



# New Mexico Nonprofit Support System Landscape Study Final Report

Final Report  
November 2018

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# Acknowledgements

Apex sincerely appreciates the many individuals and organizations who contributed their time and information to this study. In New Mexico, this included Steering Committee members, nonprofit and funder survey respondents, rural and tribal nonprofit interviewees, nonprofit support organization interviewees. In other states, this included executive directors and other leaders who graciously shared information about service models, partnerships, funding, challenges, and future opportunities. The commitment and innovations of so many nonprofit and support organizations was humbling and inspiring.

The findings in this report are based on systematic approaches to collecting and analyzing data as described in the Methods section. Apex did not independently investigate the accuracy or completeness of information reported by study participants or the effectiveness of nonprofit support organizations included in this study. All results and recommendations are presented in good faith. The findings and conclusions do not necessarily reflect the opinions of project funders and stakeholders.

It is our hope that this report, combined with other data, reports, and initiatives, will lead to improved strategies for supporting New Mexico's nonprofit sector that are equitable, effective, and sustainable.

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# Introduction

This study is intended to help funders, grant-making nonprofits, and the nonprofit sector in New Mexico prioritize and take action on key strategies to better support the sector as a whole as well as individual nonprofit organizations. There was strong consensus among Steering Committee members and study participants widely agree the status quo is not good enough. They want to see action.

# Study background

In February 2018, the **New Mexico Association of Grantmakers (NMAG)** released a Request for Proposals to conduct an Assessment of Capacity Building to Strengthen New Mexico's Nonprofit Sector. The Introduction stated, "New Mexico funders have a vested interest in ensuring that the statewide nonprofit sector has the information, support and resources required to operate in an efficient and effective manner to meet the needs of the people and communities they serve." A Steering Committee comprised of funders and nonprofit representatives provided input throughout the study.

**Apex** was selected to conduct the study. Apex is an Albuquerque-based consulting firm founded in 1999 and specializing in systems evaluation. Apex is founded on the belief that evaluation can and should add value to the work that is being evaluated and contribute to thriving organizations, programs, individuals, and communities. Apex's clients are primarily nonprofit and government entities, and team members have substantial experience working directly in the nonprofit sector.

There have also been **other initiatives** to improve the nonprofit support system in New Mexico. From 2004-2009, New Mexico had a statewide association for nonprofits called NGO New Mexico. In 2016, NM First led a Nonprofit Sector Strategic Planning Summit and wrote an accompanying report. Another recent study examined the future role of the Center for Nonprofit Excellence; recommendations from that study should be considered in addition to the current report.

The current study builds on and adds to previous work, especially by getting input from nonprofits across the state. Data collection and analysis will always be an ongoing endeavor, but collectively, this study combined with previous efforts provides insights that are substantive and actionable.

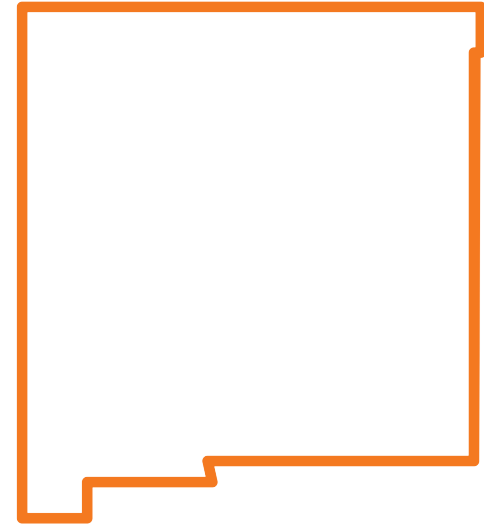
The following entities contributed to funding this study:

- Albuquerque Community Foundation
- Community Foundation of Southern New Mexico
- Con Alma Health Foundation
- McCune Charitable Foundation
- New Mexico Association of Grantmakers
- New Mexico State University Foundation
- Sandia National Laboratory
- Santa Fe Community Foundation
- Taos Community Foundation
- United Way of Central New Mexico

# New Mexico's nonprofit sector

The NP sector is a major economic force in New Mexico. While the sector's full economic return on investment is challenging to calculate, the NP sector includes:

- ✓ 9,104 registered NP organizations. 6,500 of these were 501(c)(3) public charities and 380 were private foundations. (2013 data)
- ✓ Fewer than half of these (38%) reported income or assets on their tax returns. This means many NPs are very small (less than \$25,000), volunteer-led organizations. (2012 data)
- ✓ There were 33.5 NPs for every 10,000 people in New Mexico. This was just below the national average of 35.1 but the number of NPs per person varies dramatically from 20.9 in Nevada to 149.2 in Washington DC. (2013 data)
- ✓ 48,000 employees, or 8.1% of the state's workforce. (2010 data)
- ✓ More than \$6.5 billion in annual revenues. (2015 data)
- ✓ Assets of almost \$15.7 billion. (2015 data)



Independent Sector. (2016). The Nonprofit Sector in New Mexico. Accessed on 11/9/18 at <https://independentsector.org/resource/state-profile-new-mexico/>

Urban Institute, National Center for Charitable Statistics (NCCS). Number of Registered Nonprofit Organizations by State. Accessed on 11/9/18 at <https://nccs.urban.org/sites/all/nccs-archive/html/PubApps/reports.php?rid=34>

UNM. (2006). The Economic Impact of Nonprofit Organizations in New Mexico. NGO-New Mexico and New Mexico Association of Grantmakers. Accessed on 11/9/18 at <https://bber.unm.edu/media/publications/EconImpactofNMNonprofits.pdf>

### Developing a framework

To help synthesize information from the literature review, Apex designed a **Nonprofit Support System Framework** (illustrated on the next page). It is intended as a first step towards building consensus about what a support system for NPs should include. Most existing models primarily focus on “capacity building” services provided directly to NPs. The Framework draws most heavily from David Renz’s chapter in the 2009 Nonprofit Quarterly Study on Nonprofit and Philanthropic Infrastructure.

The Framework language attempts to overcome challenges identified during the study with terms like “capacity building” and “nonprofit infrastructure.” The whole system is simply called the “Nonprofit Support System.” The other terms are not used in the Framework or this report unless they are direct quotes from participants.

**Funding** anchors the NP Support System. This includes the funding system for nonprofit organizations themselves as well as for the NP Support System as a whole.

**Values** include key underlying values for how the NP Support System is created and how it functions that emerged from Steering Committee members and study participants. The Steering Committee and any other structures that emerge from this study will want to review these draft values and come to consensus on values to which the initiative is committed.

**Services** includes Sector-level, Nonprofit-level, and Communication/Information sharing. **Sector-level services** are those conducted for the sector as a whole, although clearly nonprofit organizations are engaged in various ways with these services. This study focused on the sector-level services of **advocacy, networking & collaboration, and data & research** because these seemed to best reflect the Steering Committee’s interests. The Framework also shows that sector-level services should be “strategically coordinated” but they do not necessarily have to be done by the same organization.

**Nonprofit-level services** are those provided directly to NP organizations. This section is most closely related to services that are often called training, technical assistance, capacity building, or consultation. Nonprofit-level services should ideally be designed and delivered using innovation and a higher degree of collaboration between partners providing these services in order to serve NPs most efficiently and effectively.

**Communication/information sharing** has its own section because NPs and other stakeholders in the NP sector need to access and receive information about all aspects of the NP Support System, including funding, sector-level services, and nonprofit-level services. Ideally, communication and information sharing will have some degree of centralization so NPs do not have to check numerous website for information and do not receive emails from many different entities about similar topics.

# Introduction | Nonprofit Support System Framework

## Funding for nonprofits and services

- Multi-year commitments
- Coordinated applications
- Realistic outcomes
- Alignment across funders

## Values for support system

- Diversity, equity, inclusion
- Community knowledge
- Transparency and trust
- Innovation
- Continuous improvement
- Broad geographic reach

### Sector-level

#### Advocacy

- Public education
- Legislative advocacy

#### Networking & Collaboration

- Conferences
- Funders + nonprofits
- Collective impact
- Resource sharing

#### Workforce Development

- Degree programs
- Early-career programs
- Mid-career programs

#### Data/research

- Funder data
- Sector data
- Community data
- Best practices

#### Accountability

- Transparency
- Performance
- Standards

*Strategic coordination*

### Nonprofit-level

#### Types

- Assessment: *What do I need?*
- Training: *Show me how*
- Consultation: *Walk with me*
- Peer learning: *Share with me*
- Shared services: *Do it for me*

#### Format

- In-person
- Virtual
- Cohort

#### Intensity

- One-time
- Longer-term
- Just-in-time

#### Content

- Board development
- Leadership development
- Strategic planning
- Strategic partnerships
- Program design
- Fundraising/grant writing
- Evaluation
- Volunteer management
- Communications/marketing
- Human resources
- Technology
- Accounting/financial

*Innovative collaboration*

### Communication/Information sharing

#### Audiences

- Nonprofit Support Organizations
- Funders
- Nonprofits

#### Channels

- Websites
- Emails
- Directories
- Events

*Centralized delivery*

Services



Domains	Research Questions	Nonprofit Survey	Funder Survey	Rural/tribal Nonprofit Telephone Interviews	Nonprofit Support Orgs Telephone Interviews	Case Studies (Other States)	Secondary data
<b>Resources &amp; Gaps</b>	What components of New Mexico's nonprofit support system are strong? What components need work? What are the top priorities?	X	X	X	X	X	X
<b>Current Funding for NP Support System</b>	How much are New Mexico funders already funding parts of the nonprofit support system? Which components are they funding and how much?		X				X
	How are organizations/entities that provide nonprofit support services in New Mexico currently funded?				X		
<b>Barriers &amp; Disparities</b>	What are barriers to accessing nonprofit support resources for nonprofit organizations in New Mexico? How does access vary by geography, populations served, budget, and other factors?	X	X	X	X		
<b>Models &amp; Best Practices</b>	What are potential models/best practices for building New Mexico's nonprofit support system?					X	X

**Note:** Earlier versions of this table used the terms “nonprofit infrastructure” and “infrastructure providers.” Based on the NP Support System Framework developed during the study, these terms have been replaced with “nonprofit support system” and “nonprofit support organizations.”

Data	Analysis approach	Software
Quantitative survey	Survey data were collected in QuestionPro and the raw dataset was exported for analysis. Data recoding and cross-tabulations were conducted in SPSS. Because cell sizes were small in many cross-tabulations, statistical analyses were not conducted. In general, differences of 10 percentage points between two different groups were considered to be practically significant.	SPSS
Qualitative survey and interview	All telephone interviews were audio-recorded. Detailed notes taken during each interview were organized by key domains. Every qualitative response from the nonprofit survey and rural/tribal nonprofit interviews was systematically coded with one or more codes. Codes were developed based on survey questions, research questions, and inductively from the data. Individual codes were grouped to create larger themes. Qualitative responses from the funder survey and NP support organizations were reviewed to identify additional examples and themes. In general, the report indicates whether any given theme was shared by a few, some, or many participants. In qualitative methods, a theme based on a few participants may be just as meaningful as one that is based on many.	Excel
Geographies	Maps were created based on geographic variables of zip code, county, and/or city. Data were sorted and aggregated in Excel prior to importing to Tableau. Standard layers were used in Tableau for population density, county boundaries, and city locations.	Excel Tableau
Case studies	Telephone interview notes were reviewed for themes. Websites and secondary documents were reviewed as necessary for additional information. Similarities and differences in structure, services, philosophy, and partnerships were identified.	n/a

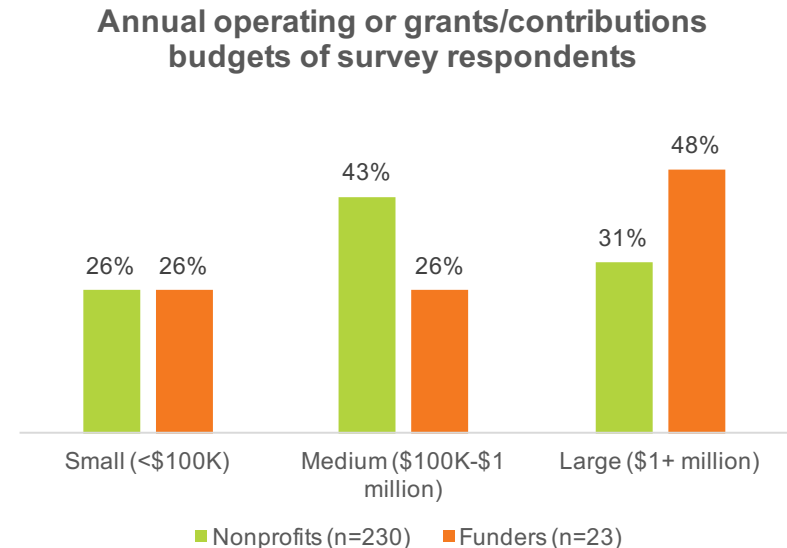
## Introduction | Literature Review

This is a brief summary of contributions from several key national reports that informed the design, data collection, analysis, and reporting of this study. We also reviewed existing New Mexico reports which are described in the parallel CNPE study report.

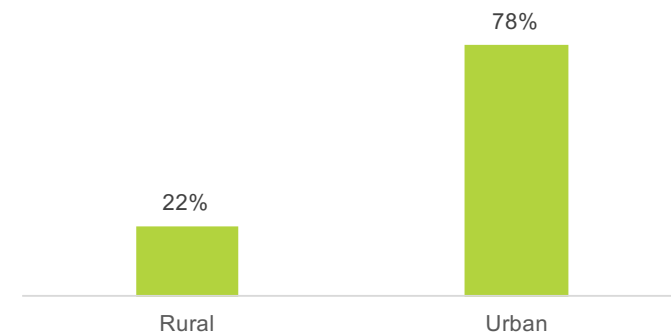
Source	Key concepts
Point the Way Chicago-area Capacity Building Landscape Study Final Report (Learning for Action, 2017)	Report from similar study of nonprofit infrastructure landscape in Chicago. Includes model of nonprofit capacity with 7 components: Vision & impact model; Strategic relationships; Resource generation; Internal operations & management; Governance and leadership; Program delivery; Evaluation & learning. Model for methods, analysis, and report synthesis for current study.
An Assessment of Capacity Building in Washington State (2009, The Giving Practice)	Report from similar study of nonprofit infrastructure landscape in Washington State. Includes a list of eight essential elements of a resilient nonprofit ecosystem such as Nonprofit 101 resources, organizing and advocacy capacity, and multiple strategies to identify and support leadership.
Capacity Building 3.0: How to Strengthen the Social Ecosystem (TCC Group)	Described 3-level model for capacity building: 1.0 – Individuals in nonprofits; 2.0 – Nonprofit institutions; 3.0 – Social sector ecosystem. Capacity building 1.0 is fairly traditional training and technical assistance whereas 3.0 assesses where an organization is in the social sector ecosystem, supports organizations with change management, and engages partners like businesses and governments with nonprofits, support organizations, and communities.
The Nonprofit Quarterly Study on Nonprofit and Philanthropic Infrastructure (2009)	One section describes 10 components to the nonprofit infrastructure: accountability & self-regulation; advocacy, policy, and governmental relations; financial intermediaries; funding organizations; donor and resource advisers; networks and associations; workforce development & deployment; education & leadership development; capacity development & technical assistance; research and knowledge management; and communication & information dissemination. Another section describes financial models for nonprofit infrastructure organizations based on economic theory.
The State of Nonprofit America, Infrastructure Organizations (2012)	This chapter reviews the history and evolution of nonprofit infrastructure organizations especially at the national level and identifies current challenges and directions for the sector.
Are You Being Served? Toward a Typology of Nonprofit Infrastructure Organizations and a Framework for their Assessment (2018, Prentice & Brudney)	This published article is written about academic nonprofit research centers but much of the information applies across nonprofit support organizations. Specifically, the authors divide “nonprofit infrastructure organizations” into those serving primarily the nonprofit sector as a whole compared to those who directly serve nonprofit organizations and their staff. They also include a third category for organizations that build social capital and increase cross-sector collaboration at the community level.

