Center for Nonprofit Excellence Transition Task Force Report

October 1, 2018

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Executive Summary

The New Mexican nonprofit sector landscape is as diverse, resilient and powerful as the physical landscape of the state. Collaboration and synergy exist within every ecosystem. With a statewide population of 2.1M, New Mexico has important opportunities to create partnerships and develop intentional support with its citizens. However, the rural nature of the state with the 5th largest landmass in the United States, creates distance between efforts. How can New Mexicans use social capital, technology and other assets to connect services?

Fortunately, several efforts exist to align work in the state, including the Center for Nonprofit Excellence, CNPE. For more than 10 years, CNPE has been a resource, trainer and connector for New Mexican nonprofits. Now, CNPE is positioned to move into its next iteration.

The United Way of Central New Mexico, UWCNM, and the CNPE Advisory Board partnered with Jean Block Consulting to inform the next steps for CNPE's evolution. Jean Block led a Transition Task Force that collected survey responses from 255 individuals, engaged 41 leaders who participated in focus groups and reviewed recent surveys and reports.

Focus areas emerged from the Transition Task Force's work including:
- Training, particularly for Board Development and Fundraising
- Job board
- Board and volunteer connections
- Statewide annual conference
- Advocacy
- Asset-mapping
- Central space for convening, sharing and supporting

The Transition Task Force presented its findings to UWCNM, CNPE and other local leaders September 13th. UWCNM and CNPE will use the information in this report to consider what's next for CNPE.

NOTE: The New Mexico Association of Grantmakers and Apex conducted a similar survey to the one offered by the Transition Task Force albeit without an articulated goal of developing a plan for next steps for the CNPE. The UWCNM, CNPE, Transition Task Force, NMAG and APEX coordinated in an attempt to have the two efforts complement each other. Please visit the NMAG website – www.nmag.org during the next few months to compare and contrast survey results.
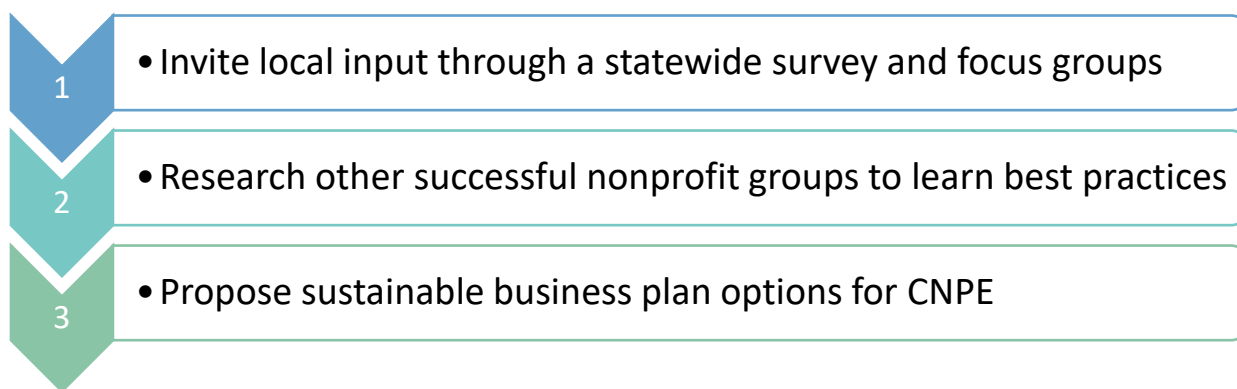
Overview

The CNPE has grown to a tipping point. After more than 10 years as a program of the UWCNM, the CNPE is exploring its viability and future with regards to its focus, geographic area served and financial sustainability.

UWCNM partnered with Jean Block Consulting, Inc. to establish an independent CNPE Transitional Planning Task Force - "independent" in that no Task Force member had a formal affiliation with UWCNM or CNPE.

Task Force Members: **Jean Block**, Jean Block Consulting, Inc. (www.jblockinc.com, jean@jblockinc.com), **Stephanie Sample**, Sample Consulting Studio, LLC (www.samplestudioconsulting.com, samplestudioconsulting@gmail.com), and **Ian Esquibel** (Oak Hill Coaching and Consulting, LLC, Ian.Esquibel@gmail.com) comprised the Task Force.

The Transition Team identified three phases of work:

1	• Invite local input through a statewide survey and focus groups
2	• Research other successful nonprofit groups to learn best practices
3	• Propose sustainable business plan options for CNPE

This report relays information concerning item 1and 3. Research into other groups to learn best practices is being undertaken by an employee of the UWCNM. A sustainable business plan will be generated by UWCNM and CNPE leaders.

Methodology

The Task Force collected local input as qualitative and quantitative data through focus groups, surveys and literature reviews.

Focus Groups

The Task Force hosted ten focus groups: seven for nonprofits (five in Albuquerque, one in Santa Fe, one virtually with leaders in Las Cruces and one led by the United Way of SE New Mexico on behalf of the task force); one for consultants; and one for funders/capacity-providers. The 41 nonprofit participants included executives, staff, and board members. Agencies and organizations represented large, medium and small in scope and history. The duration of focus groups ranged from 90 to 120 minutes.

Stephanie Sample and Ian Esquibel guided small and large group discussions around sector needs and solutions for sector problems and challenges. Facilitators used "DeBono's Thinking Hats[1]" to discuss revenue-generating ideas, positive outcomes of those ideas, risks/threats of those ideas and emotions created by the ideas (Focus Group agenda listed as Appendix I). Jean Block compiled notes during the meetings and transcribed handwritten notes documented on flip-chart paper. (Raw Data listed as Appendix II).

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[1] http://www.debonogroup.com/six_thinking_hats.php

Survey Overview

UWCNM invited approximately 4500 individuals on their listserv to complete a survey posted on Survey Monkey July 17 - August 30, 2018. 255 individuals responded: self-identifying as 194 nonprofit professionals, 14 funders and 47 consultants. Text responses were coded for common themes.

Nonprofit Participants. 100% of respondents who started the survey completed it. 44% of survey respondents identified as board members, 49% as executive directors, 16% as program staff, 13% as administrative staff and 23% as volunteers. Nonprofits of various sizes responded to the survey including: 33% of respondents worked with an organization whose budget is greater than 1 million dollars, 11% were between $500,000-$1,000,000, 24% were between $150,000-$500,000 and 32% of respondents work with an organization whose budget is less than $150,000. Participating organizations ranged from organizations with an entirely volunteer staff to those with over 31 staff employees. 12% are all volunteer. 28% of organizations who participated have 1-3 employees. 28% have 4-15 employees and 32% have 16-31+. Organizations from around the State gave their, with the largest segment of respondents based in Central NM and Northeastern NM.

Consultant Participants. 95% of respondents stated that consulting is their primary service, with 54% specializing in trainings. 88% of Consultant respondents are located in Central NM with 9% in Southwestern NM and 2% in Northeastern NM. Business sizes ranged from 0 (6%) to 16+ (2%), with the majority of consulting businesses reporting 1-3 employees (68%). Gross Revenue ranged from 45% reporting 0-$50,000, 27% reporting $50-$150,000, and 7% reporting $150-$250,000. 15% reported gross revenue of $500,000. 21% of respondents reported operating in New Mexico for 16+ years, with 20% operating for 7-10 years. 19% have existed for 4-6 years and 17% have existed for 1-3 years. 6% of consultant respondents have operated for less than a year.

