This report presents results from the June 14, 2016 planning summit
Roadrunner Food Bank, Albuquerque, New Mexico

CONVENER
CEO Nonprofit Roundtable

FACILITATOR
New Mexico First
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EXECUTIVE SUMMARY

Creating abundance for all New Mexicans – to meet needs and improve quality of life – is a key motivating factor for people advancing a strong nonprofit sector. This shared desire was made clear at a statewide summit of nonprofit professionals, funders and corporate sector leaders held June 2016 in Albuquerque.

The majority, if not all, of the 75 participants saw nonprofits as an important part of an overall strategy to raise the standard of living for all New Mexicans. Nonprofits were rightly recognized as having the ability to improve the economic self-sufficiency and well-being of the people of New Mexico, thus generating interest to promote and expand nonprofit organizations’ role in ‘moving the needle’ for the state.

Creating centralized locations for information and support, elevating nonprofits’ impact, and assisting communities in advocating for their needs were major points of discussion throughout the day. The necessity to increase efficiency both within the nonprofit sector as well as between nonprofits and for-profits, was recognized. Participants also focused on how to use and expand existing resources. These discussions led to the creation and refinement of recommendations to better position nonprofits to actively work together and across sectors and foster dramatic change in the political and economic landscape of New Mexico.

Specific themes that emerged include:

- Reforms within the nonprofit sector:
  - Creating a formalized nonprofit hub to align efforts, as well as share information and resources
  - Diversifying funding strategies
  - Identifying and promoting best practices
  - Advocating for nonprofits, including the needs they address within the community

- Cross-sector
  - Increasing cross-sector efficiency communication and collaboration
  - Building network and mentorship opportunities

A complete list of the summit’s recommendations, organized by theme and then by the small group, is presented in this report. Organizations interested in helping to advance any of the proposed reforms should contact New Mexico First.
INTRODUCTION

Nonprofits contribute significantly to New Mexico’s economy, providing jobs and needed services. To strengthen and enhance this sector – including opportunities to collaborate with other sectors – the Nonprofit Sector Strategic Planning Summit brought together service providers, funders and corporate leaders from throughout the state. Convened by the CEO Roundtable and facilitated by New Mexico First, the summit produced a platform of proposed reforms and activities. Organizations, coalitions and companies will have the opportunity to advance these recommendations in the coming years, with particular emphasis on the next six months.

Convener

The CEO Roundtable, an informal coalition of nonprofit executives, spearheaded the event. The group is dedicated to advancing professionalism and effectiveness within the nonprofit sector. Members include:

- Roadrunner Food Bank
- Heading Home
- Girl Scouts of New Mexico
- New Mexico First
- Ronald McDonald House
- WESST

Facilitator

New Mexico First engages people in important issues facing their state or community. The public policy organization offers unique town halls and forums that bring together people from all walks of life to develop their best ideas for policymakers and the public. New Mexico First also produces nonpartisan public policy reports on critical issues facing the state. These reports – primarily on water, education, healthcare, the economy, and energy – are available at nmfirst.org.

The organization was co-founded in 1987 by retired U.S. Senators Pete Domenici and Jeff Bingaman. New Mexico’s current U.S. Senators Tom Udall and Martin Heinrich now serve as honorary co-chairs.

Summit Process

The one-day event asked participants to share their best ideas for enhancing the nonprofit sector. The 75 registrants were divided into four small groups, each designated with a color (blue, green, brown and orange) and managed by a two-person facilitation team. Their discussion was informed by a background report on issues facing the nonprofit sector. Each small group developed up to two recommendations (each comprised of an action and strategies), and the full group used electronic polling devices to gauge level of support and predicted level of impact.
As expected, there was considerable commonality between the groups. To make it easier for readers to consider the ideas by topic, this report first presents all the summit’s proposals thematically. For example, in this section, similar ideas developed by the green and the blue groups might be presented together if they share common elements. Then, in the appendix, the report presents the recommendations as authored during the meeting, organized by group, and listed in order of support.