## Number and description of study participants

Method	Number
Nonprofit survey	305
Funder survey	35
Rural/tribal nonprofit interviews	16
NP support organization interviews	18
Case study interviews	13 representing 6 states and north Texas



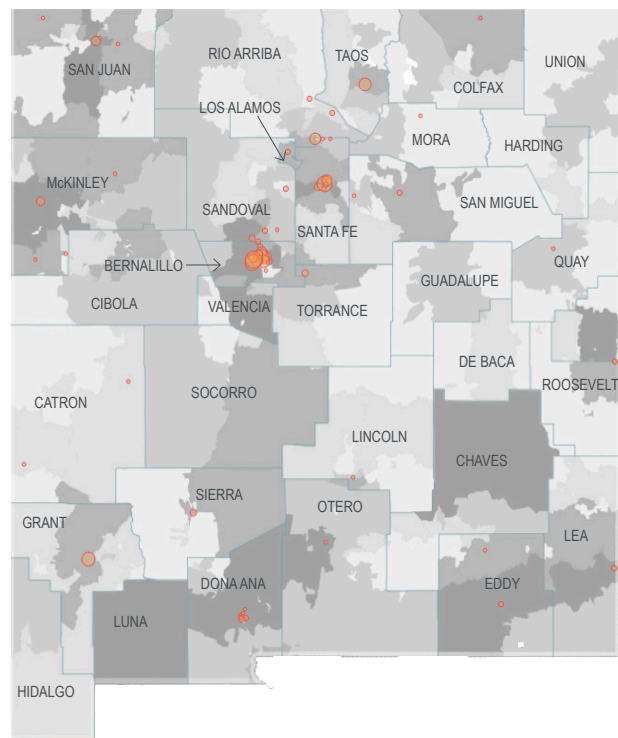
**Urbanicity\* of nonprofit survey respondents' primary office location (n=240)**



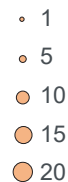
\*Zip codes that were 20% or more rural were classified as rural. Those less than 20% were classified as urban.

## Geographic location and reach of nonprofit survey respondents

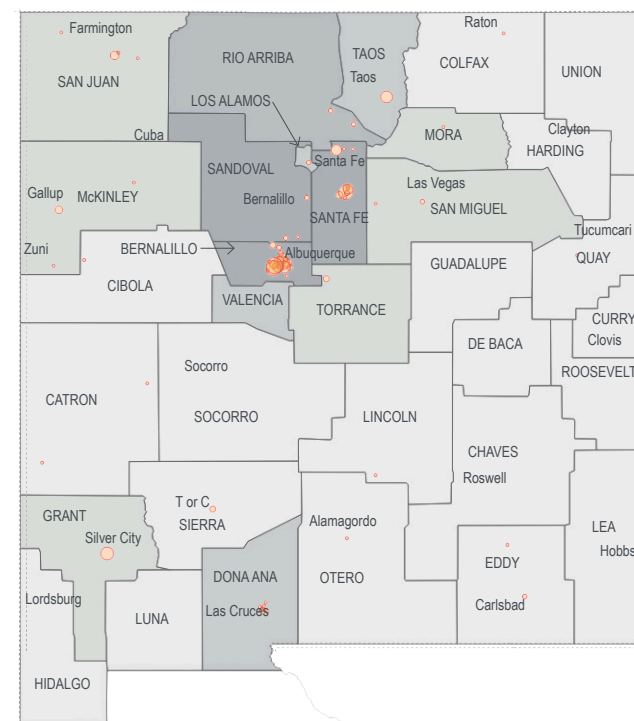
In both of these maps, each dot represents the primary location (zip code) of the nonprofit survey respondent's organization. The first map also shows the population density in the whole state. Most survey respondents were in higher density (darker) areas. The second map shows the reach of survey respondents. More respondents served the darker counties. Most served central and north central NM with a few serving northwest and southwest. If the respondent selected "statewide" service area, all counties were counted.



NPs location per zip code



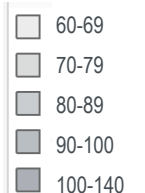
Population density



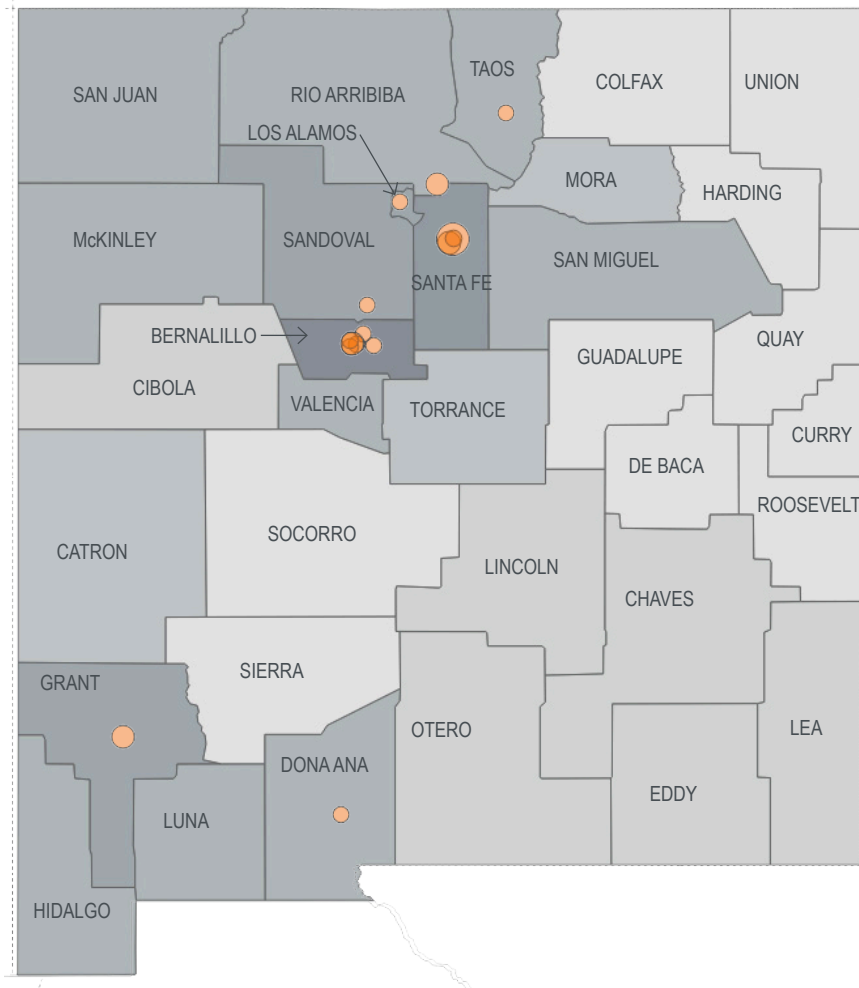
NPs location per zip code



NPs serving each county



## Geographic location and reach of funder survey respondents



Funder location per zip code



Funders serving each county



This map shows that funder survey respondents were primarily located in central NM and primarily served central and north central NM, northwest, and southwest NM.

## Rural/tribal and NP support organization interviewees

Rural/tribal nonprofit interviewees	NP support organization interviewees*
Amigos Bravos	Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC)
Community Outreach and Patient Empowerment (COPE)	Center for Frontier Communities/Nonprofit Resource Group (NRG)
DreamTree Project	Healthy Native Communities Partnership (HNCP)
Eve's fund for Native American Health Initiatives	Ian Esquibel (consultant)
Golden Willow	New Mexico First
Growing Our Dreams	New Ventures Consulting
Lone Tree Camps	Ngage
Mountain Home Health	NM Thrives
Nenahnezad Harvest Festival	New Mexico Association of Grantmakers
Ramah Navajo School Board	501(C)PA (formerly NonProfit Back Office Resources)
Rocky Mountain Youth Corps	Notah Begay III (NB3) Foundation
San Felipe Pueblo Health and Wellness Department	Paso del Norte Health Foundation
Tamaya Wellness Center	Santa Fe Community Foundation
Tewa Women United	SHARE New Mexico
The Volunteer Center/The Commons	SINC
Zuni Youth Enrichment Project	The Grants Collective
	UNM Evaluation Lab
	UNM Tribal Data Champion Initiative

\*An informal interview was also conducted with the Center for Nonprofit Excellence (CNPE) to supplement a separate study of CNPE that occurred simultaneously with this study. Readers are referred to that report for more information about CNPE. CNPE services and resources are also referred to throughout this report as relevant and a profile for CNPE is in Appendix A.

# Existing Parts of the System in New Mexico

Using the Nonprofit Support System Framework, this section describes what currently exists for each part of the system in New Mexico. Strengths, needs and/or gaps, and challenges are identified for each part of the Framework included in this study.

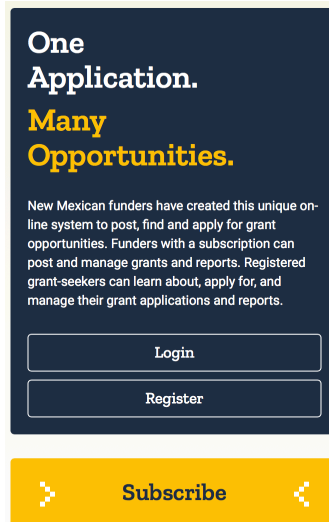


# Funding (For Nonprofits)

Funds and the funding process are important for NPs in general, and for the NP support system specifically. This section focuses on funding for NPs in general.

## Shared grant application system, many grant-writing support services

**SHARE NM**'s shared grant application system was mentioned numerous times by NP survey respondents. NPs want more funders to participate in the system.



At least six geographically dispersed support organizations help NPs build grant-writing skills and resources.

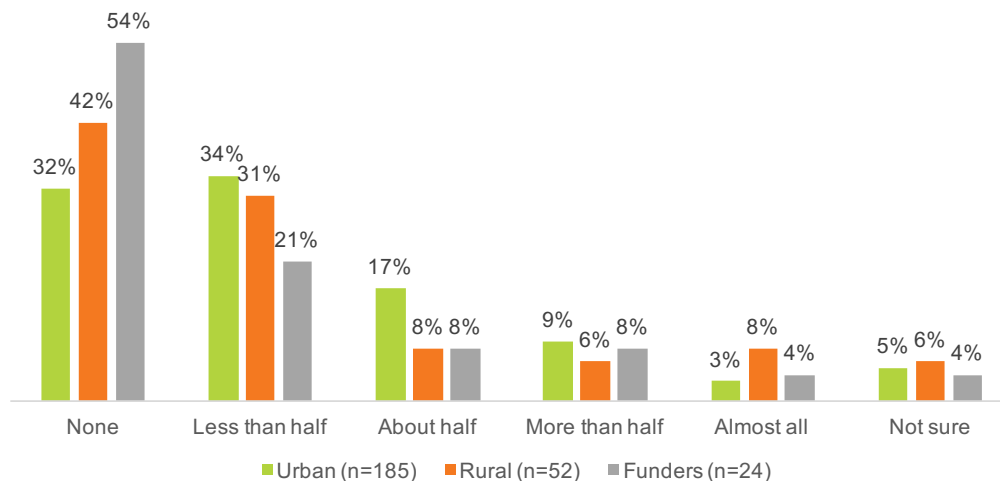
The **Grants Collective** has an intensive year-long Talent Academy for grant seekers, cooperative network to link NPs who are interested in the same funding opportunities, and a focus on bringing in more money from outside New Mexico into the state.

**Nonprofit Resource Group** does grant-writing training and technical assistance in southwest NM.

**NB3 and HNCP** provide grant-writing training and support to Native-led NPs and tribes.

## Multi-year funding and funding for operational costs

About how much of your annual grants/contributions or organizational budget is multi-year funding?



More than half of funders did not give any multi-year funding. For 2/3 of urban and 3/4 of rural nonprofits, multi-year funding was less than half or none of their budget. Additionally, 62% of small NPs did not receive any multi-year funding compared to 15% of large NPs (Appendix B).

**Rural** and **small** NPs were less likely to receive funding for general operating costs:

- 71% of urban vs. 60% of rural NPs
- 83% of large vs. 40% of small NPs

NPs said they need general operating funds for costs like:

- Facilities
- Administrative functions
- Staff time at decent salary
- Equipment
- Board retreats

*“If we could get more general operating, we could actually do MORE projects because we could do things like get trainings, and hire more staff, but with all our time tied up in project deliverables of grants, that is very hard to do.” (Nonprofit survey respondent)*

*“A willingness to provide multi-year funding so organizations can plan and grow without having to go through the same application effort each year for only one year of funding. This seems inefficient and a drain on the organization's senior management time and a constraint to long-term planning and more ambitious visioning without the multi-year financial security.” (Nonprofit survey respondent)*

## More collaborative relationships with funders

NPs requested:

- Funders spend more time in the communities they serve
- Funders do more site visits to understand the organizations they fund
- Opportunities to engage with funders outside of grant cycles
- Opportunities to plan projects collaboratively with funders
- Opportunities to collaboratively identify community priorities and potential solutions with funders and community members
- Being included at the table with funders
- Do not always focus on reaching large numbers at the expense of more in-depth programs/services or areas with low populations

*“Grant County Community Foundation hosted an event allowing the nonprofits to collaborate and funders were present with money to award for some of the best ideas. This helped us see one another as potential partners, not just competitors.”* (Nonprofit survey respondent)

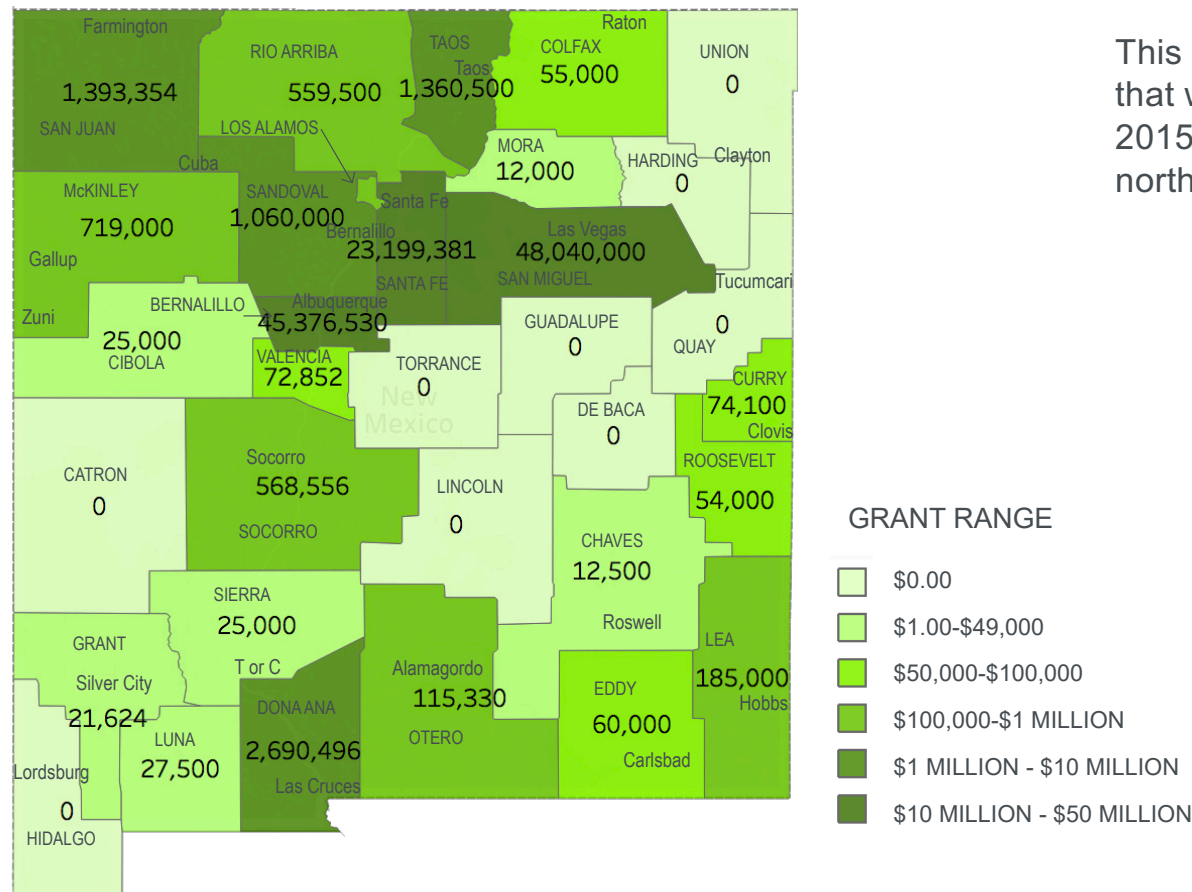
*“Move away from funder role to becoming joint collaborators that develop services with agencies. Target identified issues and rather than seek proposals seek agencies to develop solutions together, funders assist in assembling the investors in services.”* (Nonprofit survey respondent)

*“Nonprofits, funders, and community members need to come together to identify the most pressing issues and how to approach them; then TOGETHER determine where best to invest available funding. Nonprofits need funders to host nonprofit/funder dialogues which aren't about funding or positioning for funding, but discussing issues and strategizing together.”* (Nonprofit survey respondent)

*“An opportunity to work in cooperation to develop specific projects. Sometimes funders have better ideas than we do when it comes to expanding our activities into new areas.”* (Nonprofit survey respondent)

## Disparities in funding received across counties

### Grants made to New Mexico Counties\* (2015)



## Unrealistic grant application and reporting requirements that require substantial staff time

Nonprofits requested:

- Clarity about what is likely to be funded
- Grant applications and reports that appropriately reflect the funding amount in terms of steps and level of detail
- Honest and detailed feedback when they do not receive funding

The existing combined grant application through **SHARE NM** was mentioned many times as a good model.