Funder Participants. 35% of respondents identified as community foundations, 28% as private foundations, 14% as United Way, 14% as a public funding source and 7% as private corporate foundation. 69% are located in Central New Mexico with 23% in Southeastern New Mexico and 8% in Northeastern New Mexico. The majority of funder participants (42%) reported 1-3 employees, with 14% reporting both 4-7 and 8-15 employees. 21% have 16+ participants. The majority of funder participants' annual operating budgets (30%) were $500,000 or less with 23% reporting a budget of $1-2 million and 15% reporting $500-1million, $2million-$5 million and $5 million+ respectively. 50% of funder respondents have operated for 21+years. 21% report 16-20 years of operation. 14% report both 1-5 years and 6-10 years of operation.
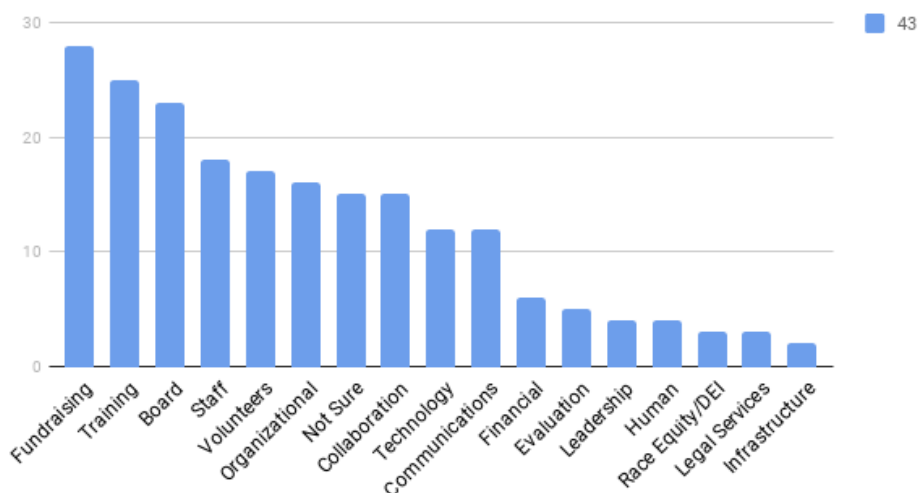
Greatest Training Need.

61% of respondents on the **Nonprofit Survey** listed Fundraising as their greatest training need. The second highest need identified was training for Board of Directors at 47%. The third highest training need was Communications and Marketing at 37%.

Fundraising was identified as the top capacity support needed for organizations with 28 out of 172 respondents.

The top capacity building needs reported were: Training, Board Development, Additional Staff and Additional Volunteers.


Capacity Building Needs

The **Consultant Survey** mirrored the first and second highest training needs, (Fundraising 65% and Board of Directors at 56%) with the third highest training need identified as Leadership (40%). Financial Management, Evaluation and Collaboration were the next three highest needs.

Q1 What are your clients' greatest training needs? [Check top three]
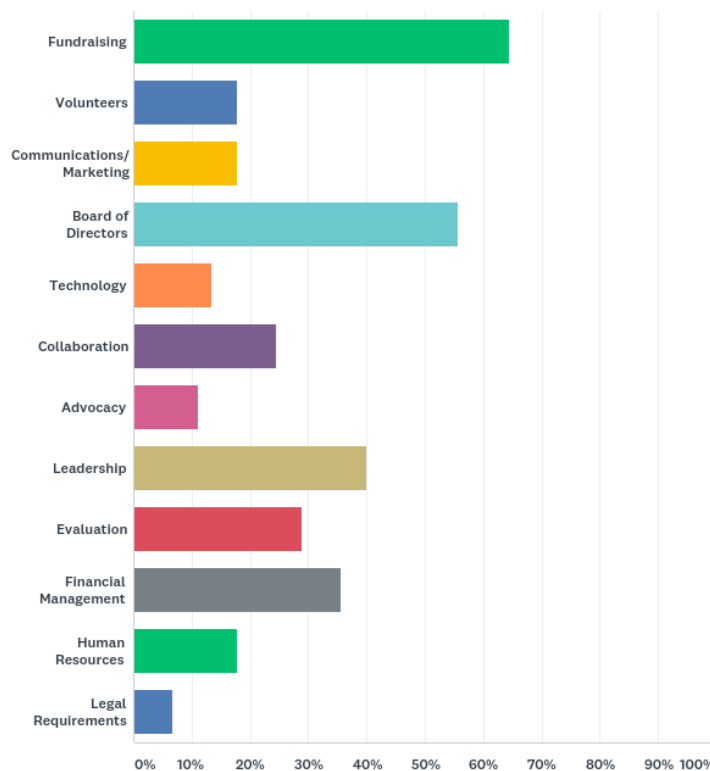
The **Funder Survey** mirrored the first highest training need from the Nonprofit and Consultant Survey responses (Fundraising 28%). The second highest training need Funders identified was equally: Collaboration and Financial Management (both 21%). Evaluation, Leadership and Board of Directors were the next three highest needs.

Q1 What are your grantees' greatest training needs?
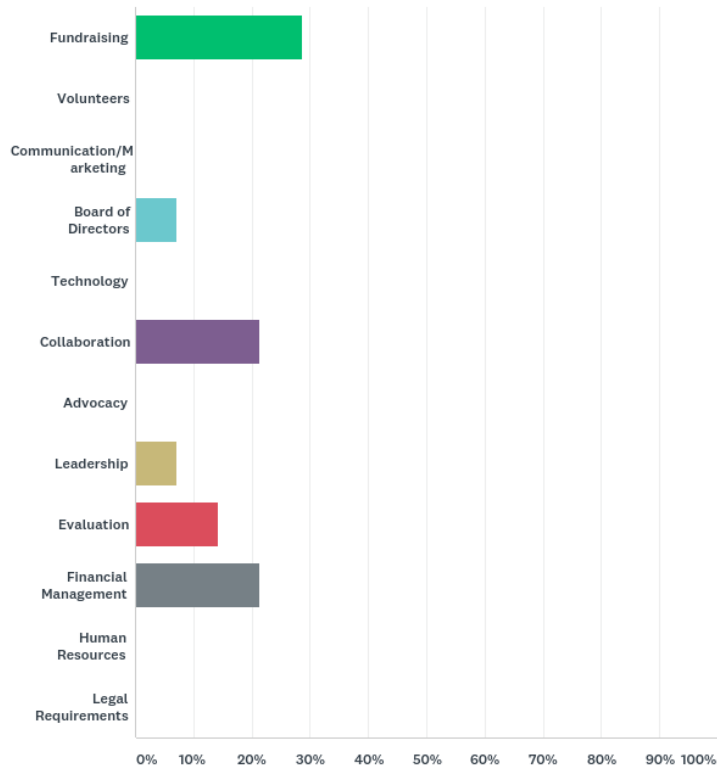
Gap Analysis.

Sixty percent of **Nonprofit** survey participants responded "None" or "I don't know" when asked to identify similar groups to the CNPE. Most respondents concluded that the CNPE currently provides unduplicated services. 40% named thirty groups who offered similar services.

The groups identified by **Nonprofits** include: *Association of Fundraising Professionals, Attorney General & Secretary of State, Back Office Resources, Board Source, Chambers of Commerce, CNM, Community Foundations, Consultants, Give ABQ, The Grant Plant, The Grants Collective, Guidestar, Impact & Coffee, Leadership ABQ, NC for Frontier Communities, Ngage New Mexico, New Mexico Association of Grantmakers, Nonprofit Resource Group, Planned Giving Roundtable, industry specific resources, Share NM, SINC, The Management Center, Thrive NM, The United Way, YNPN.*

The groups identified by **Consultants** include: *Las Cruces Green Chamber, Community Foundation of Southern New Mexico, Ngage New Mexico, Share NM, NM Thrives, The Grant Plant, Nonprofit Resource Group, NM Association of Grantmakers, Association of Fundraising Professionals, SINC, SCORE, WESST, Community Foundations, The Grants Collective, Nonprofit Quarterly, Colorado Nonprofit Association, Center for Frontier Communities, Phillipines Council for NGO Certification, Credibility Alliance, WESST, Share NM, and Nonprofit Resource Group.*

Funder participants were asked **"What's most useful about the Center for Nonprofit Excellence to your organization? Choose the top three."** Funders responded: *Training & Technical Assistance (both 46%), Volunteer Connection (38%), Job Announcements (31%).*

Other services Funders noted as valuable were: *New Mexico Nonprofit Principles and Practices Guide, Online Resource Library, Technical Assistance, Nonprofit Director, Community or online/Webinar training listings, and the Grantmaker Directory.*

Nonprofit Association.
35% had nil to low interest in a Nonprofit Association. 45% reported medium interest in a Nonprofit association. 14% had a high interest with 6% reporting a very high interest in a Nonprofit Association. 56% reported they would like the Association to be statewide and 44% said they would like it to be regional. When asked which benefits would be most desirable from the Association, the number #1 answer was Board Training. Board Training, Leadership Training and Ethics Training were recommended services/benefits of a Nonprofit Association. See the chart below for full detail of needs respondents listed.

