	2018

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

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Focus grant-making on a specific social indicator with measurable outcomes</i>	Adopt policies that dedicate certain funds to a single topic/issue each year(s) for greater community impact	Q4, 2016
<i>Restructure Community Foundation grant-making cycle</i>	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	2016 & 2017
<i>Conduct Community Foundation grant training for area nonprofits</i>	Develop workshops that detail Community Foundation expectations of potential grantees	2017

*GOAL 4: Support and highlight nonprofits and their community role.*

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Nonprofit partners will share success stories with the Community Foundation for increased publicity</i>	Feature local nonprofit success in a variety of mediums (written and social media)	2017
<i>Create a login for “Library time” at the Community Foundation for nonprofits</i>	Acquire software and develop user processes	2017
<i>Engage and increase awareness of nonprofit partners outside of the Las Cruces area</i>	Outreach to six other counties serviced by the Community Foundation to develop key partnerships	2018
<i>Better informed community members regarding pressing issues and opportunities to assist and opportunities for corporate and donor engagement</i>	Host an event that highlights nonprofit work/success	2019

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

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Maximize use of Board member time and talent</i>	Review all policies, beginning with governance policy, to align with goals and Mission	Q1, 2017
<i>Provide clarity of roles and responsibilities of Board members</i>	Update Board training manual and conduct yearly review and self-assessment	Q2, 2017
<i>Activate committees and work</i>	Institute a Board software program to keep track of minutes, notes and committees and meet with committees regularly	2018

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

<b>Objectives</b>	<b>Indicators of success</b>	<b>Start</b>
<i>Create additional opportunities for staff to engage in and with the community they serve</i>	Provide opportunities for staff to present information to stakeholders on the Community Foundation	Q1, 2017
<i>Maximize human resources</i>	Develop job descriptions and clearly define roles based on resources to maximize outcomes	Q3, 2017
<i>Increase personal benefits for staff that encourages work life balance</i>	Employee feedback surveys	2017
<i>Engage employees in the philanthropic process</i>	Create donor advised funds for staff	2018

# 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

Allow me to begin by thanking community members, stakeholders, staff, and the board for their support and assistance during this important process. I am 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.

**Jen Cervantes**  
Executive Director