**Next Steps**

Change is challenging and requires many advocates. This final report will be sent to all registrants as well as known stakeholders in the nonprofit, business and policymaking communities. An implementation team, led by the CEO Roundtable, will select and advance key recommendations. The CEO Roundtable will circulate a preliminary implementation framework by early Fall 2016. Meanwhile, other advocates associated with the nonprofit community are also invited to circulate and advance this report’s proposed reforms. People interested in helping achieve any of the recommendations are asked to inform New Mexico First, thus preventing duplication of efforts and enabling tracking of outcomes.
RECOMMENDATIONS BY THEME

A combined total of eight recommendations, including 33 specific strategies, were developed during the one-day meeting. This section presents the ideas thematically.

Potential Reforms Within the Nonprofit Sector

CREATE A FORMALIZED HUB TO ALIGN EFFORTS, INFORMATION AND RESOURCES

Participants discussed ways to implement an inclusive, integrated system to work across communities, one that would help streamline the sector by maximizing the efforts of efficient and effective organizations. While the idea of a statewide agency acting as an umbrella for all nonprofits was discussed, there was also thoughtful dialogue about ways to link nonprofits and share information or resources in ways that would not require the establishment of a new, stand-alone organization.

Create centralized ways to collect and share information.

- Provide a common language and develop a strategic communications plan for policymakers and consumers – one that identifies and integrates missing resources necessary to support the communications plan.
- Agree on a communication tool that is the go-to location for information.
- Research existing successful models for strengthening the nonprofit sector.
- Create a centralized nonprofit resources infrastructure in urban and rural areas (could be an organization) that is:
  - Valuable, thus ensuring nonprofit and funder buy-in
  - Includes resources such as training, communication and development
- Deploy existing resources, such as SHARE New Mexico, the Anne E. Casey Kids Count Report, UNM’s Institute for Policy, Evaluation & Applied Research, and the Pew Data Center to maintain a centralized information repository on the important outcomes nonprofits are achieving in their communities.

Share resources within the sector.

- Align funders and donors, promoting successful groups and projects, and facilitating mergers and acquisitions.
- Utilize clearinghouse and central resources for information, peer support, existing programs and support (asset mapping).
- Identify and leverage existing resource programs, such as the Center for Nonprofit Excellence, Association of Fundraising Professionals, Santa Fe Community Foundation’s Philanthropy HUB and the Young Nonprofit Professionals Network.
- Create a hub where donated, essential physical items needed by nonprofits and/or the people they serve are inventoried and distributed (or sold).
- Share and consolidate back office services and resources.
• Create mechanisms to make volunteering easier by using existing resources (e.g. SHARE New Mexico), and engaging underserved groups such as young people and retirees.
• Connect existing programs to needs.
• Identify common reporting tools, peer support mechanisms, and joint training.
• Foster leadership through mentorship programs and board development training.
• Cultivate a second version of the website, SHARE New Mexico, to provide tools to increase the effectiveness of nonprofits.

DIVERSIFY FUNDING STRATEGIES
Participants recognized the profound need for adequate, stable and varied sources of funding, enabling nonprofits to perform the essential services many New Mexicans need. To this end, discussion focused both on how to increase the amount of funding for nonprofits while also looking at ways all funds can achieve the highest impact.

Increase the size of the pie.
• Endorse and educate nonprofits on strategies to diversify the funding of the nonprofit sector to improve the quality of life in NM, which could include:
  o Social enterprise
  o Policy changes (e.g. less reliance on traditional state revenues)
  o Social impact bonds
  o Better applications and new concepts to secure more funding
• Support and advocate for New Mexico nonprofits on a national level to connect their work with external funding mechanisms.

Maximize the impact of funding.
• Align strategies and create a better value proposition for funders
• Leverage resources, internal and external, to create and sustain positive change in the nonprofit sector and position non-profits to be key players in solving New Mexico’s challenges.
• Build grant-writing capacity (i.e., Grants Collective, Nonprofit Resource Group).
• Maximize financial resources by creating a resource hub that all nonprofits can access. It should provide back office support including bookkeeping, information technology, financial advice, marketing, communications, human resources and grants management.
• Develop, promote and explain funding strategies that are new, broad-based, collaborative and sustainable (i.e., Heading Home case study).

IDENTIFY AND PROMOTE BEST PRACTICES
Creating formal systems to ensure commonality among tracking and reporting of best practices surfaced in most deliberations. To do this, participants focused both on using current resources and expanding them to create greater consistency.