Q8 What benefits would you find most desirable for a membership based nonprofit association?
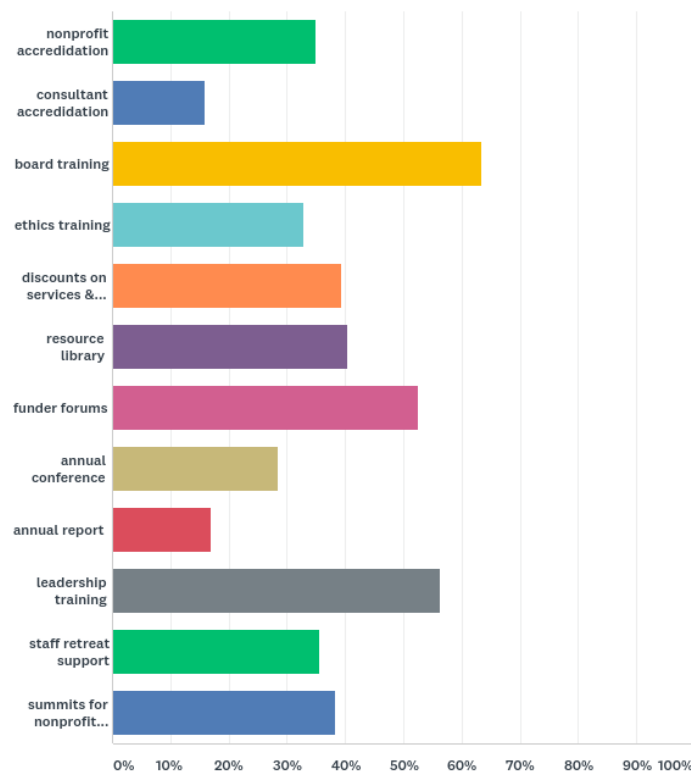
Certification Program

51% of **Nonprofit** survey respondents said they needed more information before answering questions about how much they might pay for a nonprofit certification program offered through a Nonprofit Association. 34% reported that they would pay for a certification program, with the majority - 22% choosing less than $1,000 as a feasible cost.

60% of **Consultant** respondents answered "Yes" to the question "Would you see value in a statewide accreditation program for consultants?" 46% said they would pay less than $200 for a consultant accreditation valid for multiple years. 30% would pay between $200-$350 and 8% would pay between $500-$999.

In answer to the question: "Many statewide nonprofit associations have implemented a nonprofit certification program with best practices and training for a fee. Would you find this useful as a way to vet or prioritize requests for funding from New Mexico nonprofits?" 64% of **Funders** said Yes, 36% said No. 71% said they would support a Nonprofit's desire to be certified.

Statewide Consultants' Directory.

70% of **Consultants** would be interested in being listed in a statewide consultant directory for an annual fee. 53% responded that they would pay less than $100 for the listing, while 44% would pay between $100-200 for the listing and 3% would pay $200-$350.

Statewide Conference

84% of **Nonprofit** survey respondents and 89% of **Consultant** survey respondents said they would attend a statewide annual conference that provides training, and networking opportunities for the sector. 60% of **Nonprofit** respondents said they would pay $250 or less for a 2-day conference with 34% reporting they would pay between $250-$500 and 6% said they would pay over $500 for a 2-day conference. 47% of **Consultant** respondents said that they would pay less than $100 for a 2-day conference and 45% would pay between $250-$500 for a 2-day conference. 71% of **Funders** said they would attend a statewide annual conference. 53% said they would pay $250-500. 38% said they would pay less than $250 and 8% said they would pay $500-750.

Capacity Support for the Nonprofit Sector in New Mexico.

In response to the question **"In general, what capacity support does the New Mexico nonprofit sector need to be more successful",** two prevailing themes from **Nonprofit** Survey Respondents are**:** Collaboration (20% of respondents) and Financial Resources (22% of respondents).

Responses also included: Accounting support, Advocacy, Board Development, Collaboration, Community Involvement, Education about resources, Evaluation Support, Executive Director Convening, Diversity, Equity and Inclusion Training locally, Financial Resources, Financial management training, Funding for general operating expenses, Fundraising support, Human

Resource development, Industry growth in New Mexico cities, IT support, Leadership Training, Legal support, Management support, Minority Voice, Networking, Operations Support, Race Equity, Regular training, Standards training, Support from Government, Support for Homeless populations, and Volunteer Recruitment Training.

In response to the same question, prevailing themes from **Consultants** are: Training (29% of respondents) and Financial Resources (27% of respondents).

Responses also included: Fundraising, Board Development, Leadership Training, Training, Social Justice Work, Collaboration, Consolidation/Mergers, Funding, Support from Funders, Best practices guide, Accountability, Evaluation Training, Strategic Planning Support, Financial Management Training, Mentorship, Fundraising and Major Gifts Training, Fewer Regulations, Funding for Operations support, H.R. Support, Wage Increase, Cultural Inclusivity.

When **Consultants** responded to the question **"What capacity support would catalyze your clients to better serve their stakeholders?"** they answered (in order of highest %): Increased financial resources, Strategic Plans & long-term support, Board Development, Communications, Confidence, Racial Equity, Mentorship.

Funders were asked the same question **"In general, what capacity support does the New Mexico nonprofit sector need to be successful?"** 31% of Funders responded that Collaboration is what the nonprofit sector needs to be successful and 31% responded "Unknown", "Too general". 23% responded that the capacity support needed for success is Fund development, Growth of financial resources and Sustained funding sources. Other responses included: Evaluation training and Leadership from the board of directors.

Literature Review

The Task Force and a UWCNM development team reviewed surveys, reports and national models. The group identified promising practices that generated revenue and created a powerful network of nonprofits (Surveys and Reports reviewed listed as Appendix IV).

Survey/Report *Lead Organization*	Findings
Nonprofit Executive Director Survey 2018 *Ngage New Mexico*	Top 5 Professional Development Interests: 1. Fundraising 2. Grant Writing 3. Board Development/Responsibilities 4. Marketing & Communication 5. Diversification of Funding Streams What Are Your Biggest Challenges? • Fund development • Board issues • Staff issues
Statewide Survey Highlights *New Mexico Thrives*	9,542 nonprofits serve about 50% of residents. Nonprofits contract with: consultants, accountants, evaluators, fundraisers, grant writers, graphic designers, HR experts, IT experts, marketing experts, web masters. Nonprofits engage 356,415 volunteers in 54.77M hours of service. In their last fiscal year, among nonprofits in New Mexico: • 22% Carried balances • 50% Dipped into reserves • 40% Had less than 3 months operating capital • 63% Had breakeven financials or a deficit
CNPE Summary Presentation 2018 *CNPE*	Technical Assistance by Topic: ▪ Board Development – 20% ▪ Financial Management – 13% ▪ Fundraising – 12% ▪ Start Up – 12% Website: ▪ Jobs Board received the most traffic within the last year – 222,516 page views. ▪ Top "Resources" – Board Development (22,012 page views).

Nonprofit Sector Strategic Planning Summit 2016 *NM First*	Potential reforms within the nonprofit sector: • Create a formalized hub to align efforts, information and resources. • Diversify funding strategies. • Identify and promote best practices. • Advocate for nonprofits, including the needs they address. Potential reforms between multiple sectors: ▪ Improve communication and collaboration. ▪ Build network and mentorship opportunities.