The Flagstaff office of the Arizona Community Foundation takes their combined grant application process one step further: funders gather after reviewing applications to make collaborative funding decisions. Unfunded portions of requests are posted for outside funders or donors to consider.

*“And don’t make orgs jump through a ton of hoops to get/keep funding, particularly when it comes to reporting. Right now we have city, state, federal, and private funding and they all require different, sometimes complex reporting. In my dream world this would all be streamlined way more.”* (Nonprofit survey respondent)

*“Easier applications. Some ask a ridiculous number of questions that are not entirely relevant to the proposal. Some need more specific criteria. Well written RFPs are like gold.”* (Nonprofit survey respondent)

*“Clearer indicators of what will be supported. Clearer understanding of why a NFP, if proposing a viable solution, is not successful in getting a grant other than ‘we ran out of money’. What are the real factors in the decisions.”* (Nonprofit survey respondent)

# Nonprofit-level Services

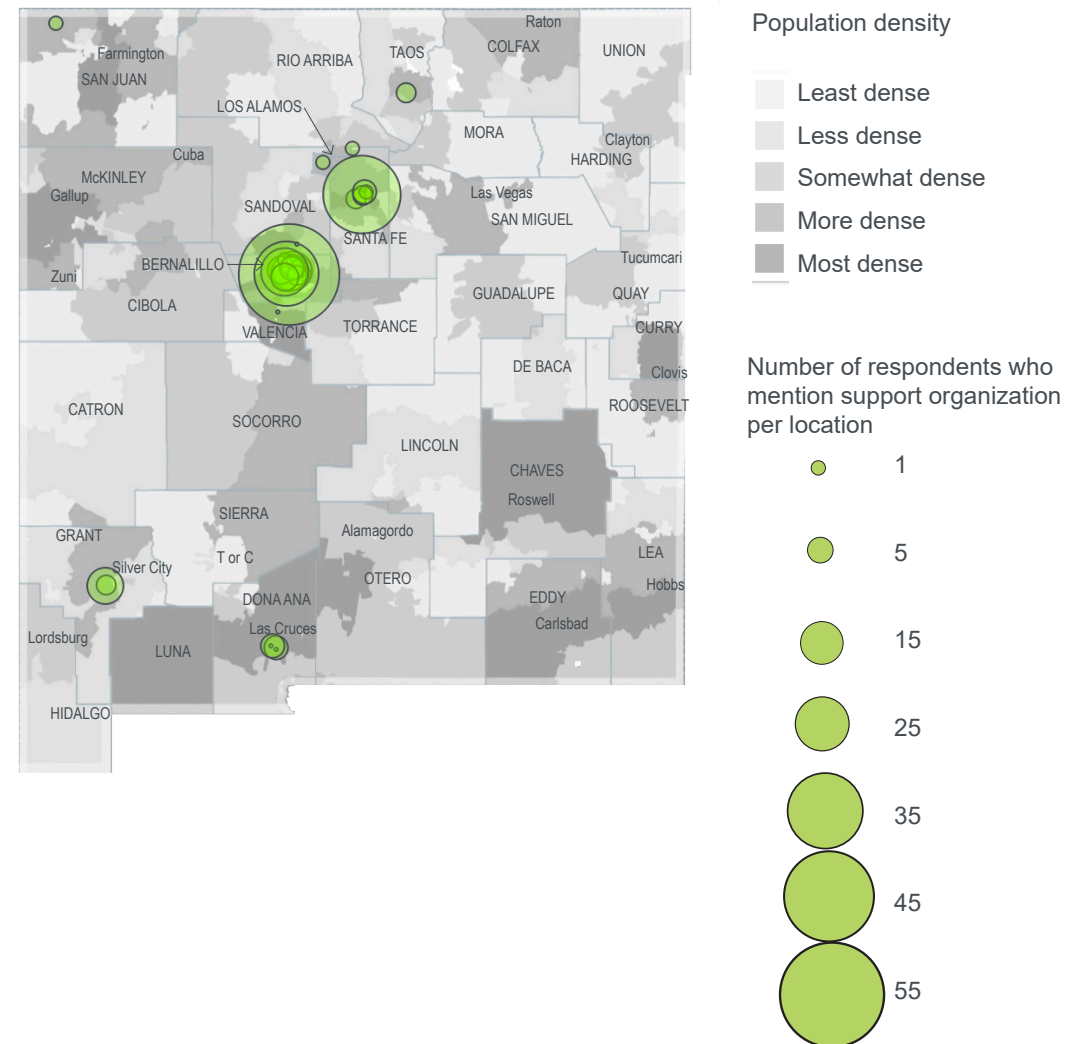
Existing nonprofit-level services in New Mexico are described in this section. Again, this category includes most services that are traditionally called training, technical assistance, and consultation.

## Many nonprofit support organizations and consultants in NM

NP survey respondents were asked to identify effective “training/technical assistance” providers. The following were identified more than once (in order of frequency):

- Center for Nonprofit Excellence (CNPE)
- Santa Fe Community Foundation (SFCF)
- The Grants Collective
- WK Kellogg Foundation
- Association of Fundraising Professionals
- Board Source
- United Way
- Nonprofit Resource Group
- Jean Block Consulting
- SINC
- UNM Evaluation Lab
- UNM
- Center for Civic Policy
- ProgressNow NM
- NM Primary Care Association
- Chamber of Commerce
- The Grant Plant
- Las Cruces Green Chamber
- New Mexico Children, Youth, and Families Department
- Rio Grande Community Development Corporation
- Tech Soup
- Ngage NM
- Center for Development and Disability (UNM)
- Everette Hill (consultant)
- Project ECHO (UNM)
- SCORE

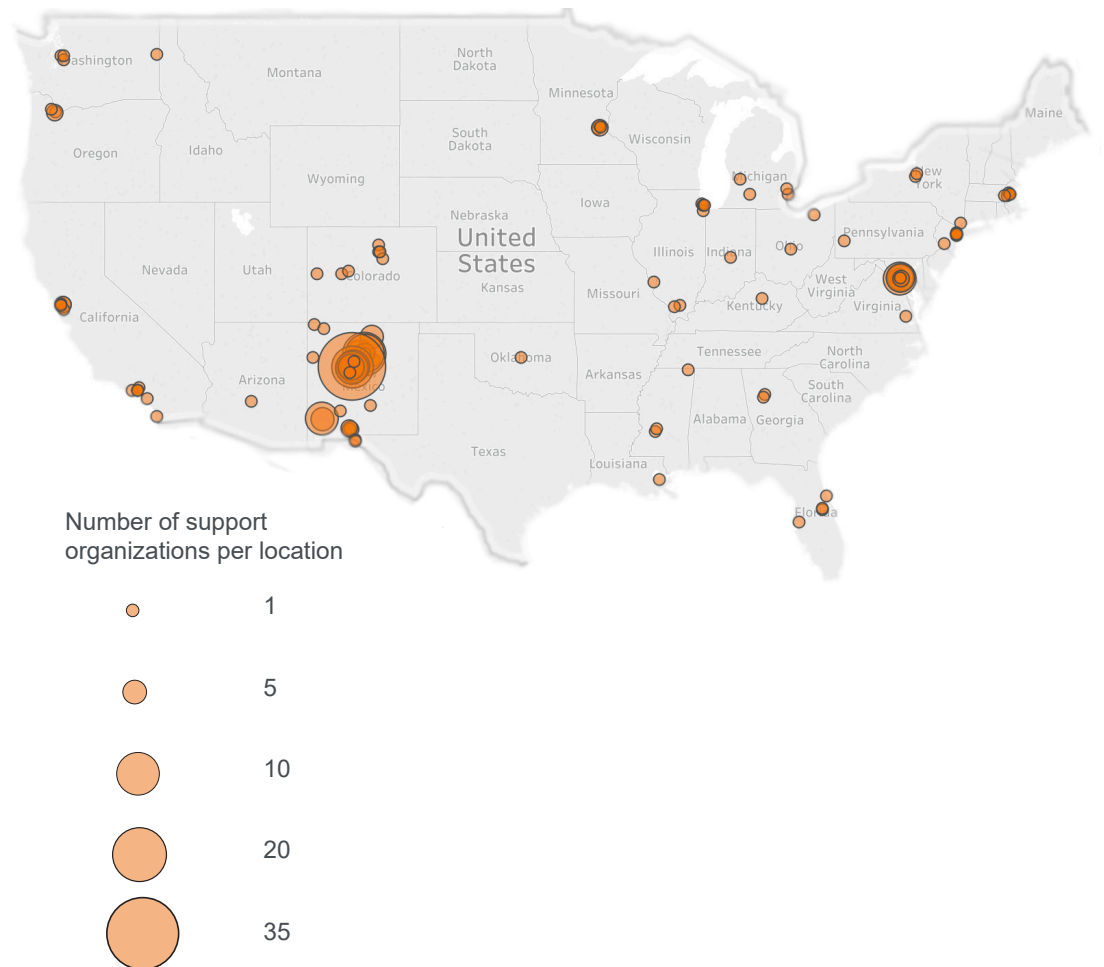
Locations of training/technical assistance NP Support Organizations identified by survey respondents





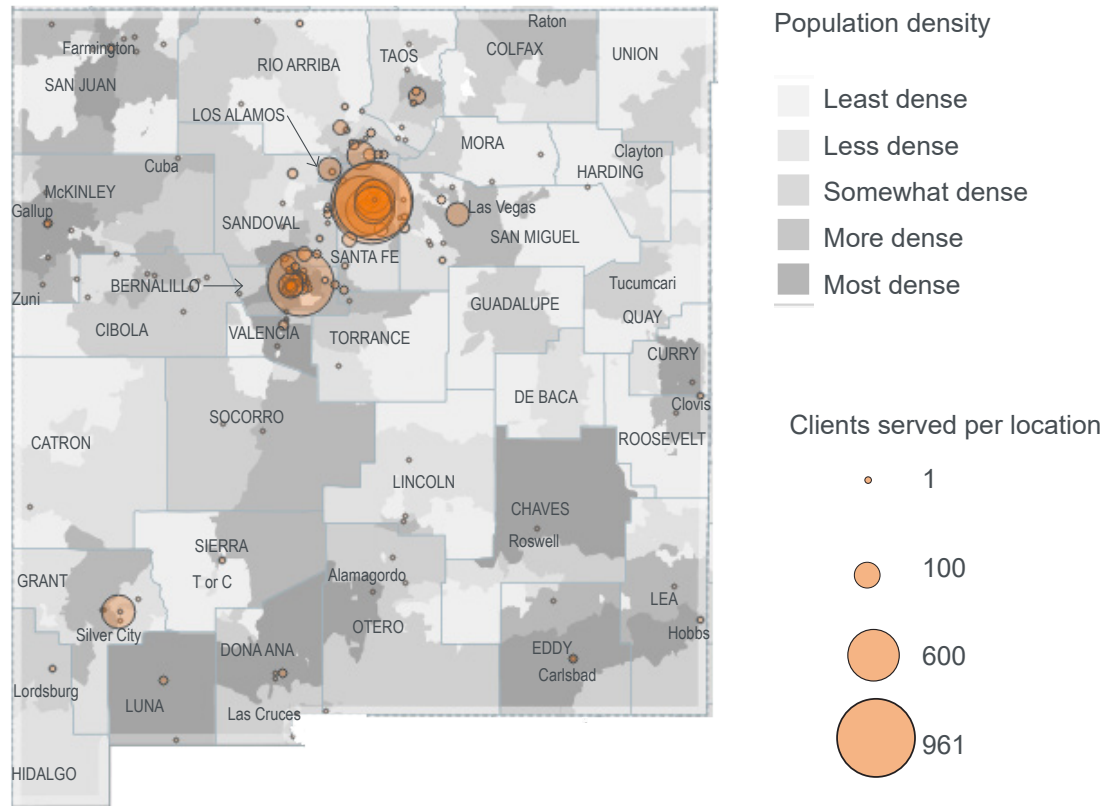
## Connections to national NP support organizations

This map shows the locations of national support organizations identified by NP survey respondents. The research team identified addresses based on web searches and did not verify the results with the survey respondent. Therefore, this map should be interpreted as a general sense of the national connections that New Mexico NPs have with support organizations.



## Services in central, north and south central, and southwest NM

Locations of clients served by NP Support Organizations interviewed for this study



As part of the NP Support Organization interviews for this study, organizations were asked for a list of locations for clients or participants in the past several years. Most organizations provided a list. These locations were mapped to better understand the current statewide reach of nonprofit-level services.

Based on this map, recipients of services provided by these support organizations were mainly in the central, north and south central, and southwest regions of the state.

This map does not include data from AASTEC or Ngage.

**Nonprofit Resource Group (NRG)**, which is part of the **National Center for Frontier Communities**, specifically serves **rural** NPs and offers skill-building training and technical assistance on grant writing, strategic planning, starting a nonprofit, board development, etc. They also support community coalition development including a coalition capacity assessment tool they developed. They have organized regional NP conferences and peer learning sessions. About 80% of their clients are in SW NM; the other 20% are across the state.

# Innovative grant-writing, leadership and board development, and evaluation services

NP support organizations who were interviewed provided primarily:

- Fundraising/grant development
- Leadership development
- Board development
- Evaluation

### Leadership development

- Santa Fe Community Foundation's Executive Leadership Circles and **Leadership Development for Women of Color** in nonprofits are both cohort programs.
- Paso del Norte Health Foundation's **REALIZE** program is year-long cohort and has included a few individuals from southern New Mexico.
- Ngage recently piloted a new **Emerging Leaders** cohort program for southern NM.

### Board development

- Santa Fe Community Foundation uses trained SCORE volunteers who are retired from the NP sector to do board development work.
- Outside resources such as Board Source, ASU Lodestar Center.

### Grant writing

- The Grants Collective (GC) was created as a NP to help NPs learn better grant-writing skills rather than writing grants for them. They focus on helping NM NPs identify and be competitive for national funding opportunities. The Talent Academy provides an intensive 4-month fellowship for grant writers. GC also provides free "curbside" consulting twice a month.
- SINC provides intensive grant-writing and other 1-on-1 services for NP start-ups.

### Evaluation

- **UNM Evaluation Lab** helps nonprofits expand their evaluation skills and tools through mentored graduate students. They are using interactive distance learning model and technology to engage NPs across the state.
- **Tribal Data Champions** initiative at UNM just completed a pilot year-long cohort with seven participants from different tribal communities. Included webinars and quarterly in-person meetings to co-create indigenous evaluation journey together.

## Native-led support organizations for Native-led NPs and communities

- The Notah Begay III (**NB3**) Foundation is a Native organization that primarily serves tribes and Native-led NPs. They are national organization but work a lot in NM. One of their main priorities is creating forums for tribes and Native-led NPs to network with each other. They also collect, share, and provide access to data and research mostly related to health. They use an indigenous evaluation framework and digital storytelling. They just received a new grant to do leadership development for Executive Directors.
- **Healthy Native Communities Partnership (HNCP)** is a Native-led organization serving tribes and other Native-led NPs. They developed a process for community members to come together and share with each other their own definitions and strategies of wellness from a holistic perspective. Based on the same beliefs and values, they provide tailored strategic planning, collaboration, facilitation, and grant-writing services.
- The **Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC)** works to improve access to and quality of health data for tribes, including social determinants of health such as economic development. They help tribes and programs develop databases and technology to collect and use appropriate data for Native communities. They serve 27 tribes in the southwest US including all tribes in NM. Their Executive Council includes a representative from each tribe.

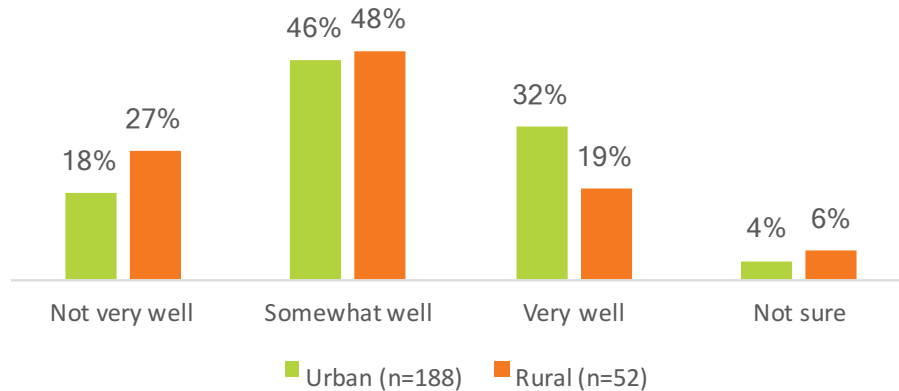


ALBUQUERQUE AREA SOUTHWEST  
TRIBAL EPIDEMIOLOGY CENTER

*“Lean into community partners’ unique skills in order to provide services back to them.” (NP Support Organization)*

## Unmet needs despite many available services

How well are your organization's training and technical assistance needs currently being met?