• Identify specific, measurable goals and track and share the results as well as coordinate efforts as appropriate.
• Train nonprofits on how and what to measure (results-based accountability or logic models).
• Share progress and successes internally and externally and correct course when needed.
• Engage SHARE New Mexico to measure progress and share data.
• Measure outcomes consistently and promote successes statewide.
• Utilize clearinghouse and central resources to identify/create common reporting tools and best practices (with key learnings posted on SHARE New Mexico).

ADVOCATE FOR NONPROFITS, INCLUDING THE NEEDS THEY ADDRESS
Summit participants pointed out that people outside the nonprofit sector need to understand the breadth and depth of these organizations’ contribution to New Mexico. Participants also talked about amplifying community voices to create better bridges between what communities need, existing services nonprofits offer, and any new services that need to be developed.

• Generate community and political will (including a nonprofit liaison to communicate with communities, as well as a strategic marketing plan emphasizing the human and economic impact of the nonprofit sector).
• Create centralized ways to build and support political advocacy and public relations.
• Develop a communication infrastructure that allows for inclusiveness and voices from communities throughout New Mexico.

Potential Reforms Between Multiple Sectors

IMPROVE COMMUNICATION AND COLLABORATION BETWEEN SECTORS
Just as a formalized hub was suggested for the nonprofit sector as a whole, participants sought ways to streamline the sharing of information and resources across sectors. The goal was to build further collaboration among sectors, while also better positioning nonprofits to help strengthen and expand the safety net already provided by these service organizations.

• Form a working group to strengthen relationships between sectors, making them more efficient (including data, technology, contracting and leveraging funds).
• Create and fund a nonprofit, private, government working group to direct an aggressive, coordinated, cross-sector effort behind transformative projects, to include: forming common political ground to focus on key priorities and building in an ecosystem/infrastructure.
• Create an awareness campaign to educate donors on effective giving.
• Create a clearinghouse for data sharing on a state, county and regional basis; focus on critical service needs, demographic indicators, national rankings, and trends.
• Create a process for funders, grantees, service recipients and their communities to work on issues and develop strategies together.
• Cultivate SHARE New Mexico 2.0 as a communication tool for improving communication and coordination among nonprofits, funders, foundations, corporations, government entities, and individuals – as well as to act as a resource for decision-makers and the media. To effectively do this, the group recommended:
Requesting status of development of the new version
- Providing ongoing input as the tool is developed (e.g. by taking a survey)
- Use the existing website, SHARE New Mexico, to share information about opportunities to network more broadly face-to-face.

**BUILD NETWORK AND MENTORSHIP OPPORTUNITIES**

In addition to streamlining communication, participants at the summit focused on ways to strengthen opportunities for those across sectors to better learn from each other and share resources. This included analysis to determine what programs, policies and funding would be most impactful in the future.

- Foster informal, organic networks between leaders of nonprofits, funders, foundations, government agencies and interested corporate partners.
- Support network nodes as they emerge.
- Assess programs, policies and funding in multiple states to learn what is, and is not, working.
- Recruit board members and develop partnerships with educational institutions, businesses and government to implement entrepreneurial strategies. For example, one of the groups worked on a way to use such networks to improve education:

**ACTION: Invest in education as a priority, engaging every sector to propel all New Mexicans from birth, to self-sufficiency and productive community membership.**

- Create a neutral forum of all stakeholders in education to create democratic, shared priorities and strategies, and define common outcomes and indicators (e.g. focusing on grade-level reading).
- Attack poverty as a root cause of low educational performance, aligning action among nonprofit, for-profit, and governmental institutions.
- Collaborate with nonprofits to develop a school-based system of family support centers focused on student success.
- Make New Mexico the first state to offer quality early childhood education to every child.
- Identify what is currently working in New Mexico to accomplish this goal.