The **CEO Nonprofit Roundtable** partnered with **NM First** to compile a background report prior to the **Strategic Planning Summit** hosted in 2016. In that report, two sections may be of particular interest:

STATEWIDE ASSOCIATIONS

New Mexico's challenges – including: accessing economic data, understanding which nonprofits are doing what, or duplicating some efforts – are lessened in other states with nonprofit associations. For example, Colorado and Arizona both have much more comprehensive reporting on their nonprofit sectors. The Colorado Nonprofit Association's mission is "to lead, serve and strengthen Colorado's nonprofit organizations." Similarly, the Alliance of Arizona Nonprofits "is a statewide organization of, by, and for all Arizona nonprofits." This organization's website, combined with Arizona State University's Lodestar Center, presents in depth information on their nonprofit sector, updated annually. Con Alma Executive Director Delores Roybal is specific about the model of support she would like to see. "Membership organizations are dinosaurs; they can't be sustained solely on dues. There are models in other states where funders and grantseekers can share infrastructure support. One director, one big mission, and one set of staff sustain the whole system in an integrated way." The organization for which she works feels so strongly about this model – and Roybal agrees – that "Con Alma would consider helping fund a shared aligned infrastructure – if there were support for this model." (Background Report – Nonprofit Sector Strategic

Case Study – NGO New Mexico

New Mexico had a statewide association for nonprofits (2004- 2009). It convened nonprofit conferences, offered training and networking, provided technical assistance, created a resource center and centralized database, had as a goal securing group benefits for members, and advocated for the sector. Initially directed by Dolores Roybal, who now leads Con Alma Health Foundation, "NGO-New Mexico was part of an effort by a coalition of stakeholders who advocated against changes that would have harmed the nonprofit sector. Our ability to assist to the degree we did was, in part, based on the network we'd built."

Organizational and financial challenges prevented NGO-New Mexico from continuing past 2009. After the organization closed its doors, other groups began filling some of the gaps. The Center for Nonprofit Excellence and Share New Mexico are two such efforts. The question remains whether New Mexico needs a statewide association and, if so, how to prevent duplication with existing efforts. *(Background Report – Nonprofit Sector Strategic Planning Summit, p.28)*

Focus Groups Observations

Detailed results from the **Focus Groups** can be reviewed in **Appendix II**. In general, these observations emerged from across all focus groups:

- ❖ **Definition of capacity building** varies widely; perhaps an over-used 'trendy' term that can confuse conversations when applied broadly to providers and users within the nonprofit sector.

- ❖ There is a desire for more **collaboration** between nonprofits, but there is no perceived strong sector leader to lead the way, guide, encourage, support collaborative efforts.

- ❖ There is a desire for a **strong advocate** for the sector who can represent the sector's diverse needs at the state and local level, to enhance the public image of the sector, to educate the public about the sector's impact.

- ❖ An accessible, updated **matrix of the sector** would help eliminate duplication, help nonprofits easily find answers to questions and where to get help.

- ❖ Focus group participants all said **training** was important, with more than just short overview/general training, more intensive, best practices, longer term engagement with learning groups and peers. Fundraising and board training were strongly desired.

- ❖ The idea of **certification** was intriguing, but there was reticence about the potential cost.

- ❖ Many suggested they would like to have a central source for **sector information**, including a **central space** for convening, sharing, supporting each other.

- ❖ The support for an **annual conference** was strong.

- ❖ While some felt a **statewide organization** was optimal, many shared concerns about geographic restrictions and 'identities' as a barrier. **NOTE:** NM Thrives is a statewide membership association.

- ❖ The survey respondents showed little interest in a **membership association**, but focus groups were generally in favor, citing enhanced buying power for services, a stronger 'voice' for the sector, problem solving, and a centralized system for communication, database, information sharing, etc.

❖ Larger nonprofits did not see particular value in the **CNPE's** products and services, but small and medium sized nonprofits wanted assurance that it would survive and grow.

❖ **Training, the job bank** and the **volunteer connection** were all named as **beneficial services** to the whole sector.

❖ The CNPE's **Principles and Practices Guide** was only referenced once in focus groups. We believe this is a timing issue, not a reflection on the value of the Guide itself.

Recommendations for CNPE Areas of Focus

The Transition Task Force recommends that the CNPE should leverage its recognized assets and strongly focus on opportunities to optimize revenue generation to reduce its reliance on traditional funding sources. The CNPE should also reduce or abandon other offerings that do not support these key competencies.

Additionally, the CNPE should continue ongoing research and listening to its customers to seek enhancements and new opportunities.

Detailed recommendations were submitted to the CNPE Advisory Board and representatives of the United Way staff and Board of Directors at a September 13, 2018 meeting.

Appendix I - Focus Group Agenda

I.   Introduction and Fun Facts

II.   Purpose and Process
    a. Develop plan for an independent and sustainable CNPE based on demonstrated customer/stakeholder needs.
    b. Team of three independent nonprofit professionals not connected with CNPE or United Way:
        i.   Led by Jean Block, pro bono
        ii. Stephanie Sample and Ian Esquibel (small stipend for facilitation only, otherwise pro bono)
    c. Survey and focus groups July-August.
    d. Report and recommendations to CNPE Advisory Board by year end.
    e. Presented to United Way Board early 2019.

III.   Explanation of Terms

IV.   Discussion – Defining Capacity Building/Other Efforts

V.   What Could CNPE's Role Be In This Environment?

VI.   Discussion: DeBono's Thinking Hats Model
    a. Green Hat – Ideas
    b. Yellow Hat – Positive Outcomes
    c. Black Hat – Risks
    d. Red Hat – Emotional Response

VII.   Discussion – What Else?

VIII.   Plus/Delta

IX.   Close …What If?

Appendix II Focus Groups Raw Data

Group One – July 31 morning – Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Creating/supporting board building, orientation, education
- Focused on an agency's growth and outcomes
- Collaboration with others for support
- Advocating for the sector: community awareness, information on federal guidelines, explicit advocacy for operating policy
- The 'other white meat' – educating, changing public opinion about nonprofits
- Getting out in front – leading and speaking for agencies
- Help in measuring outcomes: how nonprofits be more effective in understanding and acting on outcomes of their work
- Helping funders and governments align instead of having various objectives to be met
- Certification program might help agency's build capacity

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations? Answers: (Grouped by Categories for This Report)
- ❖ *Products/Services*
  - Resource: How to start a nonprofit to build a solid foundation
  - Create a local taxonomy – where do nonprofits fit (geographic and service wide)
  - White paper library
  - Match executives with nonprofits who need staff

- ❖ *Resource/Guide/Trainer*
  - Up to date national info relevant to nonprofits
  - Board development training
  - How can nonprofits be more effective by measuring and reporting outcomes?

- ❖ *Leader/Influencer/Advocate*
  - Evidence-based thought leadership and research
  - Coordinating entity for state – connector, conductor, broker of cross services
  - Champion, spokesperson for the sector at local, state and federal level
  - Move public opinion about the sector
  - Fostering collaboration – educate nonprofits how to collaborate – take a leadership role with agenda for outcomes
  - Build relationships with other sectors on behalf of nonprofits
  - Policy, advocacy and education
  - Nonprofit "Rain Forest" sharing space
  - Be a Meta Level connector

- Address disconnects and increase understanding between nonprofits
- Enhanced collaboration within the sector
- Alignment for meeting community needs
- Tool for government to determine how it effects the whole sector
- Board member connections to others to gain a broader view
- Improve image and professionalism of the entire sector
- Recognize power in numbers
- Cross silo information
- Help nonprofits interact with others in the same classification
- Gain meaningful response from board service

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?

- Pushback, disagreement, collaborative partner bailing: "I'm better on my own"
- Private sector sense that it's not their responsibility to coordinate for best community outcomes
- Risky for CNPE to be embedded in a funder
- Advocacy: Risk to being neutral – can issues remain neutral and not a party issue?
- Reacting to a policy presented without a strategy to be proactive
- Relying on existing partnerships and ignoring grass roots elements/voices. Leaving out smaller partners.
- Taxonomy – might increase silo mentality
- How the CNPE is funder could influence its effectiveness
- These ideas take money to implement

Red Hat Question: What Emotions do These Ideas Generate?