Fewer than one-third of NPs said their training/technical assistance needs are met “very well.” Needs of rural NPs were met less well than urban NPs. Unmet needs of small NPs matched those of rural NPs (Appendix B).

The survey did not include explicit ranking of training needs, but the **most common training/ta needs** mentioned in open-ended comments were:

- Board development
- Staff development
- Organizational development
- Financial management

The **CNPE survey** conducted in parallel with this study asked respondents to rank their training needs. The most common were:

- Fundraising
- Board development
- Communication & marketing

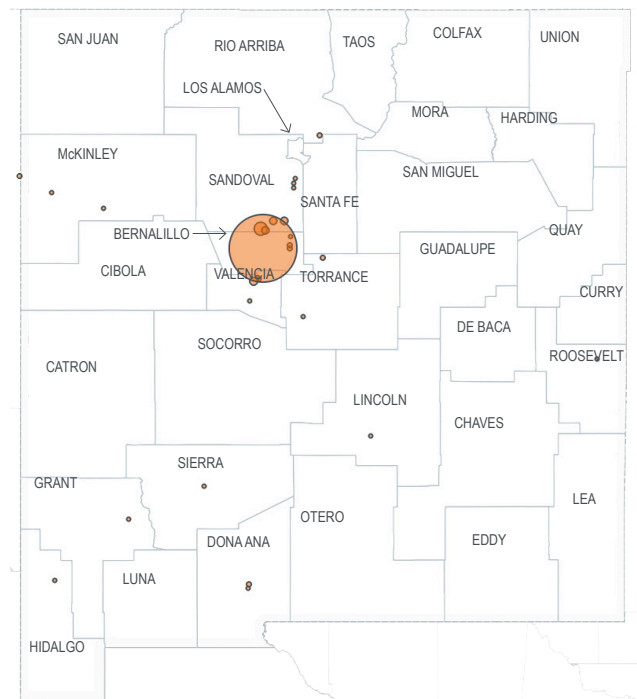
**Rural/tribal NP interviewees** identified all of the above needs, including communication/marketing.

**Board development** is one of the most frequently discussed needs. However, training and support are not the only challenges. There are often not enough potential board members in rural communities especially. Those who are available wear multiple hats in their communities. Younger board members may not be prepared to work as hard as the older generation has for decades.

## Northwest and southeast corners of the state

Few Support Organizations were mentioned in the northwest and southeast corners of the state, and as these maps show, the largest support organizations are not reaching those areas of the state. This gap could be because few NPs from these parts of the state participated in the survey. HNCP is located in the northwest corner but serves tribal communities across the state and country.

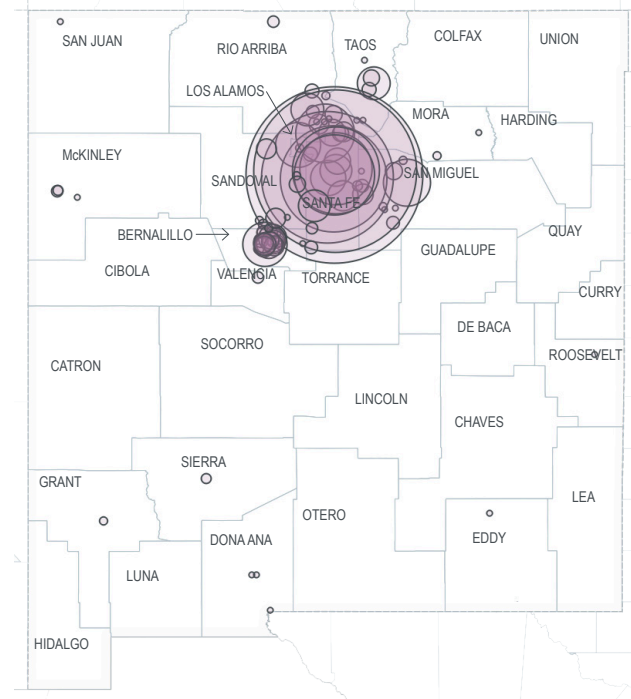
**CNPE Reach**



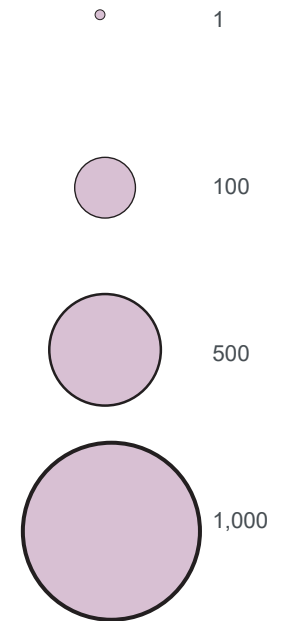
Clients per location



**SFCF Reach**



Clients per location



These maps show locations of individuals or organizations served by the support organization in the past several years. Data are not equivalent across organizations, therefore should only be used to make general conclusions.

## Strategic, individualized, and long-term support services

In surveys and interviews, some people cited limitations in current types and formats of nonprofit-level services:

- Surface-level trainings
- Trainers with limited expertise or out-of-date information
- Too much one-off, short term training and not enough longer support
- Scattered training topics
- Online training must be well-done – a recorded PowerPoint is not effective
- Need more individualized technical assistance and consultation

*“A body or set of individuals who can train for specific [nonprofit] personnel and personnel tasks, an actual model of a bootcamp for board members with role playing, not just another slideshow and PowerPoint, but something that puts board members in a situation where they actual understand what they need to do.”*  
(Rural/tribal NP interviewee)

*“Sometimes having technical assistance as one-off opportunities, this may be helpful for certain situations, but having long term access to technical assistance providers that can get to know your organization better is helpful.”* (Rural/tribal NP interviewee)



## Addressing issues of racism, diversity, and inequities

A few NP survey respondents discussed the following issues in open-ended responses:

- Most trainings do not reflect or include lived experiences of people of color.
- There is a lack of diversity among staff at many NPs and funders.
- The underlying causes for many community's challenges are racism and discrimination at multiple levels.
- Racism underlies inequities in funding systems.

*"We really have a gap in NM of women of color who can do communications work and run canvasses as well and are always looking for these folks who align with our org and come with lived experiences in their expertise." (NP survey respondent)*

*"Leadership development focused on people of color is critical for [our organization]. We need to be able to operate nationally and in funder circles, we need to arm ourselves with a little better skill set so that we can operate on the same level, or challenge on the same level." (NP support organization interviewee)*

*"The needs of the community most of the time does not reflect data and numbers. Is about racism, discrimination, race, color, barriers. The social determinants not only of health but systems." (NP survey respondent)*

*"Become more aware of racial injustices throughout the sector by taking undoing racism training; take that much needed journey towards a more equitable future internally as organizations and externally throughout the community." (NP survey respondent)*



## Logistical and operational supports for NPs

Although not asked directly in the survey, NPs identified logistical and operational support services as needs in open-ended survey questions and interviews, including:

- Accounting & financial management
- Human resources
- Information technology
- Legal services

Most **rural/tribal NPs** who were interviewed discussed these types of needs.

Many **NP Support Organizations** also discussed needing these types of services in interviews. Many Support Organizations are relatively small NPs themselves, and therefore struggle with similar logistical issues to any small NP.

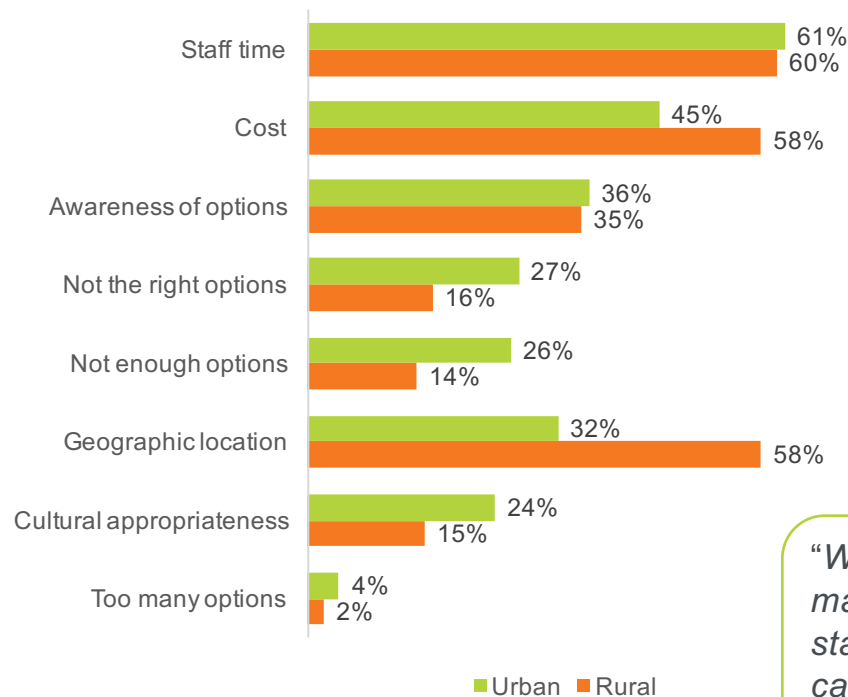
**Fiscal sponsorship** was not identified as an unmet need or gap, but many different types of support organizations provide this service and it seems well-used. NPs basically receive accounting and financial management services from the fiscal intermediary.

**501(C)PA** (formerly Nonprofit BackOffice Resources) is a nonprofit in Albuquerque that provides accounting and payroll software and services, HR consulting, and assistance with grant reporting to NPs in New Mexico. They also do financial presentations and training for boards and leadership. They currently serve about 30 NPs and want to go statewide.

**Colorado Nonprofit Association** has served more than 300 NPs through the Pro Bono Legal Group that links NPs with volunteer lawyers based on their unique needs. Common services are HR, contracts, regulations, and governance.

## Staff time and cost for all NPs, location and technology for rural NPs

### "Big challenges" to accessing training/technical assistance



"Staff time" includes time to attend training AND to use what was learned after the training – both are extremely limited.

#### Rural/tribal nonprofits:

- Cost and location are larger barriers for rural nonprofits than more urban ones. Includes staff time to travel as well as travel costs.
- Do not know where or what to look for.
- Limitations to technology infrastructure in rural communities.
- Finding people in their community who fit budget and understand their community.

*"We did a tech assessment recently, and realized that no matter the good equipment we buy, our internet is going to stay at slow speed until county updates infrastructure. We can't do Zoom or remote access because of internet speed. Phones go out when it rains."* (Rural/tribal NP interviewee)

*"When we look locally, the cost is prohibitive for legal services and communications support, for board development it would be great to know...we are looking for someone to be on our board that has a legal background and haven't been able to find that."* (Rural/tribal NP interviewee)

### Lack of access for rural areas or smaller NPs

As the map on page 24 shows, survey respondents identified very few NP support organizations in rural parts of the state. Additionally, the map on page 30 shows the reach of the largest NP support organizations into rural areas is relatively limited.

Rural and small NPs were also less likely to report their training/technical assistance needs were met very well compared to urban and larger NPs. They also had less information about whether the right services were being offered, possibly because they are not aware of what is available. However, few supports appear to be available in their areas currently.

As illustrated by the quote below, the bar is higher for rural NPs to attend training in central NM because of additional financial and staff costs. Additionally, many NPs in rural areas are also smaller NPs which means they are less likely to be interested in or qualify for services such as The Grants Collective, SINC, or intensive leadership development offerings.

*“As a rural agency it is a big cost to go to something that is even in Santa Fe, we have to be smart with how we choose...It has to have elements that work for adult learning and training (not a recorded PowerPoint). Also, things that are more modular, so that it's easier to access on regular basis. Offer technical assistance that is very targeted, clear topic, clear who target audience is, so NPs can make right choices about who to send to what.” (Rural/tribal NP interviewee)*

## Different NP context in tribal communities

Every tribe, tribal organization, and NP in tribal communities has different experiences. Some of these experiences were shared in telephone interviews with rural/tribal NPs. Quotes are shared rather than themes. This information is intended to support additional conversations rather than be conclusive.

*“Sometimes funding (public sector funds for tribal orgs or activities) - if you look at landscape of foundations and philanthropy, the amount of funding available to Native communities it is disproportionately low. Working in an underserved area (Navajo Nation) there are additional challenges of being able to access resources and recruit staff that may have experience in the NP sector.”* (Rural/tribal NP interviewee)

*“Tribal context should be their own focus... There are huge challenges and a whole other level of technical assistance for how tribal government and nonprofits can work together.”*  
(Rural/tribal NP interviewee)

*“Those that have tribal and grant funding, those two areas of what we are trying to do don't always overlap. We are trying to meet 2 sets of goals sometimes. Every year for our tribe we have a new governor, so whatever that governor needs and wants, we have to do that.”* (Rural/tribal NP interviewee)

*“In some ways, [being in a tribal community] gives us access to some resources that other people don't have, but the reason that exists is because of the inequities and trying to get a balance in light of the history of stress, racism and inequities and the current state of those... on the flip side, there is a lot of interest in wanting to gain access to [the Pueblo] with their programs. I have to be a gatekeeper to know if these things fit this community and if it could be scaled to meet the population size.”* (Rural/tribal NP interviewee)

# Sector-level Services

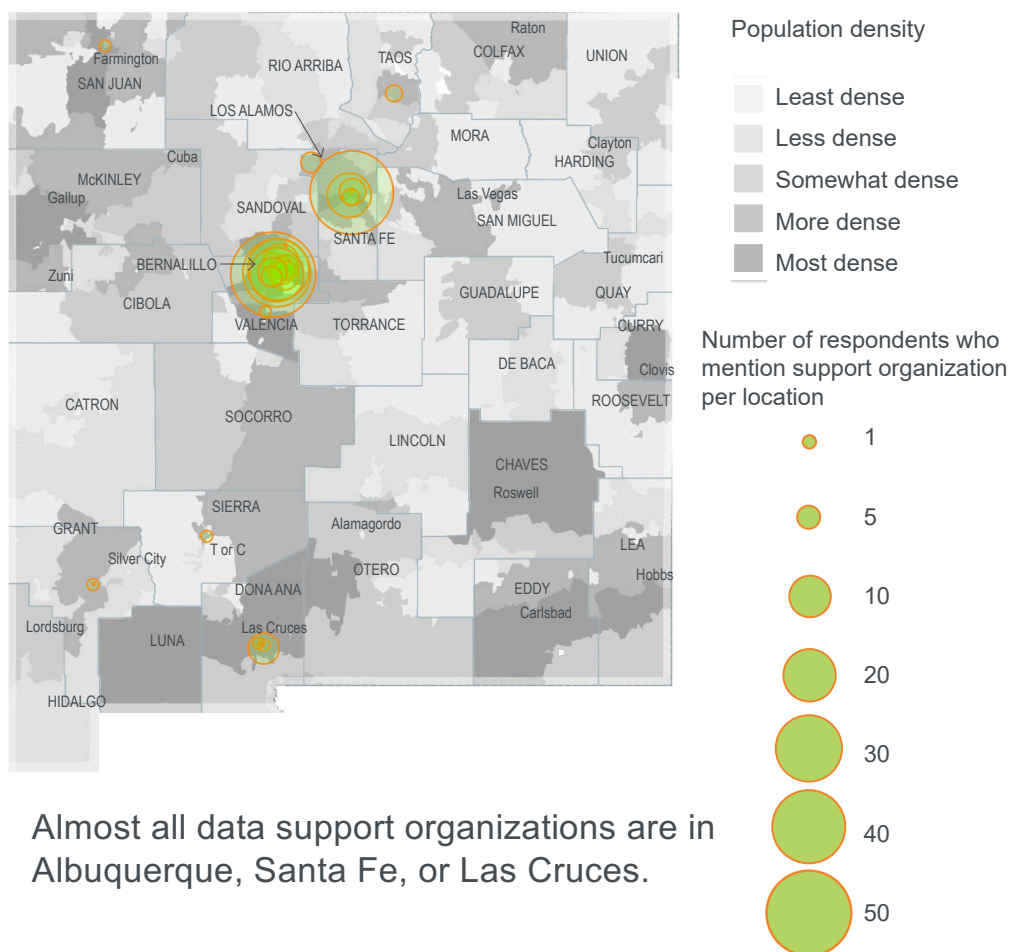
Existing sector-level services in New Mexico are described in this section. This includes Data & Research, Advocacy, and Networking & Collaboration.

# Data & Research

This component was intended to include research about the sector itself (for example, salary or economic impact studies), research about best practices, or community data. Some respondents also talked about program evaluation.