**Conclusion**

The CEO Roundtable and New Mexico First thank those who supported the summit, including the sponsors, participants and facilitators. Taking the time to connect and strategize about ways to improve life in New Mexico by strengthening our nonprofit sector is a worthwhile effort, but finding the time to do so can be challenging. To best honor and utilize the time spent on the summit, all participants are urged to identify ways to advance this report’s recommendations. More importantly, participants are asked to seek ways to support one another’s work and take pride in the reality that the nonprofit sector – with its many partners – works every day to make New Mexico stronger.
## APPENDIX A

### RECOMMENDATIONS BY GROUP

Overall feedback from the entire group was gauged in two ways:

1) Level of support for the entire recommendation (strongly support, moderately support, or do not support)

2) Predicted level of impact for each specific strategy, if it were implemented (high impact, moderate impact, little impact)

<table>
<thead>
<tr>
<th>REC #</th>
<th>GROUP NAME</th>
<th>RECOMMENDATION</th>
<th>PERCENT WHO STRONGLY SUPPORT</th>
<th>PERCENT PREDICTING HIGH IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Brown</td>
<td>ACTION #1: Actively work together in the nonprofit community to foster dynamic change in the political and economic landscapes of New Mexico.</td>
<td>75%</td>
<td>63%</td>
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<td>STRATEGIES:</td>
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<td></td>
<td></td>
<td>A. Educate nonprofits on strategies to diversify funding for the sector. Endorse these strategies sector-wide to promote alignment around them, thus creating better value proposition for funders, including:</td>
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<td></td>
<td></td>
<td>• Social enterprise</td>
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<td></td>
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<td>• Policy changes, i.e., less reliance on traditional state revenues</td>
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<td></td>
<td></td>
<td>• Social impact bonds</td>
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<td>• Better applications of and new concepts to secure more funding</td>
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<td>B. Develop a strategic communications plan for policy makers and consumers that:</td>
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<td>• Uses and improves existing resources (e.g. SHARE New Mexico, Anne E. Casey Kids Count Report, UNM IPEAR and the Pew Data Center), while supporting and maintaining a centralized information repository on the important outcomes nonprofits are achieving in their communities</td>
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<td>• Identifies and integrates missing resources necessary to support the communications plan</td>
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<td></td>
<td></td>
<td>• Measures outcomes consistently and promote successes statewide</td>
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<td></td>
<td></td>
<td>• Trains nonprofits on how and what to measure (e.g. results-based accountability and/or logic models)</td>
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<td></td>
<td>C. Create and fund a nonprofit, private, government working group to direct an aggressive, coordinated, cross-sector effort behind transformative projects. Suggestions on how to begin doing this include:</td>
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<td></td>
<td></td>
<td>• Finding common political ground to focus on key priorities, and</td>
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<td></td>
<td></td>
<td>• Building an ecosystem/infrastructure.</td>
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<tr>
<td>2</td>
<td>Orange</td>
<td>ACTION #1: Strengthen the tracking and sharing of information and best practices among nonprofits and other sectors to improve the economic self-sufficiency and economic well-being of the people of New Mexico.</td>
<td>69%</td>
<td></td>
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</tbody>
</table>
### STRATEGIES:

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Percent Who Strongly Support</th>
<th>Percent Predicting High Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Identify specific, measurable goals. Track and share the results as well as coordinate efforts as appropriate.</td>
<td>55%</td>
<td>55%</td>
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<tr>
<td>B. Foster informal, organic networks between leaders of nonprofits, funders, foundations, government agencies, and interested corporate partners. Support more formalized network nodes as they evolve.</td>
<td>46%</td>
<td>46%</td>
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<td>C. Agree upon a communication tool to act as a go-to location for information.</td>
<td>48%</td>
<td>48%</td>
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<td>D. Share your progress and your successes both internally and externally, and correct course when needed.</td>
<td>44%</td>
<td>44%</td>
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<tr>
<td>E. Engage SHARE to measure progress and share data.</td>
<td>51%</td>
<td>51%</td>
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#### ACTION #2: Leverage internal and external resources to create and sustain positive change in the nonprofit sector and to better position nonprofits to be key players in solving New Mexico’s challenges.