- Frustration that ideas are generated and input sought and nothing happens
- Fear that the little guys/small grassroots nonprofits might only get the crumbs
- Fear of losing autonomy, turning things over to someone else, 'you are not performing"
- Excitement around Rain Forest idea – a board room, leadership and staff interacting from several agencies
- Fear that we will keep concentrating on negatives, scarcity mentality
- Caution – not be hasty

What Else? Other Thoughts?

- How can we move things forward for the sector that don't fit within the CNPE's purview?
- CNPE – Be the Hub – Be the Rainforest
- Small organizations must be supported
- Keep equity at the forefront. No one answer.
- Focus locally, specifically, rural and throughout the state

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?
- NM would be in the top 10% nationally
- We'd have an established level of excellence
- We would accomplish what we talk about and people would come and stay
- Internal self-worth and pride
- Partnerships between public, private and philanthropic sectors

Positive Feedback for This Process
- Overview of terms helpful
- Small group discussions within the larger group
- Color hats format
- Small group overall helpful
- Variety of participants
- Time allotted

What Would Improve This Process?
- More hints about who is doing what in nonprofit capacity building landscape
- Are there already parameters in place defining the CNPE purview?
- Dig into how CNPE fits into the nonprofit environment
- Define what is unique about CNPE

Focus Group Overview
- 5 participants: Executive Directors, Staff, Board Member
- Facilitated by Stephanie Sample and Ian Esquibel
- Held at ARCA

Group Two – July 31 Afternoon – Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Operational support for agencies
- Skill building for agencies to improve outcomes, services provided, etc.
- Trainings, online resources
- Fiscal sponsorship
- Archive institutional memory

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?

Answers: (Grouped by Categories for this Report)

❖ *Products/Services*
- Produce an annual conference
- Continue useful tools: volunteer matching and job board

❖ *Resource/Guide/Trainer*
- Actively promote best practices – no redundant training classes, grounded in research into what works – survey what's working
- Certification program a good idea
- Provide consistent standardized protocols for best practices across industries
- Develop capacity <u>within</u> organizations creating opportunities for self-sufficiency – training from subject matter experts within their own organizations
- Be responsive Answer People for the sector, email and 1-800-
- Continue to be a valuable resource for small, grass-roots nonprofits

❖ *Leader/Influencer/Advocate*
- Identify organizations that have similar missions and facilitate meetings and collaboration
- Convene, enhance collaboration by providing tools for collaboration – how it works

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- CNPE could have a new abundant funder 'home' with new, expanded services
- No longer affiliated with United Way
- Could generate revenue through memberships
- Increase revenue through aggressive sale of Guide
- Could generate revenue through certification process
- Could revision purpose and services
- Could enhance awareness in the community of what CNPE provides/successes, etc.

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Could show no value and great risk without subject matter expertise, models, resources, tools
- Big price is a deterrent - could proportion fees to budget size of users?
- Must ensure sustainable leadership (staff and board) for CNPE
- Moving from a parent organization has risk
- Loss of job board and volunteer placement

Red Hat Question: What Emotions do These Ideas Generate?
- Skeptical of outcomes: will they benefit me?
- Fear of losing services for small agencies
- Fear of losing a valuable resource

- Hope – cleansing
- Encouraged

What Else? Other Thoughts?
- Nonprofit sector is so diverse – very large to very small with such a diversity in scope of services– who should the CNPE serve?
- Where else could CNPE live?
- Does CNPE need to be a standalone entity?
- Must be successful locally first, before reaching statewide
- CNPE must know its clients
- What could partnership with private groups look like?
- What does CNPE need to be sustainable?
- Requires strong leadership from staff and board

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?
- A strong 3-legged stool: government/nonprofits/business
- Great lives for all New Mexicans
- NM at the top of the lists, not the bottom
- More ability to work on bigger issues, e.g. poverty, homelessness, etc.
- Positive legislation and policy
- Efficient government

Positive Feedback for This Process
- Could address change of CNPE leaving UWCNM

What Would Improve This Process?
- Better participant knowledge about CNPE currently
- Hard to provide input without more background about CNPE, history, services, etc.
- Ideas for other methods of data gathering

Focus Group Overview
- 5 participants: Executive Directors, Staff, Board Member
- Facilitated by Stephanie Sample and Ian Esquibel
- Held at ARCA

Group Three – August 2 Morning – Nonprofit Leaders

Discussion: Defining "Capacity Building"
- "Trendy"
- Maximizing the value of services provided – not quantity, but quality

- Ability to focus on what people want – people buy what benefits them
- Maximizing the social aspect of an agency – brand awareness, consistency
- Growing according to needs as they change – managing change
- Serving constituents
- Ability to develop info for yourself to continue to grow

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)

- ❖ *Products/Services*
  - Could raise and give money to sustain other initiatives (example give: the NM Ethics Alliance folded due to lack of funds)
  - Job bank and Volunteer matching program are important resources

- ❖ *Resource/Guide/Trainer*
  - What is state of the art? Could provide cutting edge tools for the sector
  - Help and training for boards and staff in best practices
  - Coaching in how to 'sell' your organization's value
  - Mentorship program, succession planning
  - Board development and training
  - How do national issues and trends affect us?
  - Quality Improvement models
  - How business best practices can translate into nonprofit profitability

- ❖ *Leader/Influencer/Advocate*
  - The sector needs a collective voice for representation at higher levels
  - Promote strategic alliances and partnerships
  - Base for nonprofit partners, empowering people who are the 'boots on the ground' to leverage their unique contributions
  - Advocate for policy and high standards

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- Needs to be broad and statewide
- Could find and understand customer needs, producing a blend of social, relationship and business (intersectionality of needs)
- Meeting a high demand for services
- Opportunity to offer statewide impact to reduce overhead and lower expenses to agencies through multi-buyer opportunities: insurance, back-office, buying power maximized

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Competition
- Scarce resources to pay for needed services
- Advocacy – how to choose the 'right' side.

- Who defines the standards of ethics? What is ethically 'right'?
- Serving with one voice – needs to be ethically right – dealing with risk if organizations disagree
- If CNPE services go away, there are consequences that could hurt the social sector
- Could risk being too specific in services
- How do you fund these programs and services?

Red Hat Question: What Emotions do These Ideas Generate?
- Appreciation for the process
- Frustration - NM and our challenges
- Happy
- Patient
- Supportive – need for better understanding of CNPE value
- Don't want good things to go away

What Else? Other Thoughts?
- Huge need for services – we would pay to belong to something that provided training – staff, leadership, best practices, cutting edge
- Nonprofits need to have 'skin in the game' to pay for products and services they need
- Reality in NM – high poverty, large number of nonprofits are competing for resources: need to inject business modeling into the nonprofit equation
- There is little sector alignment and cooperation
- We want to find out what our peers are doing and how they meet challenges
- Entrepreneurial mindset for nonprofit sustainability
- How would CNPE sell services that have been free? Answer: After initial push back, if the offering brings real value, they will pay for it
- Must understand customers, their budget cycles, how to provide needed and values products

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?
- With revenue behind it, and staff to provide it, the whole statewide picture provides more opportunities
- The sector pulled together to promote peer learning and best practices – huge impact!