## Many data resources in and outside of New Mexico

Locations of data/research NP Support Organizations identified by survey respondents



The most frequently mentioned data organizations in New Mexico were:

- NM Department of Health
- NM Voices for Children/Kids Count
- Annie E. Casey Foundation
- Center for Nonprofit Excellence
- NM Community Data Collaborative
- UNM
- Santa Fe Community Foundation
- SHARE NM

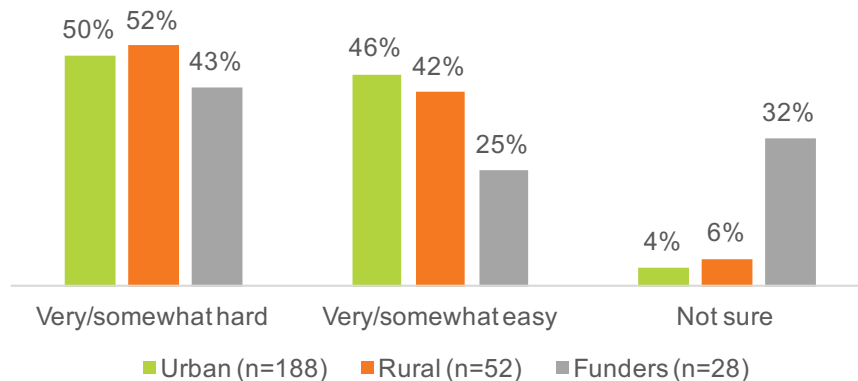
Other identified data organizations that were less-frequently mentioned by respondents were:

- Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC)
- NMSU Center for Community Analysis
- NM Association of Grantmakers

NM Association of Grantmakers facilitates **sector-level data and research** such as New Mexico reports on philanthropic giving trends and issues. An interactive dashboard on their website shows giving data by county, population, and type of support.

## Training and support for NPs to find or collect, use, and share data about their communities, focus populations, and services

**How easy or hard is it for your organization to get the data and research you need?**



About half of all NPs said it was somewhat or very hard to get the data and research they need. Funders were more likely to say they weren't sure how easy/hard it was to get data.

*"We have a major gap in NM for people who are excellent data analysts and most nonprofits don't use data. We also have a lot of duplication of the type of research that is collected while major gaps exist for research in some areas." (NP survey respondent)*

Participants requested:

- More local data
- More data about specific populations or issues such as Native communities, LGBTQ, undocumented immigrants, impact of the arts on rural economy
- Data from public agencies be readily accessible without having to make numerous requests
- Consistent set of data elements for applications and reporting across funders
- More opportunities for NPs to share data with each other
- Support and instruction on data sharing agreements and security practices
- Support for collecting data on own services and performance
- More research on issues that matter to communities with them as partners

*"...it's just information that is 'out there' and do what you want with it. Again, an 'agency' or vehicle of some sort, is needed to identify what can be done with the data-- how can it be acted upon." (Funder survey respondent)*



## Lack of easy and free access to wide range of existing data

Nonprofits identified the following challenges to getting the data they need:

- It is not always free
- Data are often aggregated too much to be useful
- Public agencies do not make data available easily
- Lack of understanding of data/research

Nonprofits suggested many possible solutions to improve access to relevant and quality data:

- Maintain curated list of free available data and research to centralized website such as SHARE NM or CNPE
- Leverage existing resources such as universities or NM First to do more data collection and research
- Make a data directory
- Leverage influencers to require state agencies to make data readily and freely available to NP sector

*“Find ways for UNM and NMSU to help with data and research AND have them work with community-based non-profits.” (NP Survey respondent)*

*“Create a space for data and reports of data analysis to be shared across the nonprofit community.” (NP survey respondent)*

# Advocacy

This component was intended to refer to sector-level advocacy as opposed to issue-specific advocacy. Many respondents did mention the latter in their responses. However, there was overwhelming support for needing “one voice” for New Mexico’s nonprofit sector.

## Several organizations are doing some sector-level advocacy

The most frequently mentioned sector-level advocacy organizations in New Mexico were:

- United Way (CNM, NNM)
- Center for Nonprofit Excellence
- Santa Fe Community Foundation
- NM Thrives
- NM Voices for Children
- Con Alma Foundation
- NM Center for Law and Poverty
- McCune Charitable Foundation
- NM Association of Grantmakers
- NM First

Survey respondents also identified a large number of organizations within and outside of New Mexico that do advocacy for specific topics or populations.

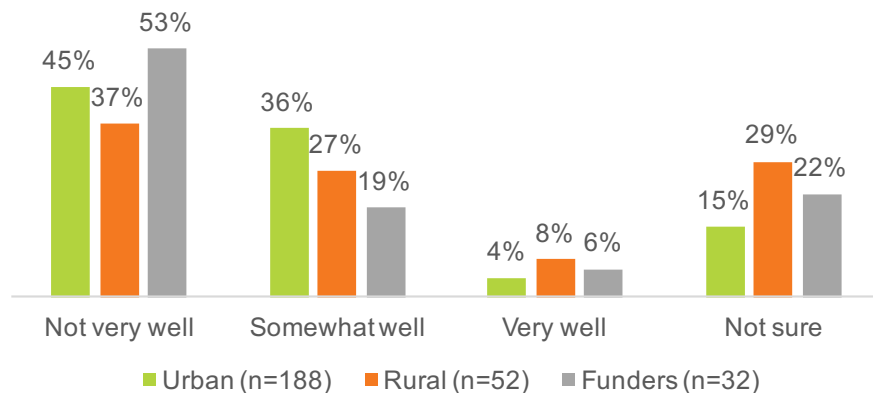
Although not interviewed, **Think NM** also does policy research and the **New Mexico Center on Law and Poverty** does policy research, education, and advocacy to improve living conditions, increase opportunities, and protect the rights of people living in poverty.

Based on NP Support Organization interviews:

- **NM Thrives** was formed two years ago primarily to advocate for the NP sector in New Mexico. The director follows issues at the state and federal level that are relevant to NPs and shares this information with NP member organizations. For example, she currently attends the Revenue Stabilization and Tax Policy legislative committee and conducted a survey of NPs about their financial outlook to help inform the committee about consequences of taxing NPs.
- **NM Association of Grantmakers** has research, policy, and evaluation as one strategic area. They have developed policy briefs on Education Policy to be useful to the NP sector. They convened a funder group last year to be prepared to counter a tax bill that could have come forth in the legislative session. They could do more work in the policy arena with a broad focus on the NP sector if they had more capacity.
- **NM First** conducts policy research, dialogue and deliberation. Every two years they do a convening prior to the legislative session on a topic selected by the Board. Two years ago they convened NPs to examine how to strengthen the support network.

## Not currently done well, or lack of knowledge about existing efforts

**How well is advocacy being done for the nonprofit sector as a whole in New Mexico?**



It is striking that almost one-third of rural NPs and one-fourth of funders did not know if advocacy is being done well for the sector. Also, almost one-third of small NPs said “not sure” (Appendix B).

Study participants identified the following needs around sector-level advocacy:

- Many said there needs to be one voice for the nonprofit sector.
- Some used advocacy to refer to NP issues other than legislative – for example advocating for more funding for the NP sector or for getting access to state-level data.
- A few said that more aligned advocacy efforts will follow from building better relationships and collaborations between NPs.
- A few said there is a need to educate the public more about role and impact of NPs.
- A few said entities outside of NP sector should also be engaged in advocacy work.
- A few said that communities need to be engaged in advocacy work to build their power.

*“As a nonprofit in rural NM, I do not really know how nonprofits are advocated for around the state. I know that through our United Way, we work to educate businesses and potential donors about how nonprofits operate, why we exist as nonprofits and the benefit to the community.” (NP survey respondent)*

*“We are each focused on advocacy for our specific issues and missions. I don’t see a great deal of advocacy for the sector as a whole.” (NP survey respondent)*

## Common agenda, training, and funding

Survey respondents identified the following challenges to NP sector advocacy:

- Develop an advocacy agenda because not everyone has the same things in mind. Some people do not know what advocacy includes or looks like.
- Lack of training and technical assistance about how to advocate. Many NPs do not understand what they can/cannot do. Some use ineffective strategies.
- Lack of funding for advocacy work, especially sector-level.

**Nonprofit Resource Group** does advocacy training in Silver City. Other entities do issue-specific advocacy training that could be adapted for sector-level advocacy.

*“An academy that could provide intensive training to staff members and program participants about nonprofit sector advocacy. Grantee orgs could send teams to build civic engagement capacity with specialized support.”* (NP Survey respondent)

*“We need a nonprofit chamber that is funded and governed by those of us in the sector. This body should be doing business level advocacy for the sector. To protect and expand tax privileges and alleviate burdens placed on the sector that don't benefit those we serve.”* (NP survey respondent)

*“Gather all advocacy organizations together and train them on how to do effective advocacy, not just websites and newsletters.”* (NP survey respondent)

*“Tell us how we can do it! I think people are unclear on what advocacy is.”* (NP survey respondent)

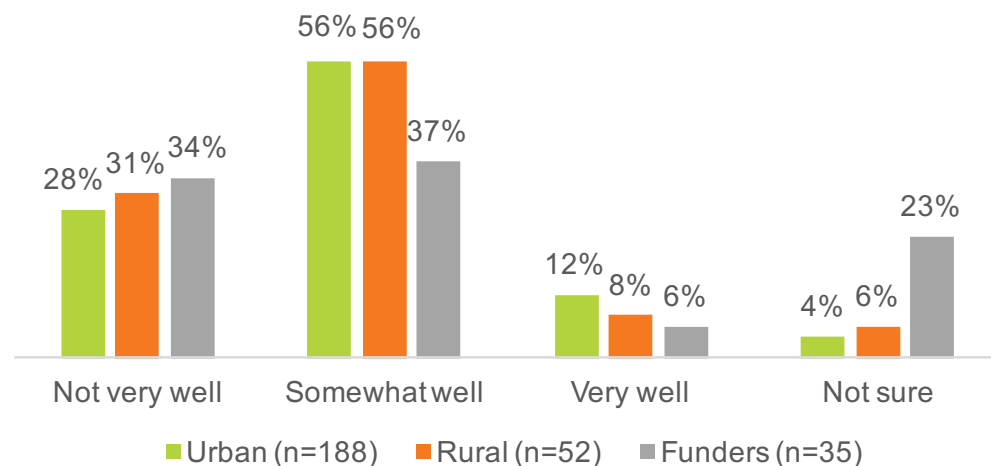
*“Need a common issue to rally around, i.e. need for funding.”* (NP survey respondent)

# Networking & Collaboration

The original framework only included networking, but based on themes from surveys and interviews we expanded this section to include collaboration as related to but distinct from networking. It may or may not be the most appropriate place in the Nonprofit Support System Framework for the critically important work of collaboration, but it is at least explicitly represented for now.

## Networking opportunities and some funding for collaborative projects

**How well do nonprofits connect with each other to share strategies and issues related to nonprofit organizations in general?**



About two-thirds of NPs said that NPs connect with each other somewhat or very well, with no large differences between rural/urban or small/large NPs.

Networking support organizations identified by NPs:

- Santa Fe Community Foundation
- NM Alliance of Health Councils
- Association of Fundraising Professionals
- United Way (CNM, NNM)
- Center for Nonprofit Excellence
- NM C3 Table (Civic Engagement)
- The Grants Collective
- La Red del Rio Abajo
- NM Coalition to End Homelessness
- Impact and Coffee
- SHARE NM

Some funders are explicitly supporting collaborative grants, including these mentioned by study respondents:

- Collaborative Zone Grants
- NM Funders Collaborative
- Community Foundation of Southern NM

## Even more networking opportunities especially outside of central NM

Many NP survey respondents expressed a strong desire to have more opportunities to meet more often and better understand what other NPs do. The strongest theme was that this **needs to happen outside of Albuquerque and Santa Fe**. People suggested:

- Monthly networking events at breakfast, lunch, or even afterhours
- Showcase 1-2 organizations at each gathering
- Quarterly regional gatherings
- Open houses or site visits hosted by different organizations each time
- Opportunities for NP leaders to connect with other leaders regularly

*“For nonprofits to come together to learn from each other, build relationships and strategize together, regional meetings would be useful. Because of the time and expense involved in organizing these events, funders could partner with nonprofits, providing financial support, and attending as equals.” (NP survey respondent)*

Many NP survey respondents said there is a need for comprehensive and up-to-date directories of organizations and services they provide, preferably organized by region. There was little mention of the CNPE nonprofit directory so it is not clear if people are not aware of it or if it does not meet their needs.

A few people suggested better leveraging social media tools to facilitate networking. Listservs of NPs in each region or by content areas were suggested.

*“Start with face-to-face convenings, perhaps organized around common/related missions. Follow Open Space or Strategic Doing facilitation methods to allow self-organizing groups to explore and better utilize their existing talents and resources to better serve clients.” (NP survey respondent)*

*“More community meetings just so [nonprofit organizations] can get to know each other. Also, events which promote collaborative grant opportunity and relationships.” (NP survey respondent)*



## More intentionality and support to facilitate true collaboration

Many participants said true collaboration requires intentionality, time, and support, and is not easy. However, they also said it is absolutely essential for the sector to survive and improve. The need for collaboration can generally be described in terms of both effectiveness and logistical goals. Here were a few suggestions:

- Include community members and other sectors in addition to NPs who are working on different aspects of similar issues or populations.
- Provide training and support to help organizations identify common goals with each other.
- Select leaders and board members who explicitly value collaboration as opposed to their own agendas.

*“While it’s important for nonprofits to connect with each other, we need to stop having conversations in isolation. Nonprofits need to come together with funders, community members, elected officials, and business leaders.” (NP survey respondent)*

*“Facilitated gatherings of stakeholders/nonprofits from different topic areas. For example, for EC [early childhood], do a regional gathering of EC nonprofits, and include mental health and education nonprofits. Help them think together how to work more collaboratively.” (Funder survey respondent)*

*“I really believe that we need a change of attitude, first and foremost. Everyone is admittedly overworked and stressed. But we need to start re-imagining how to exist in community with one another. We see collaboration as absolutely crucial, both from a financial and an effectiveness standpoint. If there were a forum where nonprofits could meet regularly to tackle these issues, it might lead to greater awareness of who is out there, whether they are duplicating the efforts of someone else who is already doing something similar, and how the sum of several parts is greater than that of the individual parts if taken by themselves.” (NP survey respondent)*

## Time, money, and competition

The theme of **competition** between NPs for very limited resources was very strong, especially for rural and small NPs.

- Some respondents said funders can be (and have been) effective conveners to support networking and collaboration. Funders are in a position to see where there might be synergies.
- A few others said having funders involved can be intimidating for some NPs and may encourage the feeling of competition (e.g., zero sum game). They suggested United Ways or CNPE as conveners.

Some NP survey respondents noted a lack of funding available to support collaboration, saying that true collaboration often requires substantial staff time and other resources to do well.

*“We don’t have time to collaborate, and we make the mistake that we think this is networking. Collaborating is a lot harder, but when we do it we do better. How do you it and do it well and have it sustain itself and distinct from networking.”* (NP Support Organization interviewee)

Suggestions to address **time** barrier:

- Build more networking time into already existing meetings or events such as training.
- Clarify the purpose of specific networking opportunities (e.g., identifying collaboration opportunities or building relationships with funders) to help justify the time.

*“Hopefully as we network more we will learn about more grants. But the challenge is that everybody we are networking with needs money too.”* (Rural/tribal NP interviewee)

*“The move toward funding collaborations is encouraging, but collaborations are extremely expensive and the grant amounts available often aren’t enough to cover the cost of even planning a collaborative project.”* (Nonprofit survey respondent)

# Communication/Information Sharing

This component is about how NPs and other stakeholders in the sector can find and receive information about multiple parts of the NP Support System easily and consistently.

## One central place to get and receive information

NPs requested “one place” to go for many different services and resources:

- Training/technical assistance offerings
- Data and research
- Grant information
- Directories of support organizations

NPs also want more effective virtual ways to connect with each other and share ideas. They suggested:

- Facebook pages
- Listserv where NPs can post questions (referenced one by the Assoc of Nature Center Administrators that is effective)

SHARE NM's main function is to provide information in a centralized location about New Mexico's communities and what people are doing to make them better. It is not just for NPs, it is also for government and private sectors.

SHARE NM provides training and technical assistance for people to use and access their online tools such as the grant-making platform.

NP Support Organizations also requested more efficient ways to share/market their services to the NP sector. Several said they currently go through CNPE to get information out about programs or services being offered.

# System Models in Other States

A system is more than a collection of parts. It includes who does each part and relationships between the players. This section describes key elements of models researched in other states for supporting nonprofits statewide.