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Percent Who Strongly Support</th>
<th>Percent Predicting High Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Create mechanisms to make volunteering easier in New Mexico by utilizing existing support structures (such as Share New Mexico), as well as designing outreach to engage underserved groups such as young people and retirees.</td>
<td>45%</td>
<td>45%</td>
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<tr>
<td>B. Foster leadership development through a variety of means, including:</td>
<td>67%</td>
<td>67%</td>
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<tr>
<td>- Mentorship programs</td>
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<td>- Joint training opportunities (including board development training)</td>
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<td>- Connecting existing programs with need</td>
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<tr>
<td>- Common reporting tools</td>
<td></td>
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<tr>
<td>- Peer support mechanisms</td>
<td></td>
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<tr>
<td>- Building grant-writing capacity (Grants Collective, Nonprofit Resource Group)</td>
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<tr>
<td>C. Utilize clearinghouse and central resources for:</td>
<td>58%</td>
<td>58%</td>
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<tr>
<td>- Information sharing</td>
<td></td>
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<tr>
<td>- Peer support</td>
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<tr>
<td>- Asset mapping (of existing programs and support)</td>
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<tr>
<td>- Common reporting tools (Share New Mexico key learnings)</td>
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<tr>
<td>- Best practices sharing</td>
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<tr>
<td>D. Maximize financial resources via a resource hub accessible to all nonprofits. Resource hub could include: bookkeeping, IT, financial, marketing, communication, human resources, and grants management advice and support.</td>
<td>52%</td>
<td>52%</td>
</tr>
<tr>
<td>E. Develop, promote, and educate others on funding strategies that are new, broad-based, collaborative, and sustainable (e.g. Heading Home</td>
<td>58%</td>
<td>58%</td>
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<tr>
<td>REC #</td>
<td>GROUP NAME</td>
<td>RECOMMENDATION</td>
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</tr>
<tr>
<td>4</td>
<td>Red</td>
<td>ACTION #1: Implement an inclusive, integrated system that strengthens nonprofits and works across communities to link resources, thus creating abundance for all New Mexicans (needs met and daily lives improved).</td>
</tr>
<tr>
<td></td>
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<td>STRATEGIES:</td>
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<tr>
<td></td>
<td></td>
<td>A. Create a nonprofit structure that provides leadership within the sector to: align efforts, provide a common language, and promote our community.</td>
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<tr>
<td></td>
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<td>B. Develop a communication infrastructure that allows for inclusiveness and voice from communities throughout New Mexico.</td>
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<td>C. Research existing successful models for strengthening the nonprofit sector.</td>
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<td>D. Generate community and political will (which could include):</td>
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<td>- Identifying a statewide nonprofit liaison to learn about local communities and brings information on resources and needs to the state.</td>
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<td>- Developing a strategic marketing plan that reinforces the human and economic impact of the non-profit sector.</td>
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<td>- Forming a work group to assist efficiency of relationships between sectors (e.g. use of data, technology, contracting, legal funds, etc.).</td>
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<tr>
<td>5</td>
<td>Brown</td>
<td>ACTION #2: Create a centralized resource infrastructure (could potentially be an organization) for nonprofits in urban and rural areas that is of such value that nonprofits and funders fully buy into it. This would allow for a sharing of resources, including but not limited to: training, political advocacy, public relations, communications and development.</td>
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<td></td>
<td>STRATEGIES</td>
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<tr>
<td></td>
<td></td>
<td>A. Streamline the sector by maximizing the efforts of efficient and effective organizations while lessening and removing support of ineffective organizations. Streamlining can include: aligning funders and donors, promoting successful groups and projects, and facilitating mergers and acquisitions.</td>
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<td></td>
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<td>B. Identify and leverage existing nonprofit resource programs, such as the Center for Nonprofit Excellence, Associations of Fundraising Professionals, Santa Fe Community Foundation (The Hub) and YNPN, to increase the quality of all nonprofits, including staff and board members.</td>
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<td>C. Create a hub where donated, essential physical items needed by nonprofits, and/or the people they serve, are inventoried and distributed or sold effectively and efficiently; share and consolidate back office services and resources.</td>
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<tr>
<td>REC #</td>
<td>GROUP NAME</td>
<td>RECOMMENDATION</td>
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<tr>
<td>6</td>
<td>Green</td>
<td><strong>ACTION #2: Push, promote, and expand non-profit organizations’ roles in “moving the needle” for New Mexico.</strong></td>
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<td></td>
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<td><strong>STRATEGIES:</strong></td>
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<tr>
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<td>A. Analyze programs, policies, and funding of New Mexico and other states to determine what is and isn’t effective.</td>
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<td>B. Build a clearinghouse for data sharing on a state, county, and regional basis; focused on critical service needs, demographic indicators, national rankings, and trends.</td>
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<td>C. Create a process for funders, grantees, service recipients, and their communities to work on issues, and develop strategies together.</td>
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<td>D. Recruit board members and develop partnerships with educational institutions, businesses, and government to implement entrepreneurial strategies.</td>
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<td>E. Support and advocate for New Mexico nonprofits on a national level to connect their work with external funding mechanisms.</td>
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<td>7</td>
<td>Green</td>
<td><strong>ACTION #1: Invest in education as a priority, engaging every sector to propel all New Mexicans, from birth to self-sufficiency and productive community membership.</strong></td>
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<tr>
<td></td>
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<td><strong>STRATEGIES:</strong></td>
</tr>
<tr>
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<td></td>
<td>A. Create a neutral forum of all stakeholders in education to create democratic, shared priorities and strategies, and define common outcomes and indicators (e.g. focusing on grade-level reading).</td>
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<td></td>
<td></td>
<td>B. Attack poverty as a root cause of low educational performance, aligning action among nonprofit, for-profit, and governmental institutions.</td>
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<td></td>
<td>C. Collaborate with nonprofits to develop a school-based system of family support centers focused on student success.</td>
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<td></td>
<td>D. Make New Mexico the first state to offer quality early childhood education to every child.</td>
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<td></td>
<td></td>
<td>E. Identify what is currently working in New Mexico to accomplish this goal.</td>
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<tr>
<td>REC #</td>
<td>GROUP NAME</td>
<td>RECOMMENDATION</td>
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</table>
| 8     | Orange     | ACTION #2: So that New Mexico nonprofits may improve the economic self-sufficiency and economic well-being of the people of New Mexico, cultivate SHARE New Mexico 2.0 as a communication tool to serve the following purposes: a.) Improve communication and coordination among nonprofits, funders, foundations, corporations, government entities, and individuals; b.) Provide tools to increase effectiveness of New Mexico nonprofits; and c.) Act as a resource for decision makers and media. STRATEGIES:  
A. Request status of development of the new version.  
B. Provide ongoing input as the tool is developed, e.g. by taking the survey.  
C. Use SHARE to share information about opportunities to network more broadly face-to-face. | 40%                          |                               |
APPENDIX B