Focus Group Overview
- 2 participants: Executive Directors
- Facilitated by Stephanie Sample and Ian Esquibel
- Held at Home Builders Association of Central New Mexico

Group Four – August 2 – Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Support/provider: training for management and staff
- Collaborative efforts
- Understanding of impact of new laws and policies
- Many other providers/groups/resources providing this now

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)
- ❖ *Products/Services*
  - Job Board and Volunteer Connection are very important resources
  - Certification program based on national best practices for agencies and individuals
  - Nonprofit Directory – by categories of services, size, etc. to allow for interactive and collaborative efforts
  - Matrix formatted for easy searching on a variety of 'matches' – live tagging to promote immediate interaction with peers, etc. . More engaging than just a directory – live, tags, real time
  - Current and updated Grantmakers Directory
  - Consultant directory

- ❖ *Resource/Guide/Trainer*
  - More in-depth, specific training (less basic and generic) with follow up sessions, coaching and mentoring with subject experts – deeper training programs, e.g. fundraising over the course of a year with coursework
  - 1:1 business classes
  - Clearing house for research
  - Advocacy training – how to do it, messaging, etc.
  - How to provide services in different languages, cultures
  - Training in nonprofit skills, management, legislative impacts
  - A resource for consultants

- ❖ *Leader/Influencer/Advocate*
  - Represent sector on big picture issues e.g. gross receipts tax
  - Promote and sustain point of contact affinity groups, e.g. emerging practitioners, ethnic/diversity/inclusiveness/cultural sensitivity – advocate for access to resources
  - Provide a space for 'safe' talk and sharing
  - Center for broadcasting important information to the sector

- Could be the Gold Standard for networking
- A certification program could provide a stamp of approval for funders and donors, provide a direct link to how agencies meet funder requirements
- Effective training for individuals and agencies could attract more funding
- Could provide a free, relaxed, safe, open environment for nonprofit leaders, staff to recharge, share, support each other, problem-solve issues of management, staffing, board, etc. CNPE could become the hub/broker for other providers
- Serving as fiscal agent could reduce numbers of nonprofits, Reduction of dilution of funds
- Cohesive list of who is doing what - Increased efficiency and effectiveness in the sector
- Make nonprofit employment a viable choice for professionals

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Fear of losing funding, critique, risk, fear of losing capacity building
- Losing CNPE – loss of connection/synergy
- Who will talk about racial justice/equality in our sector? Pew Research: nonprofit leadership is predominantly non-Hispanic. Proliferation of white male leadership
- How does race affect our services? Are we considering how we can better provide our services? Excluded individuals won't seek our services
- Territory – stepping on others' toes. Offending other capacity builders
- Proliferation of duplicated services
- What is our motivation? Muscle out other providers? Identify others to destroy?

Red Hat Question: What Emotions do These Ideas Generate?
- Skepticism about the purpose of this process
- Enthusiasm
- Energy

What Else? Other Thoughts?
- This project is like eating an elephant. Maybe should start with something smaller and more sector-related to build momentum and change what we can change
- Will there be blow-back from other capacity-providers?
- We need to demand more money for what we provide – we have done too much for too little for too long
- Will outcomes be a community voice? We need to stand up to funders, educate public about priorities, limits to underfunded services
- Need to be goal-oriented in the process

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?

- New headline: "Less Bad News" There is so much good news that it dominates
- NM most vulnerable citizens meet minimal standards in food, housing, education, medical services, transportation, etc.
- NM is a vibrant, equitable place to live
- NM is the leading edge in the future

Focus Group Overview

- 3 participants: Executive Directors, staff
- Facilitated by Stephanie Sample
- Held at YMCA Horn Branch

Group Five – August 7 – Consultants/Trainers

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations? Answers: (Grouped by Categories for This Report)

❖ *Products/Services*
❖ Asset and Resource Map - comprehensive map of nonprofit landscape (who, what, where)
- Monetize the Job Board – Monster.com revenue model
- Serve as a fiscal agent
- Job board, volunteer match is useful
- Be the One Stop Shop for capacity and sustainability

❖ *Resource/Guide/Trainer*
- Training videos – on line – anyone could download for small fee (volume $ model)
- Partner with the State to mandatory competency training; without it, a higher cost to start a nonprofit – generate revenue for CNPE through the accreditation process
- If nonprofit is out of compliance with Secretary of State – send them to CNPE school – accreditation program
- Provide/broker mentorships
- Could be a shared space – incubator for capacity building

❖ *Leader/Influencer/Advocate*
- Model after Leadership Abq/Leadership NM: attend groups, gain access to people, training, ideas, etc.
- Aggregator – provide access to lower costs for basic services through volume buying power
- Be a membership organization – provide access to lobbyists, tiers of membership
- Find the hurt point for nonprofit failures – what it costs funders, services, clients, etc. and develop a tool to increase successes.

- Educate the top 100 companies who support nonprofits about supporting sector needs as a whole...distribute funding...could CNPE take a management fee for coordinating?
- Educate top 100 company's giving officers about how to get the biggest bang for their nonprofit investment bucks.

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- New Mexico is no longer at the bottom of the lists
- Respect for the sector as a key economic developer
- Legitimize the sector
- Increase inter-agency connections and break down turf.
- CNPE could do more than it has, not become stagnant
- Better definition for CNPE in relation to other similar service providers
- "A rising tide floats all boats"
- A more holistic approach to problem solving and meeting community needs – address the root causes – generates more support and more money

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Convincing board and others to buy in and understand this is a long process
- Scarcity mentality
- Danger of having 'cool' stuff taken by others
- Risk adverse culture
- Organizations accessing similar resources for free
- Does CNPE have the capacity and competence to take on these ideas?
- Requires start-up capital
- Loss of credibility and brand dilution
- Competition with other groups offering resources
- Slow to adopt
- Adding a layer of bureaucracy
- Diverting funds from other nonprofits
- Splintering

Red Hat Question: What Emotions do These Ideas Generate?
- Is it so bad if CNPE goes away?
- Hope this goes somewhere
- Desire for change
- Optimism
- Frustration that we can't seem to figure this out
- Despair that nothing ever moves the needle
- Want to hold on to a sense of relief (teenager leaving home)
- Positive energy in this process
- Sense of opportunity

- Feeling of right timing
- Fear of unknown, unclear, confusion about who will lead
- Sense of urgency
- Desire to share and commit
- Honor the complexity of this process

What Else? Other Thoughts?
- What is the ultimate outcome we want?
- Is a statewide association necessary?
- Have to make a commitment and stick with it
- Sense = greater than just Albuquerque
- Asset inventory – PEOPLE, CNPE is not leveraging this successfully
- There is a need for contracting the sector, yet we are trying to support and strengthen nonprofits – what about letting them fail? Should we be focusing on those that are doing the best?
- A certification program would give those with demonstrated results more funding and support
- Would a certification program be statewide?
- Funders are the key to stimulate and enforce change
- Keep the name of CNPE – brand recognition and reputation – could update logo, website, etc.
- CNPE does for nonprofits what WESST does for small businesses (assistance/resources/training). Could the CNPE merge into something like WESST or the business incubator at CNM or the UNM/Anderson School to take advantage of the org infrastructure already in place

What Would Improve This Process?
- Liked small group discussions…liked the larger group discussions
- More pre-work, e.g. online journaling of ideas with reminders and deadlines
- Pre-readings (short)
- Copy of survey as a reminder

Focus Group Overview
- 10 participants, Consultants
- Facilitated by Stephanie Sample and Ian Esquibel
- Held at Home Builders Association

Group Six – August 15 – Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Providing connections to resources (information, funding, links to providers)
- An agency's capacity and ability to serve their mission
- A path to growth
- It is a vague term

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)
- ❖ *Products/Services*
- Job Board and Volunteer Connection are great services
- Guide can be a great tool
- Access to webinar production equipment, services, space to produce training for nonprofits

- ❖ *Resource/Guide/Trainer*
- Need to hear national voices and experts at training
- Encourage board member participation in training, not just nonprofit executives
- Create a pool of 'Job Ready Board Members', especially for emerging organizations to share trained board members; a database of who is serving on boards
- See Board Source example – state and issue and invite input from others in the sector
- A place to hold meetings and training for 60+ available for agencies

- ❖ *Leader/Influencer/Advocate*
- The Nonprofit Chamber of Commerce – driven by the sector, not funders
- Advocacy – the voice of the sector at the legislature and elsewhere. Currently there is no call to action to respond to information presented.
- Encourage and model collaboration with other service providers, e.g. AFP's info sharing sessions, discussion groups around best practices
- Promote value of sector to economic development – work within that environment to promote large nonprofits to locate here
- Work with the legislature to remove obstacles to contracting efficiently with state providers and agencies