## Overview of models

State	Statewide NP Association	Other Statewide NP Support Organization(s)	Funder partner	Explicit rural/tribal strategies	Innovation(s)
Arizona	Alliance of Arizona Nonprofits	ASU Lodestar Center for Philanthropy and Nonprofit Innovation	Arizona Community Foundation (ACF)	ACF regional offices; AmeriCorps VISTA	University research center; online NP certificate and degree programs
Alaska	The Foraker Group	n/a	n/a	Extensive staff outreach & travel	Nonprofit Sustainability Model
Colorado	Colorado Nonprofit Association	Community Resource Center	n/a	Extensive staff outreach & travel, AmeriCorps VISTA	3-level Capacity Building Framework; Pro Bono Legal Services
Minnesota	Minnesota Council of Nonprofits	Many	n/a	Regional office locations across the state	Regional office model
Mississippi	Mississippi Center for Nonprofits	n/a	MS Association of Grantmakers	n/a	Merging statewide NP and grantmakers' associations; Innovation Lab
North Texas	n/a	CNM	n/a	n/a	Intensive outcomes-driven management system
Washington	Washington Nonprofits	501 Commons	Statewide Capacity Collaborative (SCC)	Travel to rural parts of the state; SCC "design teams"	Many shared services (including software solutions); consultant referral system; online capacity assessment tool

### Visionary leadership

The most innovative nonprofit support organizations in other states had visionary leaders who were clear and laser-focused about what they were trying to accomplish, why, and how. Examples include:

- **The Foraker Group (Alaska):** Based on its original charge to provide shared services to the nonprofit sector more than 20 years ago, Foraker established and continues to strive towards dual goals of supporting nonprofit sustainability and serving the entire state (rural, urban, Native, and non-Native communities). All aspects of their philosophy, structure, and services are designed to serve these two goals.
- **Mississippi:** The MS Association of Grantmakers and MS Center for Nonprofits are in the process of merging to create one comprehensive nonprofit support organization. The leaders of both organizations and a consultant are driving the vision to not just merge the organizations but to completely redesign how they support nonprofits by aligning and integrating funders and nonprofits as “two sides of the same coin.”
- **CNM (North Texas):** The current President and CEO came from the private sector to lead a struggling, traditional nonprofit support organization. A strategic planning process identified a top priority of making the nonprofit sector more data driven. CNM has since developed and pilot-tested a model and resources for NPs to collect and use data to continuously improve and show their achievements to funders.
- **501 Commons (Washington):** The Executive Director for more than 15 years has a relentless focus on developing more and more effective support services for nonprofits and a sustainable business model. This focus led to new strategic and technological solutions for the support system that are now sold to other support organizations and mergers with other support organizations along the way.

Even with visionary leadership, innovative systems and service models take years or decades to develop. Several leaders advised starting small but starting somewhere.

## Role of statewide NP association: traditional vs. expanded

The scope of the statewide NP association tended to vary depending on whether there was another statewide NP support organization. In states **with** another statewide NP support organization, the role of the NP association tended to be traditional. In those **without** another statewide organization, the role tended to be broader.

### Traditional role typically included:

- Advocacy/public policy
- Basic (or focused) training/education
- Networking
- Sector research
- Member discounts

### Expanded role typically included Traditional plus:

- Shared services (HR, payroll, accounting, financial, technology)
- More intensive training/education services
- Organization consulting services
- NP certificate or cohort training programs

	Pros	Cons
<b>Traditional role</b>	<ul style="list-style-type: none"> <li>▪ Can focus on what they do best</li> <li>▪ Usually do not have to manage fee-for-service or client relationship with NPs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Financially difficult to sustain services like advocacy, research, networking, and basic education without complementary fee-for-service business lines</li> <li>▪ Additional services are usually provided by another statewide organization which requires coordination and communication to avoid confusing NPs</li> </ul>
<b>Expanded role</b>	<ul style="list-style-type: none"> <li>▪ Usually includes a broader vision of how to best support NPs</li> <li>▪ Can change service model to be more innovative and effective when necessary</li> <li>▪ May be more financially sustainable due to diversified funding sources</li> </ul>	<ul style="list-style-type: none"> <li>▪ Larger and more complex organizational structure and staffing models</li> <li>▪ May need to decide if and how to increase capacity by using consultants</li> <li>▪ There may be more “competitors” in the market, creating the need to partner or merge</li> <li>▪ Could potentially alienate potential NP clients who do not agree with stances on advocacy issues</li> </ul>



## Multiple strategies to reach rural and tribal communities

Several statewide NP associations or other support organizations had an explicit focus on and intentional strategies for reaching and serving rural and tribal communities in their state. A few are described here.

State	Strategy
Alaska	Staff from The Foraker Group's urban, centralized office travel frequently (mostly by airplane) to all parts of the state and tribal communities to provide training, organizational development, and other services. They have always included tribes in their work in part because most tribes in Alaska are also 501(c)(3) organizations. Travel is included in the organizational budget and clients do not pay for staff time spent travelling. Staff and board also represent the geographic, cultural, racial/ethnic diversity of the state.
Colorado	The Community Resource Center (CRC) in Colorado has been committed to building relationships with rural and tribal communities since forming in 1981. Approximately half of their 10 staff spend about half of their time traveling across the state. For almost 30 years, they have also held Rural Philanthropy Days. They partner with each of 8 rural regions to plan and hold a 3-day conference every 4 years in each region. Each conference addresses local issues and explicitly includes up to 100 funders, including funder roundtables. The CRC also places and supports almost 30 AmeriCorps VISTAs in rural communities each year.
Minnesota	The Minnesota Council of Nonprofits (MCN) has 6 regional offices in addition to the central office in an urban metropolitan center. Offices were intentionally located to cover most of the state within 85 miles of one office. Relationships with tribes are being built one at a time over time. Each office has a physical location and a 50% FTE staff person who lives in and has a history of being active in the community. Each office also has an advisory committee that represents the whole area served by the office. MCN's board of directors is also required to include representation from each region.
Washington	Washington Nonprofits has incubated about 12 local nonprofit networks across the state. They provide some administrative support such as managing contact lists. Their entrée into rural communities is by listening tours and offering basic nonprofit training for which there is a high demand. The Washington group 501 Commons primarily serves rural areas by deploying trained volunteer consultants who are selected, vetted, and overseen by the organization. Consultants may live in the community being served or be willing to travel. Primarily consulting services are provided.

## Innovative ways to engage funders in the NP support system

Two innovative strategies for engaging funders in the NP support system were in Mississippi and Washington. Their strategies are described here. Arizona's statewide NP support organizations also partner closely with the Arizona Community Foundation which works statewide and has several regional offices.

	Mississippi	Washington
<b>Funder group</b>	MS Association of Grantmakers (MAG)	Washington Statewide Capacity Collaborative (SCC)
<b>Description of funder group</b>	MAG is Mississippi's statewide membership organization for grantmakers. They currently support networking opportunities, learning and sharing, collaboration, policy, and research/data collection.	Group of funders who came together to better address: 1) NP sector advocacy, 2) capacity building tools/services, and 3) sector leadership. Members contribute towards SCC operating costs and a pooled fund. Members align their individual funding to the NP support system. They distribute pooled funds to support collaborative projects.
<b>Relationship with other NP support orgs in the state</b>	MAG is in the process of merging with the statewide NP association to create a new organization. This is an intentional and strategic merger being planned for several years with grant support. This is the first known example of statewide funder and NP associations merging. The primary rationale for the merger include efficiency and transformation of how the NP sector is supported across the state. The new organization will be led by executive committees from each organization's current board.	SCC provides substantial funding to the two main statewide NP support organizations (Washington Nonprofits and 501 Commons) through both aligned and pooled funding. There is some communication across the three organizations, but not a lot of coordination or collaboration.

# Best practices in NP education/consultation approaches

### Content

Some states used specific frameworks for their education/consultation offerings, including:

- NP Practices & Policies Guidelines (many)
- Nonprofit Sustainability Model (Alaska)
- 3-level learning model including individual, organizational, and systems (Colorado Community Resource Center)

### Training levels

- Some states explicitly distinguished “Nonprofit 101” training from other types of training.
- In some states, Nonprofit 101 was provided by the state association or another support organization, with more advanced training provided by the other one.
- In some states, multiple organizations provided similar levels of training. They usually coordinated training dates but not necessarily who was providing what topics for which levels.
- Some organizations also provided individualized organizational consultation for a variety of topics, whereas others referred NPs to consultants or other organizations for these services.

### Trainers

There was substantial variety in who actually provided training or other support services based on the organization’s capacity and philosophy, including:

- Only their own staff to ensure consistent quality and philosophy
- Cadre of carefully selected consultants who were trained in the organization’s approach and signed non-compete agreements
- Cadre of consultants who design their own material and are reviewed regularly based on training evaluations
- Electronic directory of consultants who are screened and vetted to make referrals for more advanced organizational consultation in specific areas

### Format

A variety of formats are used, but the majority still involve delivering training in-person:

- Online/electronic toolkits for Nonprofit 101 topics to complement in-person training, intentionally based on adult learning principles (Washington Nonprofits)
- Staff travelling to rural areas to deliver Nonprofit 101 training (doubles as relationship-building opportunity)
- Using consultants to deliver training in more rural areas
- Peer cohort learning models

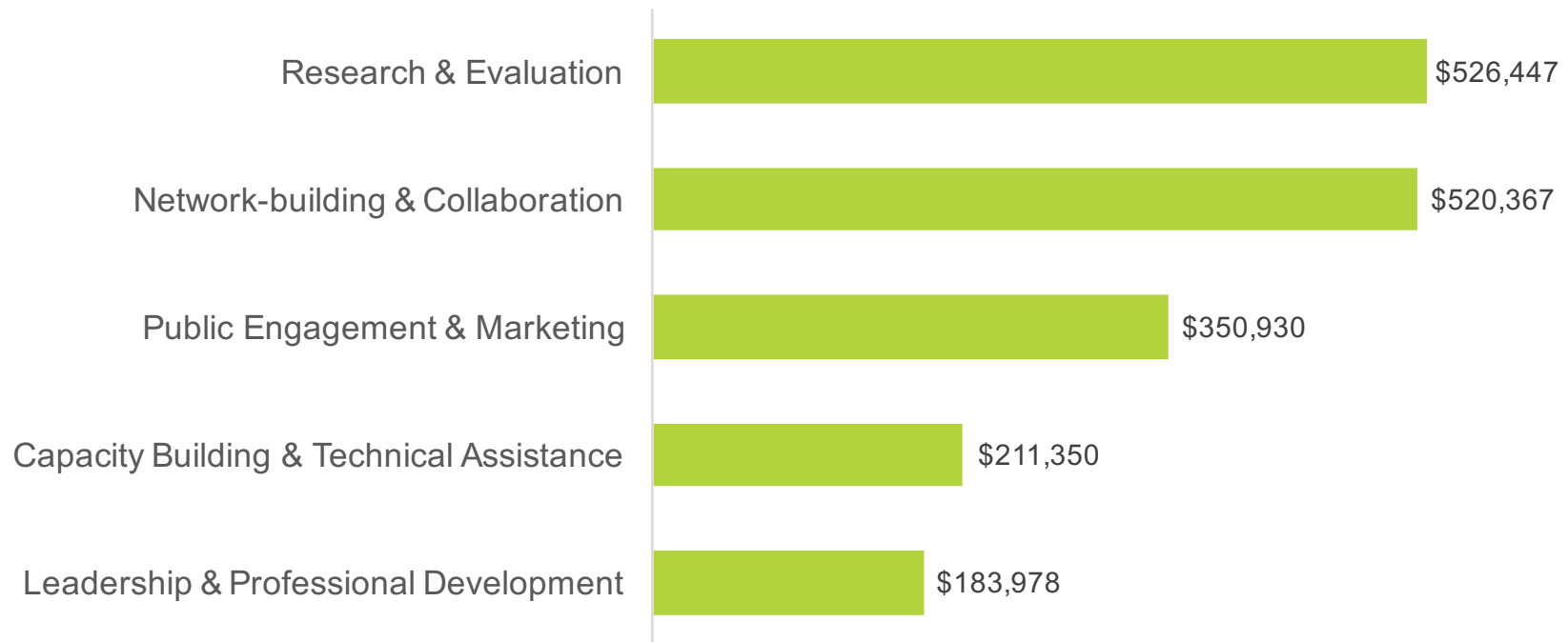
# Funding a Nonprofit Support System

While the primary purpose of this study was not to develop a business model, some data are provided in this section about current funding for the NP support system in New Mexico, potential for pooled funding, rough cost estimates, and funding models for different lines of business from the literature and organizations in other states.

## More than \$1 million invested in NP support system annually

New Mexico Foundations gave \$1.8 million to the nonprofit support strategies in this graph in 2016.\* Assuming about 2/3 of this amount went to New Mexico NPs (slightly more than half of all giving went to NM NPs and we assumed more support grants might stay in the state), this was **more than \$1 million dollars** for the nonprofit support system in New Mexico in one year.

### Giving by New Mexico Foundations (2016)



\*Foundation Center (2016) data available through partnership with New Mexico Association of Grantmakers. Data updated as of 11/21/18. Available at: [www.nmag.org](http://www.nmag.org).

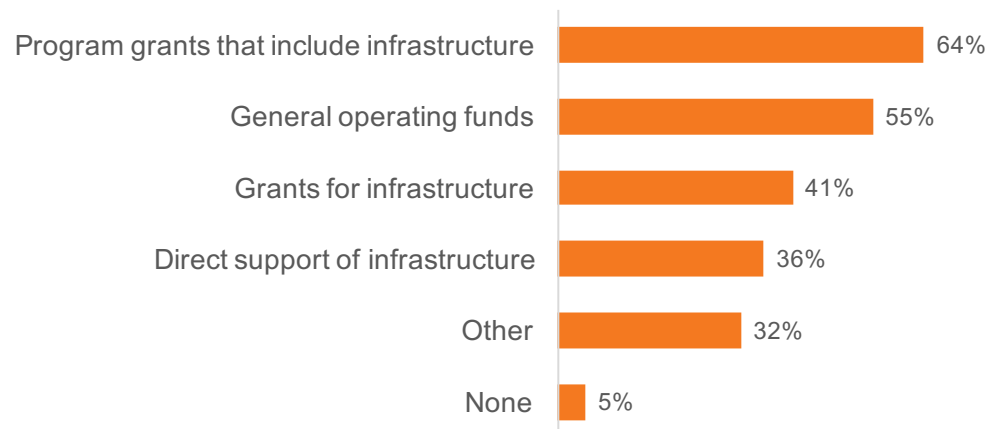
## Most funding is through program grants or general operating funds

The most common types of funding for the NP support system among funders who responded to the survey were networking/collaboration, training/technical assistance, and program grants that included general NP support activities. A small percentage of funders did not support any of these things.

**Types of Nonprofit Infrastructure Currently Support**  
(Percent of Funders, n=24)



**Type of Support Currently Provided**  
(Percent of Funders, n=22)



## New Mexico funders of the nonprofit support system

Funders mentioned by NP survey respondents as funding and/or providing nonprofit support services:

- Santa Fe Community Foundation
- United Way
- WK Kellogg Foundation
- Con Alma Foundation
- McCune Charitable Foundation

Funders mentioned by rural/tribal NP interviewees:

- Notah Begay III (NB3)
- First Nations Development Institute
- Taos Community Foundation
- WK Kellogg Foundation

*“I think the recent changes to McCune Foundation funding has been good, funding organizations that collaborate with others, multi-year grant opportunities and their new Zone grant.”* (Nonprofit survey respondent)

NP survey respondents and rural/tribal interviewees said that in addition to funding the NP support system, funders also assisted with training, multi-year grants, collaboration, and technical assistance.