SUMMIT PARTICIPANTS

Joell Ackerman  
Heading Home

Barbara Allender  
Community Volunteer

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Univision

Amanda Aragon  
Public Education Department

Max Baptiste  
We Are This City

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Julia Bowdich  
Rust Family

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Daly Consulting

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Intel

Ian Esquibel  
Learning Alliance

Chris Fitzgerald  
Rio Grande Credit Union

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LANL Foundation

Tara Gohr  
The Grant Plant

Cheryl Gooding  
Gooding and Associates

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Rio Grande Food Project

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ARCA

Krista Kelley  
Motiva Corporation

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JMK Solutions

Mike Kivitz  
Adelante

Catherine Kosak  
McCune Charitable Foundation

Frances Kunreuther  
Building Movement Project

Ben Lewinger  
Strategies 360

Michael Loftin  
Homewise

Emet Ma'ayan  
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Santa Fe Business Incubator

Dennis McCutcheon  
Con Alma Health Foundation

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Frank Mirabal  
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Center for Nonprofit Excellence

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Diane Ogawa  
PNM Resources Foundation

Christy Ortiz  
The Wellness Coalition

Rebecca Pierre  
Rio Grande Credit Union

Andrea Plaza  
Encuentro
<table>
<thead>
<tr>
<th>Name</th>
<th>Organization/Role</th>
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<tbody>
<tr>
<td>Carol Radosevich</td>
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<td>Henry Rael</td>
<td>McCune Foundation</td>
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<td>Roberta Ricci</td>
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<td>Jennifer Riordan</td>
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<td>Ed Rivera</td>
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<td>Kristin Rortvedt</td>
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<td>Randy Royster</td>
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<tr>
<td>Annie Sanchez</td>
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<tr>
<td>Nancy Sanchez</td>
<td>Project Safe Neighborhoods</td>
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<td>Peggy Sanchez</td>
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<td>Francisco Simbana</td>
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<td>Alan Webber</td>
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<td>Dathan Weems</td>
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<td>Helen Wertheim</td>
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<td>Susan Wilger</td>
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<tr>
<td>Wendy Wintermute</td>
<td>SHARE New Mexico</td>
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