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- Stimulate relationships between the nonprofit sector and government
- Increased participation on boards
- Potential board members would know what agencies do, what they expect from board members so they will be more prepared to serve
- Enhanced board member longevity, commitment

- A unified voice to speak to collective sector needs at the legislature and elsewhere; share the value of the sector statewide
- There is power in a collective voice
- There could be a safe place for nonprofit work groups to work on issues
- Funding partners could be more collaborative
- Could work with economic development to attract national nonprofit-related businesses
- Create a path for younger sector professionals for job growth and satisfaction – a resource for talent development – recruit and retain younger board and staff – agencies could create sector-wide career paths

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Conflicting agendas need to be accommodated – could be a barrier to a 'collective voice'
- We have a history of inability to work collectively
- Funding – who? How?
- Size differences of nonprofits could be a barrier – smaller agencies are afraid of losing resources to larger agencies, high-jacking their ideas
- Habitual funding by funders – funding what they know and have funding rather than funding other unknown as yet organizations
- Funders demand collaboration but are not aware of the potential impact. Collaboration for collaboration's sake could be unrealistic and inefficient. Forcing collaboration sometimes makes agencies who cannot sustain themselves wait longer to merge, fold, etc.
- How do you engage nonprofits? Some might feel they are inexperienced, fear of embarrassment
- There are lots of conversations but seldom any outcomes or feedback
- Many current efforts have not gained the respect of the sector – are perceived as outsider driver versus peer driven
- Pool of corporate giving has shrunk and is redirected from philanthropy to brand-awareness and marketing – there needs to be a balance
- Collaboration should result in efficiency – CNPE and other should focus on what they each do well and not drain resources
- Don't recreate the wheel – what else is working?
- Danger of no funding for CNPE going forward. What if there is no funding to implement CNPE's new vision?
- What is the sustainable model for CNPE?
- What if a funder likes the new model for CNPE and takes it?

Red Hat Question: What Emotions do These Ideas Generate?
- Overwhelmed, challenged
- Skepticism – won't come to fruition
- Fear of unknown
- Grateful to be listened to

- Jealous of markets that don't have our issues, e.g. Boulder
- Questioning – how will it happen?
- Fear that wisdom will be stymied, driven by money and the vision will be lost
- Fear – lack of financial assets
- Fear – appropriation of these ideas to the detriment of the sector
- Fear of CNPE living inside a funder and missing mission
- Excitement – awesome opportunity

What Else? Other Thoughts?
- What can we learn from other states?
- Wary of Certification
    - Could it exclude smaller agencies, be out of their reach?
    - Could it apply to smaller, well-functioning nonprofits?
    - Could it be seen as a barrier to funding?
- How active is the CNPE Advisory Board?
- How will the Advisory Board participate in the process? What are their ideas? When will they be shared? It would be a missed opportunity not to engage them. Encouraging the Advisory Board to "Think Big"
- Can CNPE's negative brand equity override the vision? Would it be better to start from scratch?
- This conversation has amazing potential for the sector. The Number One obstacle is involvement – hoping the outcomes will result in increased support for the entire sector

What Would Improve This Process?
- Chocolate! Coffee would be nice
- Liked the hats process
- Like the centralized location

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?
- Headline: CNPE provides a voice for nonprofits at the legislature
- Headline: Nonprofit sector drives NM from 50th to 1st in the US
- Headline: Major national nonprofit relocated to SE Albuquerque

Focus Group Overview
- 5 participants: Executive Directors, Volunteer
- Facilitated by Stephanie Sample
- Held at YMCA

Group Seven– August 16 – Santa Fe Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Expansion of resources to do the work
- Capital
- Sustaining the work
- Decision-making that anticipates future needs
- An environment where vision/ideas can be held
- Data-driven architecture for data

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)
- ❖ *Products/Services*
  - Replicate fiscal sponsorship services: offering a packet of resources, technical assistance and templates with standards for fundraising, HR, etc.
  - Back office resources for fundraising – doing it for small, rural agencies
  - Online resources, library, for everything a nonprofit needs, webinars, manuals, how-tos

- ❖ *Resource/Guide/Trainer*
  - A way to adopt and share standards of practice
  - A system for facilitating and sharing collaboration, defining collaboration
  - Training before starting a nonprofit job
  - Mentoring
  - Consultant Hub
  - How to start a nonprofit – a continuum of training and support
  - Standards
  - Be a connector, e.g. Firespring, NP Hub, etc.

- ❖ *Leader/Influencer/Advocate*
  - Resources are needed for diversity, equity, inclusion

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- Happy nonprofits in rural communities
- Healthy staff members who are cross-trained and share information
- Better business practices via collaborations, diversified funding, e.g. social enterprises
- Funders will be driven top grant to successful organizations
- A center to attract gifts for the sector from national funders
- Economic developer for rural NM
- Succession planning – attracting and training talent and diversity to the sector
- Nonprofits offer viable career choices
- Changed perception of nonprofit sector

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?

- Self-directed education on line isn't always effective because it requires self-sacrifice and follow up
- The sector is risk-averse, reverts to old habits even though we know we need to move forward and change
- Shifting is hard – can't leave people behind
- Sector is mired in comfort zone, culturally
- Lack of higher learning, e.g. accepting higher technological fluency
- Association with United Way – a lack of trust
- Individualism – turf – valued above collective impact – reluctance to collaborate
- Shifting sands in funding world – what will the impact be?
- CNPE must be careful not to duplicate services, e.g. Grant Plant
- Differentiation is the key for CNPE

Red Hat Question: What Emotions do These Ideas Generate?

- Excitement, enthusiasm, hope
- Disappointment
- Mistrustful
- Overwhelmed
- Fear
- Eagerness to tap untapped potential; magnetism to create change
- Confidence
- Passionate
- Uncertainty
- Proud
- Satisfaction
- Appreciate being heard

What Else? Other Thoughts?

- Would agencies pay a fee? Yes, if CNPE can prove its value
- Statewide vs. local/regional? Albuquerque is seen as a viable resource, but distance can be a barrier to taking advantage of services
- Community Foundations were unsuccessful in collaborating – reinforces individual above collective impact
- What can I do personally to make sure this level of conversation continues?
- How about setting up community representatives from each community to meet monthly to keep this discussion alive and make something happen?
- People closest to the problem are closest to the solution – ask and listen
- So many other efforts in the last 5 years – consultant's café, Linked in groups, learning circles, HUB programming at SFCF, NM First gathering…
- Poop or get off the pot!

What Would Improve This Process?
- Liked the DeBono's hats – allowed for clarity and covered all aspects
- Liked diverse levels of experience and focus
- Size of group was good (smaller so everyone can speak)
- Appreciated the humor by facilitators
- Want to know what the follow up plan will be
- Where is the business sector at the table?

What's Possible for NM if Nonprofits Have their Needs Met by Capacity Building Efforts in our State?
- Headline: Massive Collaboration Taking Place Among New Mexico Nonprofits – A Leading Model for the Nation!"

Focus Group Overview
- 6 Participants: Executive Directors, Staff, consultant/board member
- Facilitated by Stephanie Sample and Ian Esquibel
- Held at Santa Fe Community Foundation

Group Eight – August 20-21 – Conversations with Funders

Observations from the Funder's Perspective
- Struggle with research and evaluation issues: Funding is moving in the direction of results based accountability and evaluation. The "old days" grants were made based on feeling. It's all about impact. If you say you're going to do it, did you do it? How well did it work? If you got off course, why? And what did you learn? And can you course correct?
- We're not paying for the research or evaluation piece of the grants. National funders will build in a "technical assistance" part of the grant. For large funders you have access to their research team. Otherwise, funders might build in a line item for independent researchers who will quantify the results.
- From a capacity building standpoint, having trainings or free/reduced cost in research and evaluation would be invaluable. If there were some sort of program that could offer access to "how to" start approaching research and evaluation. It would help nonprofits secure more funding and help funders. It would help us make better informed grants-- strategic and effective grant making.
- Going back to directives that funders have: looking at time, value, money, it would be hard for us to meet with S. New Mexico grantors with specific objectives based on directives...it's entirely different. Maybe if we were meeting to talk about ideas/strategy. The topics of discussion would have to be around bigger best practices vs. what we're doing in our community. Shared philosophies. Would like to see an out of state network.