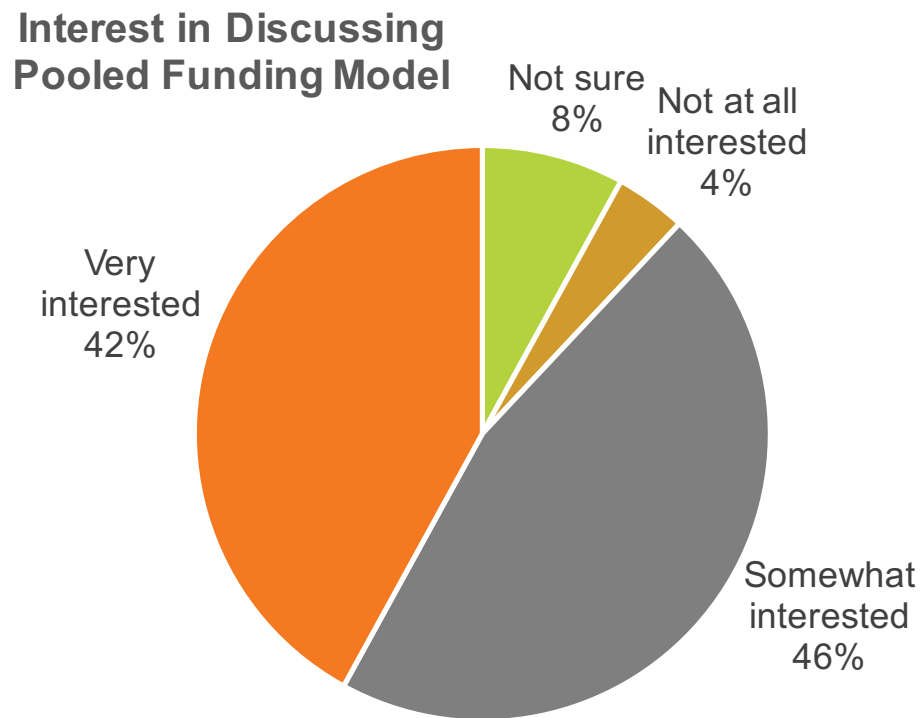
*“W.K. Kellogg Foundation has done an excellent job of supporting our organization training needs.”* (Nonprofit survey respondent)

*“Con Alma [Health] Foundation by supporting non-profits with capacity development. NB3 by funding non-profit cohorts in NM to work together.”* (Nonprofit survey respondent)

*“NB3 provided opportunities for grantees to get \$5000 grant and they paired you with TA provider, one was with Communications, specifically with Native communities. TA provider did facilitations. Lucky to have affiliations with larger NPs, outliers in sense that we've received a lot in both TA and supports from these national orgs. NB3 does thoughtful and effective things to create opportunities for TA and infrastructure support and to build collaborative native regional network.”* (Rural/tribal NP interviewee)

### High interest in pooled funding model among funders

There is a national campaign to encourage funders to pool funds to support the NP support system. This would mean every funders helps pay for the system, which is analogous to paying for utilities. In response to a direct survey question about interest in discussing what a pooled funding model might look like in New Mexico, almost half of funders said they were “very interested.”





# Financially sustainable services may subsidize those that cannot generate earned income with the right business model

Developing a business model for New Mexico's NP Support System was not in the scope of this study. However, information was gathered that may inform these future discussions. A large amount (~\$1 million) is already being contributed from philanthropy to NP support services without the benefit of full coordination and efficiency. Many support organizations already get some proportion of their costs from earned income as opposed to charitable support. Earned income could likely grow over time but the system would always need some amount of charitable support for the reasons described below.

A key consideration for the overall business model is the varying financial sustainability of different lines of business. Based on **economic theory**, different types of NP support services have different chances of becoming sustainable over time.\* Based on the research paper cited below, **professional and consulting services** require a **low degree of charitable subsidy**.

On the other end of the continuum, **advocacy, policy development, and research** typically require **high subsidies**. Other services fall somewhere in between.

Similarly, **smaller organizations** typically require higher subsidies and have a higher risk of failure.

This means an organization that primarily does advocacy/policy work is nearly impossible to sustain through earned income and will likely always need charitable support. However, one profitable line of business in the same organization can subsidize the less profitable services.

### Unique funding sources in other states:

- State government funding from a portion of annual fees required for nonprofits
- Organizational consulting fees
- Technology or software services
- Back-office services
- Strong corporate sponsors
- Federal AmeriCorps VISTA grants that include funds for the intermediary organization

\*Clough & Brown (2009). Financial models for infrastructure organizations. In *The Nonprofit Quarterly Study on Nonprofit and Philanthropic Infrastructure*.

# Recommendations

The following recommendations for Steering Committee consideration reflect a synthesis of all data sources as well as specific suggestions from study participants. These recommendations are intended to highlight potential action steps as opposed to being prescriptive. There are many more possible action steps embedded in this report that the Steering Committee may find more feasible, timely, or appropriate.

### Select “backbone organization” to facilitate and be accountable for a vision, priorities, and strategies

Many study participants mentioned the concept of a centralized organization or network in multiple ways:

- A neutral entity that has credibility
- A coalition or network of entities
- A nonprofit association
- One organization that takes responsibility for one or more support system components

Some discussed this entity as primarily doing advocacy while others had a broader view of the roles to include at least coordinating other NP support services. A few cautioned that funders should not lead.

Some participants, especially NP support organizations, recommended a plan to **measure the impact** of the organization or initiative.

At least initially, this recommended role sounds consistent with the role of a **backbone organization** in a collective impact initiative. A backbone organization guides vision and strategy, supports aligned activities, establishes shared measurement practices, builds public will, advances policy, and mobilizes funding. This role typically sits between a higher-level strategy-setting body and entities that operationalize the work. It may be a new or existing organization, or the role could be shared across multiple organizations. For more information on backbone organizations, see Stanford Social Innovation Review. ([https://ssir.org/articles/entry/collective\\_impact](https://ssir.org/articles/entry/collective_impact))

*“The infrastructure needs to be built based on nonprofit needs, not funders needs. As funders, we should be responding to the nonprofits. If the infrastructure is created by or driven by funders, the infrastructure will fail.”* (NP support organization interviewee)

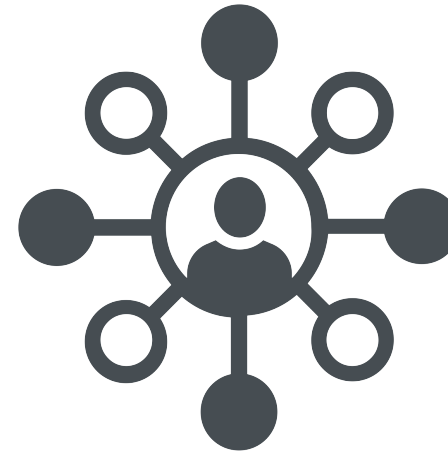
*“The biggest thing we need is a nonprofit association that advocates on behalf of nonprofit sector and that helps to collaborate around cap supports and orgs that are already doing the work, helps promote that, advertise that, help the sector move forward as a whole, help us fill the gaps. A nonprofit association that is integrated in the community and works for the community (nonprofit organizations).”* (NP support organization interviewee)

### Create partnerships with regional “hub” organizations in each part of the state

A primary function of the backbone organization would be to seek and incorporate voices from multiple perspectives. This includes NPs and NP Support Organizations serving localities or regions outside of the central corridor. The local NP support organizations need expertise and support too, and they will be there after everyone else goes home.

Based on experiences in other states, it is critically important for leaders and support organizations to travel regularly to communities, listen, and learn from communities. In addition, a more formal “regional hub” structure is recommended.

There could be a hub in each region of the state and for working with NPs in Native communities. Based on study results, organizations have been identified for Native communities and south, southwest, north central New Mexico. Regional hubs still need to be identified in southeast and northwest New Mexico.



The backbone organization could create numerous opportunities and avenues for 2-way dialogue with hubs to involve them in planning, setting priorities, making decisions, and implementing. Hub organizations would need funding to support their roles.

*“Set up some real hubs, so much of this type of work is built on trust, you don’t like to see experts come in for a little bit and leave, you want to build community and regional capacity to have access. We can have webinars and experts who come and leave AND we have to work on building capacity locally so that capacity for nonprofits stays in those regions.” (NP support organization interviewee)*

### Coordinate services, fees, and NP communication among NP support organizations seeking statewide reach

Multiple NP Support Organizations already work statewide or are interested in working statewide and are actively marketing their services and seeking ways to better communicate with the NP sector across the state (especially rural areas). Those actively seeking membership and/or subscription or service fees include:

- Center for Nonprofit Excellence
- NM Thrives
- SHARE NM
- The Grants Collective
- National Center for Frontier Communities/Nonprofit Resource Group
- 501(C)PA (formerly NonProfit Back Office Resources)
- NM Association of Grantmakers (looking at expanding audience beyond funders)

An early strategy for the backbone organization could be to **support alignment** of membership fees, benefits, and communication with NPs for services at these existing organizations.

Consider identifying **additional shared services** that have high value for NPs and could potentially be member benefits or lines of business for a future statewide association:

- Health insurance
- Pro bono legal services
- Information technology (suggestion to partner with CNM IT department)
- Data collection and/or client relationship management software (for example, Apricot by Social Solutions)

### Create a more strategic, coordinated, and tiered approach to nonprofit-level services

Possible strategies include:

- Select or create a **learning framework** to guide all nonprofit-level services.
- Formalize a **comprehensive Nonprofit 101 curriculum** that combines on-demand and in-person resources. Ensure this curriculum is available frequently with in-person support across the state through the regional hub model.
- In addition to coordinating training calendars, **coordinate training content, levels, and audiences**, then communicate these consistently in marketing materials so NPs are more likely to be able to find the right class for their role, experience level, and availability.
- Obtain or develop a **core set of training on diversity, equity, and inclusion** and support a cadre of trainers to deliver.
- Carefully explore more **interactive distance learning** approaches.

- Obtain or develop **organizational assessment tool** to help NPs identify areas where they want more support.
- Develop system for identifying, vetting, referring, and evaluating consultants when nonprofits need more individualized services.

Other states use various frameworks to structure their training and support services, including:

- Nonprofit Practices & Policies Guidelines (similar to those released recently by CNPE)
- Nonprofit Sustainability Framework (forakergroup.org)
- Three-tiered model representing individual skill-building, organizational development, and systems improvement

“Create seamless, affordable, accessible, coordinated infrastructure services state, regional and local, that allows nonprofits to use point in need services that are responsive to their individual stage of organizational development..”  
(Funder survey respondent)

### Identify or create an entity to lead advocacy efforts for the nonprofit sector as a whole

Respondents were very consistent that the NP sector in New Mexico needs a **designated advocacy voice**. However, they were split about who should fill that role. Some suggested NM Thrives which is already doing sector advocacy work.

Others said they were not sure if an organization already exists that is best-suited for this role. Some said it could be an organization, coalition, network, or task force.

One respondent suggested the New Mexico Center on Law and Poverty.

*“I think a visible, accessible and inclusive nonprofit advocacy organization could be helpful, but it must meet the collective needs of the sector. As such, those needs must first be identified and an advocacy platform can be built from that. Like many areas, nonprofit advocacy can gain momentum if it has universal buy-in and representation from various branches and fields in the nonprofit community.”* (Funder survey respondent)

Additional strategies will be needed to support **power-building within communities** and not just advocate at the state level. As a small example, the Community Resource Center in Colorado has a program called the Participation Project that supports nonprofits in offering nonpartisan voter engagement activities to their clients and community.

*“I think one organization or network should be tasked with nonprofit sector advocacy. When it's 'hodge podge' the efforts are inconsistent. The advocacy needs to be comprised of nonprofits themselves to voice their needs and concerns. This 'agency' could ensure that groups across the state stay connected.”* (Funder survey respondent)

*“We need a membership driven and directed nonprofit association for the state to advocate on our behalf. Previous efforts, such as NM Thrives, have been subject to lack of focus, sector support and a collaborative focus. State association membership has not been stressed as a way for all smaller NP's to join the advocacy effort.”* (NP survey respondent)



### Pilot and replicate innovative approaches to facilitating NP collaboration

More intentional and in-depth collaboration support is needed among NPs, NP Support Organizations, and funders. Here are some suggested actions to move forward in this area:

- Consider adopting an **underlying philosophy of sustainability** for New Mexico's NP Support System based on The Foraker Group's model in Alaska. In this model, the most important elements of sustainability are the right focus, people, partnerships, and then finances. The model is described in the book *Focus on Sustainability: A Nonprofit's Journey*.
- Support funders in continuing to learn about, pilot-test, and share lessons learned from **collaborative funding approaches** such as the recently launched Collaborative Zone grants.
- Learn about and identify ways to support and encourage **alliances of consultants** who provide support services to NPs. Other states use several different models for working with consultants.
- Assess the effectiveness and potential for replication of **local collaborative innovations**:
  - PNM-funded project in Valencia County between CNPE, UNM Eval Lab, and The Grants Collective
  - The Grants Collective's online social media platform
- Support and expand **existing forums** to promote collaboration:
  - Regional nonprofit conference in southern NM (started this year) that also included funders
  - NMAG's bi-annual statewide conference that includes funders and nonprofits



## Convene funders to align and/or pool funding

### Funding for nonprofits directly:

- Pilot-test Colorado's Rural Philanthropy Days model that creates space for funders, NPs, and other community partners to build relationships and learn from each other.
- Expand the combined grant application system through SHARE NM. If there are barriers to more funders participating, explore and address them.
- Pilot-test an aligned funding approach for the next round of the combined grant application system through SHARE NM. Learn about potential model from the Flagstaff office of the Arizona Community Foundation.
- Bring funders together to help attract and/or match out-of-state funding opportunities. Because they focus on bringing in outside funds to NM, the Grants Collective is well-positioned to lead this strategy.
- Create an "Impact-friendly Checklist" for funders to examine the extent to which their grant-making processes support important, effective, innovative, and collaborative work from the NP sector.

### Funding for the NP Support System:

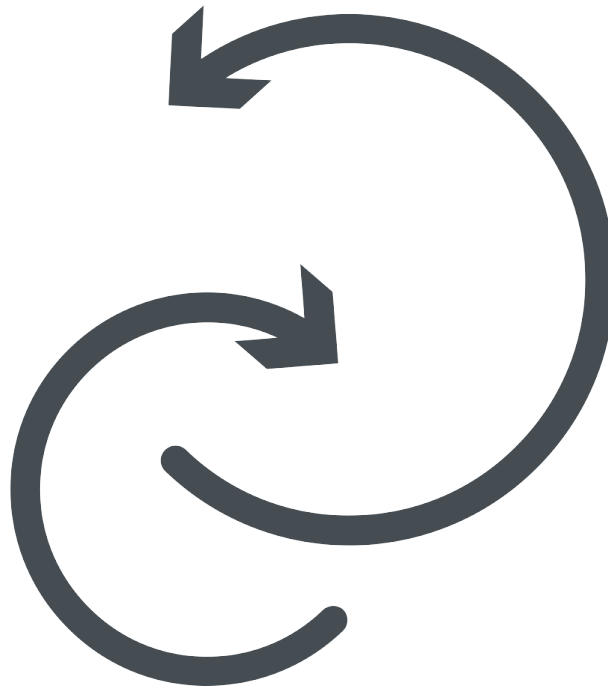
- Convene funders in NM to discuss what parts of the NP Support System they each currently fund and how funds could be more coordinated or strategic across funders.
- Convene funders in NM to discuss approaches to a pooled fund for the NP Support System.
- Leverage NM funders' influence and financial support to attract and obtain additional large national grants.

*"Our executive staff is very interested in supporting the nonprofit infrastructure and think that a robust nonprofit resource center would be a great asset predicated on several things, including: 1) consistent and reliable revenue model; and 2) really excellent trainers, coaches and facilitators who can do both intensive, advanced work with nonprofits as well as provide basic services."* (Funder survey respondent)

*"There needs to be agreed intentionality about the importance of improving capacity-building work, as well as the funds to support it. Not all funders share the intentionality and funding commitment."* (Funder survey respondent)

### Let the organizational structure of the system evolve

A common sentiment from multiple perspectives collected in this study was to **do something substantial but not necessarily create an entirely new organization overnight**. All recommendations in this report can be done well without necessarily creating a new organization, and results of these actions can lay the foundation for the organizational structure of the system to evolve over time. In fact, focusing immediately on creating a new organization could potentially draw attention away from the more critical decisions about priorities, strategies, funding, and key partnerships to build, especially in local communities.



# New Mexico Nonprofit Support Organization Profiles

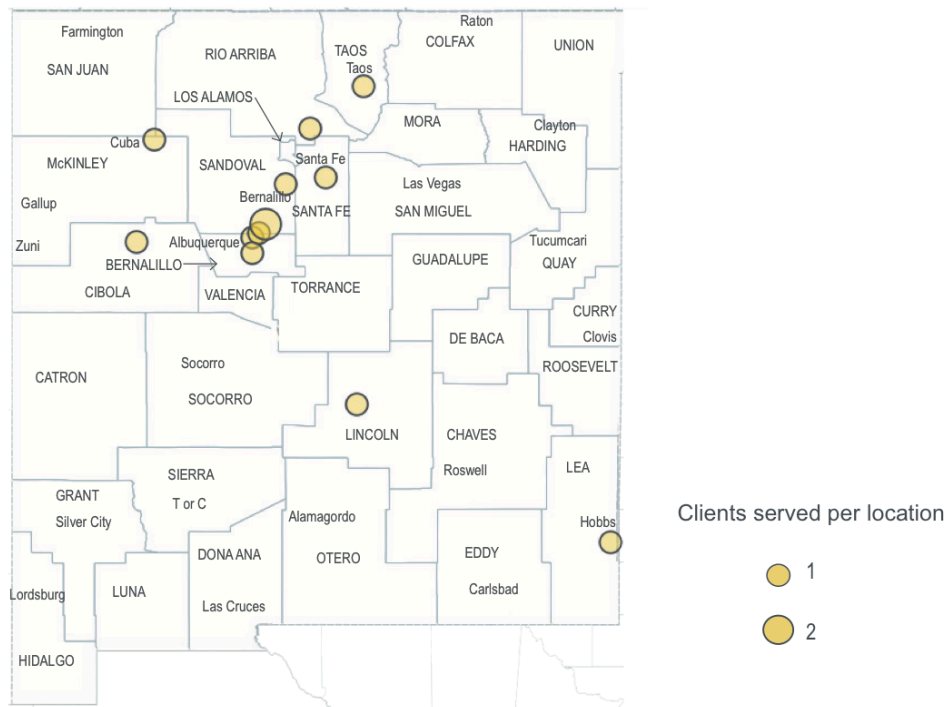
Nonprofit support organization interviewees provided extensive information about services, audience, funding, challenges, and opportunities. Based on this information, a profile for each organization\* was constructed and given to each organization to review. Most organizations also provided data about the locations of people and organizations they serve. These data were mapped to show each organization's reach. Because organizations provided different types of reach data, maps should not be compared but give a general sense of the reach of each organization.