Similar cities like Detroit, Memphis, how they are addressing poverty, race and education. It would be really interesting & helpful as a funder.

Green Hat Question: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)

❖ *Products/Services*
- The Job Board is extremely useful
- Training is valued – could be leveraged into other parts of the state
- Encore Fellows has great potential statewide

❖ *Resource/Guide/Trainer*
- A program that could offer access to "how to" start a nonprofit. Currently sending inquiries to CNPE and SINC
- How to do research and evaluation of programs and services (see notes above)
- An online system to facilitate conversations with groups that are addressing the same issue
- Incubate collaboration and communication: bring cohorts together for shared learning, joint problem solving
- CNPE could help bridge the gap in understanding about what a funder is and what they do...and vice versa. You should see your funders, they are not OZ, transparency. Not a group of 10 or 300, not a funders' talking heads, but a conversation
- CNPE could bridge communication gap between funders and nonprofits. Like the funders forum has been re-enlivened 2 years ago. Joint RFPs but nobody knows it
- A training on how to approach your funders
- A funders' tract, looking at best practices in surrounding states

Yellow Hat Question: Assets, Positives, Highest Potential for Good Outcomes of these Ideas?
- Positive approach for CNPE: It's all NEW. Part II. Version II
- CNPE grew up, this was what it was supposed to be all along
- People realize it's statewide as opposed to it being incubated in Central New Mexico

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- The CNPE would have to show the real value of a membership association, especially in ways to create peer group connections
- Standards for Excellence would be a hard sell for us due to funding priorities and restrictions; Struggle with giving preferential treatment to groups with a seal (accreditation), because we want to make sure we're representing the community. What if they can't afford the seal?
- There is a gap----nonprofits don't realize that we are raising money too. As much as you have to show results to us, we have to show results to donors, our board

- Rebranding without United Way. How to do that? Forget the negative. It is something different.
- Giving it away forever, but showing what the value is so that people will pay for it. Because it's been close to free, a mindset shift needs to happen
- There is not a sense of partnership between funders and nonprofits.

Red Hat Question: What Emotions do These Ideas Generate?
- Let's go back to work. Okay. Transition. Move-on
- Readiness
- Non-emotion
- Do something
- Steve Jobs left Apple, there wasn't some gigantic group therapy thing when it floundered. Jobs came back and it got back on track

Overview
- 2 Participants/volunteers
- Facilitated by Stephanie Sample

Group Nine – August 28 – Las Cruces Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Bringing more people together
- Creating collaborative efforts between organizations
- Capacity within an organization to have the tools to implement and deliver services for themselves and those they serve

Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations? Answers: (Grouped by Categories for this Report)
❖ *Products/Services*
- Standards and best practices
- Job board and Volunteer connection are valuable assets

❖ *Resource/Guide/Trainer*
- Facilitate networking and collaboration among nonprofits to reduce duplications and share/link to other resources
- Support for sustainability in nonprofit operations
- Support with grants and grant writing
- A statewide resource/network for referrals, connections, contacts for nonprofits and those they serve

❖ *Leader/Influencer/Advocate*
- Support allocation of funding to directly solve problems

- A statewide network for nonprofits and clients to see what is available
- Ability to help people more quickly and efficiently – could connect clients directly to services

Black Hat Question: What are Risks, Potential Negative Outcomes to these Ideas?
- Isn't this what Share NM does? Although their model is difficult to navigate (have to join, input data, keep it updated which could be a barrier to many)
- There is a sense in Southern NM that they are stepchildren…are not being heard and served…so they have filled the gaps there with programs and services.
- There are many strong and active collaborations and networks existing in Las Cruces area that are locally based and trusted
- If CNPE competes for funding with those they serve, it would detract from current funding for other similar programs and service providers

Red Hat Question: What Emotions do These Ideas Generate?
- Excited and positive about a centralized information source
- Positive – it could happen

What Else? Other Thoughts?
- It would be great to have a way to find funding for collaborations or other specific initiatives (who is funding what). Funders could pay for this.
- The CNPE has left gaps and others have filled them

What Would Improve This Process?
- Good ideas presented and good to hear what others think
- Liked the format
- Not sure what we are trying to achieve here

Overview
- 3 Participants: Staff, Board/Volunteer, Consultant
- Facilitated by Stephanie Sample and Ian Esquibel

Group Ten – August 30 – Clovis/Portales Nonprofit Leaders

Discussion: Defining "Capacity Building"
- Staff- needing more to handle more projects
- Infrastructure- How does the agency's books look? What does the board look like? How does the board support the agency?
- Services- Providing more training for the board members

**Green Hat Question: Ideas: What Could CNPE's Role Be to Support Nonprofit Organizations?
Answers: (Grouped by Categories for this Report)**

❖ *Resource/Guide/Trainer*

- Traveling to the locations needing assistance versus traveling to Albuquerque.
    i. Cost benefits/ time benefits as well as safety.
    ii. Host Virtual conferences
    iii. Break down the barrier of distance preventing or reducing the rural programs attendance.
- Consultation services
    i. Being able to have a person with the knowledge available to contact for support and training.
    ii. Would this be something worth having a small membership fee?
- Networking
    i. What is our network and how do we know who we are competing with for funding and who we can possibly support?
- Help create a regional list/data base of foundations or funders?
    i. The current one "Grant makers" is out dated.

Overview

- 5 Participants: Staff, Board
- Facilitated by Erinn Burch, United Way of Eastern New Mexico

Appendix III – Local Surveys and Reports Reviewed

"**CNPE Summary – August 2018**." Presented by Larry Alei & Kira Luna.

"**New Mexico Thrives Statewide Survey Highlights**." New Mexico Thrives and Pivot Evaluation. Retrieved from https://static1.squarespace.com/static/57cdaba8f5e231f790822e2d/t/5b7dc2c01ae6cf8700f43492/1534968512989/NMThrives_SurveyHighlights.pdf

"**Nonprofit Executive Director Survey 2018**." Sponsored by Ngage New Mexico and the McCune Foundation, compiled by Center for Community Analysis, New Mexico State University. Received a hard copy attached below at the [Las Cruces Convening]

"**Nonprofit Sector Strategic Planning Summit**." Convened by NM First and the CEO Nonprofit Roundtable. Retrieved from file:///C:/Users/Ian/Downloads/Nonprofit+Summit+Final+Report+w+sponsor+page.pdf

"**Nonprofit Sector Strategic Planning Summit – Background Report**." Convened by NM First and the CEO Nonprofit Roundtable. Retrieved from file:///C:/Users/Ian/Downloads/Nonprofit+Summit+Background+Report+5-23-16.pdf

Nonprofit Executive Director Survey 2018

Key findings from a survey exploring the strengths, needs, and challenges of nonprofit executive directors in Southern New Mexico.

1 out of every 6 executive directors are in unpaid positions

TOP 5 Professional development interests
- Fundraising
- Grant writing
- Board development/responsibilities
- Marketing & Communication
- Diversification of funding streams

What are your biggest challenges?

- Fund development (grant writing, raising funds, diversification of funding): 55%
- Board Issues (ineffective, not involved, micromanaging, etc.): 16%
- Staffing Issues (staff retention, lack of staff, ineffective staff): 12%
- Navigating state legislature/politicians/advocacy: 6%
- Accounting/Budget Management: 4%
- Volunteer Recruitment: 4%
- Marketing and Communication: 2%
- Organizational Infrastructure (policies and systems): 2%

Any final thoughts?

"I find that leadership is an art form. What works in one environment does not work elsewhere. Further, I believe the key is being successful with both the team and the board. Often, there is conflict. The board may not be in alignment and the staff or team has needs that must be met."

"I view our organization as a social profit organization instead of a nonprofit organization. We are creating a positive change in our community."

"Working collectively is vital to success. The non profit leader must learn to partner with other organizations."