\*Two interviewees do not have profiles because they were interviewed about specific services/initiatives rather than the organization as a whole.

<b>Organization</b>	501(C)PA (formerly known as NonProfit Back Office Resources)
<b>Interviewee</b>	David Rivard, CEO
<b>Tools</b>	Access to advanced accounting software at reduced price
<b>Vision and mission</b>	To help nonprofits accomplish more through our team-based, professional financial management and administrative services. To serve nonprofits at rates made affordable by efficiencies derived from specialization, cost-sharing with many clients, and partnerships with the funding community. To provide accessible services, even to remote communities, through the use of technologies like web-based, MIP nonprofit accounting software and paperless processes. And to reduce nonprofit management and clerical hours by providing accounting, payroll and other administrative tasks, allowing nonprofit management to redirect those hours to increasing mission impact.
<b>Services</b>	<p><b>Training and technical assistance:</b> Accounting, financial management services, and financial development training. Board development via presentations (i.e. 990 return, financial statements, board compliance, oversight/budgets). Leadership development and strategic planning with management and board, budget expresses strategic plan financially. Financial presentations (to describe services model, educate on reading financial statements or HR best practices) to groups of nonprofits on request. Fundraising supports (i.e. letter of financial services commitment, nonprofits, grant financial reports, tracking restricted/unrestricted funds, due-diligence interviews with funders, HR consulting, proposal reviews). Provide data security (back-ups, servers/power supplies, archiving records, access to historic documents, reports for audits and research).</p> <p><b>Most popular:</b> Accounting, payroll, HR consulting, CFO services, onsite/remote bookkeeping, board presentations, IRS 990 returns, annual reporting for payroll w2s and 1099 vendors, grant reporting. Core is accounting, payroll, financial management and compliance services.</p> <p><b>Services do not include:</b> Fiscal sponsorship, or assurance services as cannot audit own work (we are accountants for client being audited). Unable to teach classes as do not have resources to develop curriculum or staff recurring teaching obligations.</p>
<b>Audience</b>	Nonprofits, mostly in Bernalillo, Lea, Sandoval, Santa Fe, Hobbs, Grant, Doña Ana. Statewide reach is the goal.
<b>Outreach and access</b>	Outreach mostly word-of-mouth; recently rebranded website/messaging, seek/undertake speaking engagements. Foundations, supporters and clients help spread the word. Services provided via web-based software; in-person bookkeeping, board, committee or grantor meetings. Anyone with internet can share files, access financial, payroll and other documents. Substantial service sector with early childhood and tribal services organizations, >30% of client base. Also serve adult education, health/wellness, arts/culture, agricultural/environmental, and open government.
<b>Partners</b>	Clients are key partners; they provide cost-recovery level of earned fee revenues that eventually will allow 501(C)PA to achieve maintenance level of sustainability. Grantors are critical, allow time to achieve sustainability and support growth to accept more clients, which allows increase in impact /service revenues. Vendors: Lighthouse (hardware infrastructure for accounting/payroll software), Abila MIP (accounting software), Thomson Reuters (project/practice management software, capacity planning and IRS 990 preparation software), Adelante (office space).
<b>Evaluation</b>	Aware of huge need for accounting and financial support in the sector. Assess specific client needs and condition from prospective client information form and review of financial records and organizational policies. Exploring improvements to internal program evaluation for 501(C)PA, and seeking external assistance in professionalizing processes for measuring impact.
<b>Funding</b>	<p>75% funding comes from self-earn accounting services (client, HR consulting, and software recovery fees), 25% grants (working toward sustainability, current sizable monthly deficit supported by grant funds, 3-4 years until able to break even).</p> <p>2 main service areas: <i>front end</i> (systems design, bringing clients onto software) and <i>back office</i> (accounting, payroll). Client and/or grant funds (grant subsidies range from 40-80% of front end costs) cover sizable (several thousand dollars) front end cost for initial systems design and data migration onto cloud-based software. Back office recurring, fixed monthly fees (range from \$200 to \$3,000) for accounting, payroll, compliance services and financial reporting are based on estimate of staff time involved (driven by volume/complexity of transactions, number of employees and turnover experience, and administrative skill of client management).</p>
<b>Budget</b>	\$500,000 and growing every year
<b>Challenges</b>	Foundation support required for growth (~\$25K for new accountant, one-time investment as that person covers their own costs within 8-12 months by serving 7-8 new clients, that each pay \$1-\$1.5K/month). Finding talented staff i.e. certified, experienced, good communication and

	customer service skills, strong in accounting and software skills. Looking for an exceptional person, not easy in this market, it is competitive. Continuing to build and to maintain an organizational culture that is collegial, continually learning, and truly caring about our nonprofit clients and their missions, requires the hiring, retention and ongoing development of exceptional team members. Multi-year funding for capacity building (have single year, it is helpful, but does not cover what is needed to grow, plan and expand impact). Building racial/cultural diversity and fundraising capacity on the board is challenging as board and their networks are all white. Our chair is placing ads on digital-boards with a couple of foundations, but the accounting profession in general is 98% of European descent according to the AICPA, and this is our existing network environment. Challenging to increase racial diversity of staff for same reason.
<b>Opportunities</b>	Enormous need in the state for these services. Goal to add 6 more staff and 50-60 clients in next three years to support growth, increase mission impact, reduce financial risk and strengthen leadership and financial sustainability. Developing robust team, operations, enhanced messaging, outreach/communications through new brand (name, logo, website, messaging) will strengthen ability to take advantage of these opportunities.
<b>Needs</b>	Funding for new hires; in 2-3 years 501(C)PA will fund a new hire/year through organic growth in earned revenues. However, need for services is great now and 501(C)PA growth rate needs to meet demand to make meaningful impact. Strategic funding of \$50-75K/year will add 2-3 accountants and cover upfront demand on internal resources for training, etc. Also, ongoing funding for software licensing of \$12-20K/year allows us to charge minimal amounts to clients for software maintenance. Shift in nonprofit perspective on the value of quality financial and accounting services; culture in nonprofit sector does not value quality financial management/administration and seeks out lowest cost solutions. This leaves management ill-informed of operational performance and financial position and vulnerable to staff turnover, loss of data and institutional memory, and noncompliance with grant restrictions and regulatory requirements.

## 501(C)PA Reach

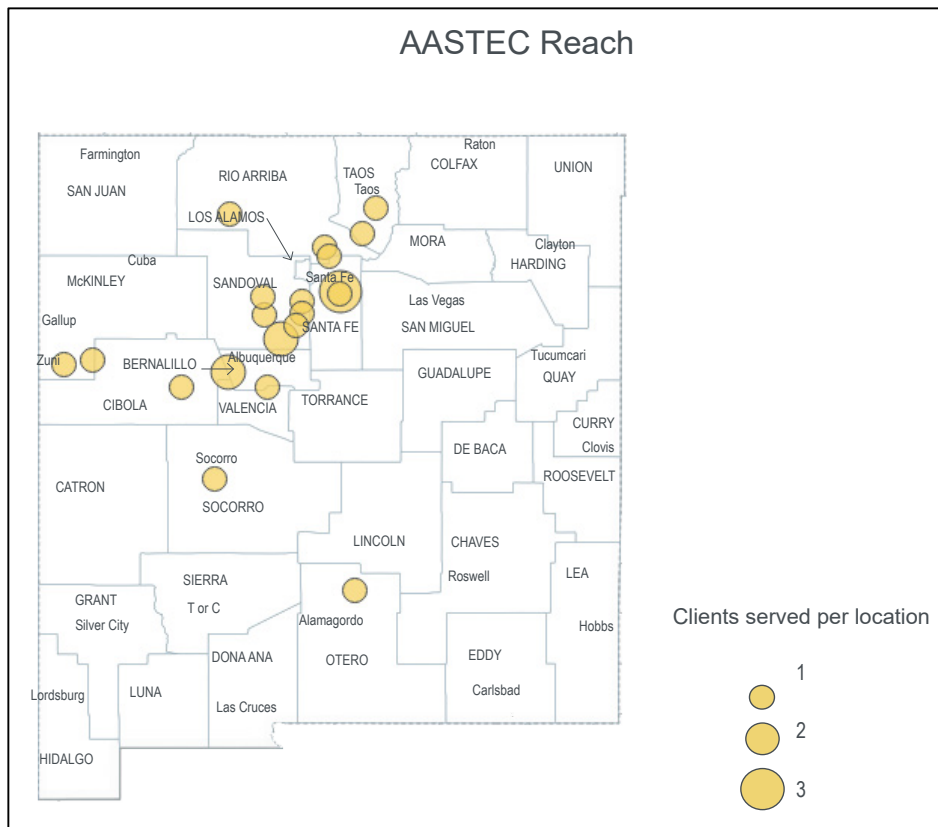


Reach data includes 501(C)PA clients by zip code (2015-18). Data provided by David Rivard in an email on 10/8/18.

<b>Support organization</b>	Albuquerque Area Southwest Tribal Epidemiology Center (Program of Albuquerque Area Indian Health Board)
<b>Interviewees</b>	Kevin English
<b>Unique focus or specialty</b>	Public Health Practice, Improving Health Data Quality and Access for American Indian populations
<b>Tools</b>	Southwest Indigenous Data Portal, Tribal Public Health Surveillance Systems
<b>Vision and mission</b>	<p>AASTECC's mission is to collaborate with the 27 American Indian Tribes in the Indian Health Service Albuquerque Area to provide high quality health research, surveillance and training to improve the quality of life of American Indians.</p> <p>AASTECC's health priority areas were established in cooperation with their Executive Council and include: Behavioral Health, Healthy Aging, Injury Prevention, and Chronic Disease Prevention and Management.</p>
<b>Services</b> What services or programs related to training and technical assistance of nonprofit infrastructure does your organization provide?	<p><b>Training and technical assistance:</b> Health directed services for tribes including strategic planning, evaluation, data infrastructure, data systems and data reports. Also provide grant writing workshops, marketing and communications, (hosted 2-day 'marketing-your-program' training for grantees). Most workshops are for all 27 tribes, typically have waitlist, prefer smaller training events to accommodate experiential learning activities 20-40 people. Tribal community health program staff make up a large portion of participant pool. Offer a minimum of 5-10 workshops/year (there are currently 11 projects and each project has capacity development focus).</p> <p><b>Networking and advocacy:</b> AASTECC Executive Council includes representatives from all 27 tribes, meets quarterly and has average monthly attendance of 20 out of 27 tribes. Purpose is: 1) to align AASTECC strategic priorities with tribal health communities and cultural considerations, 2) an opportunity to disseminate information, 3) <i>network</i>, 4) communication with and among communities about new grants. Executive Council participants are invited to attend AASTECC trainings, but AASTECC does not provide training specifically for this group. Executive Council has collaborated on issue-specific <i>advocacy</i> efforts.</p> <p>AASTECC also coordinates coalitions based on health priority areas.</p> <p><b>Funding:</b> Funding 20 sub-awards (some multiyear or single year) for health promotion or community health assessments. Finance provides accounting support to grantees upon request.</p> <p><b>Data and research:</b> Health research, improving access to and quality of health data for Native American populations. Collaborating with tribes to translate data into action, including strategic planning, and evaluation. Assists tribal health programs with the development of customized databases to monitor participant health status, track programmatic activities, and evaluate services.</p> <p><b>Most popular:</b> Grant writing and databases (have built customized databases for more than half of the 27 tribes).</p> <p><b>Unmet requests for services:</b> Do not write grants for community programs, but provide data and grant writing training.</p>
<b>Audience</b>	Tribal health programs (i.e. community health worker program, behavioral health programs, Special Diabetes Programs for Indians (SDPI), Wellness Centers, clinics (some run by IHS, some by tribes), tribal housing programs, etc., anything related to social determinants of health). Serves 27 tribes, in NM, CO and West Texas.
<b>Reach and access</b>	Still doing outreach, currently launching social media. Active listservs, AASTECC website, <a href="http://www.aastec.net">www.aastec.net</a> , mass mailings, needs assessment surveys, health fair attendance. Most programs in tribal communities know AASTECC, though still need to build more awareness among tribal members. Everything provided onsite and virtually, meetings are in Albuquerque and tribal communities. All tribes represented at all workshops, intentional about letting everyone attend. Executive Council meetings are full-day, typically in Albuquerque, AASTECC provides travel costs and stipends.
<b>Partners</b>	27 tribes are primary. Other partners include Departments of Health, Indian Health Service, higher education institutions, and tribal and non-tribal community based organizations.

<b>Funding</b>	Grant funded (mostly federal and some private foundations), tribal epidemiology centers written into the Indian Health Care Improvement Act.
<b>Budget</b>	\$5,000,000 (Specifically for AASTEC)
<b>Challenges</b>	Funding insecurity (completely funded by soft money, no security, may not be sustainable). Lack of time and people to be as creative as could be, when focusing on grant deliverables hard to think outside the box.
<b>Opportunities</b>	Multiple: student development (training future tribal public health professionals), advocacy and policy, legal services for tribes, supporting movement for tribal self-determination.
<b>Needs</b>	Human resources, grant writers, fundraising (diversifying funding base), tiered management structure, training for managers. Networking opportunities to expand partnerships, stronger collective focus on driving action and policy. More time and resources to drive action toward policy creation.

## AASTEC Reach



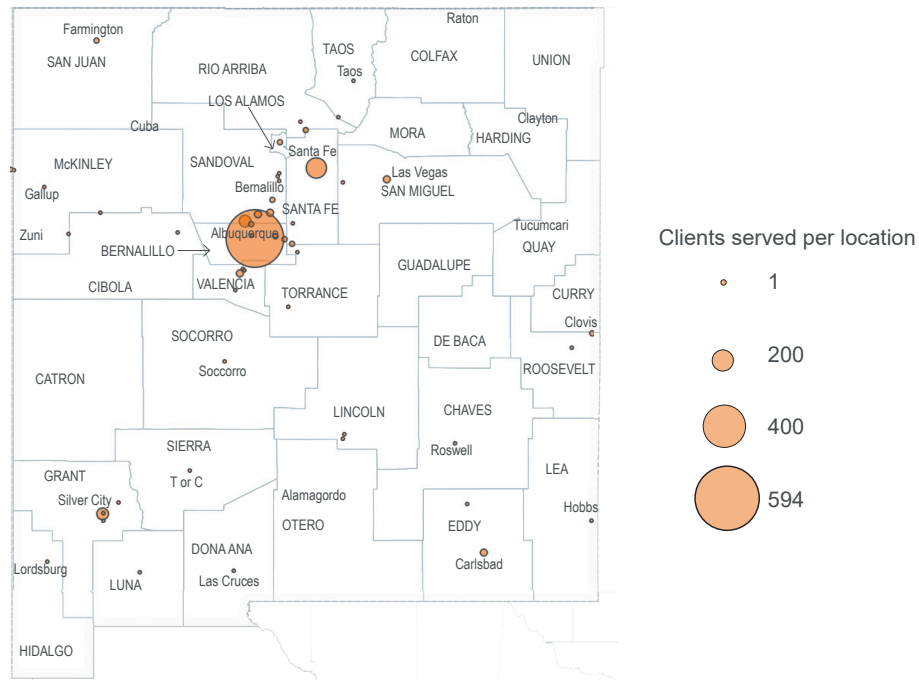
Reach data includes *zip codes* for the American Indian communities served by AASTEC in New Mexico. Approved by Kevin English in an email on 11/23/18.

<b>Support organization</b>	Center for Nonprofit Excellence (CNPE)
<b>Interviewees</b>	Larry Alei, Interim Director & Kira Luna, Education Manager
<b>Unique focus or specialty</b>	Dual roles in education and communication/connection for NP staff and board members. Development of comprehensive Principles & Practices Guide which was reviewed and sanctioned by the State of New Mexico Office of the Attorney General and the New Mexico Office of the Secretary of State.
<b>Tools</b>	<i>New Mexico Nonprofit Principles &amp; Practices Guide</i> and <i>Companion Workbook</i> ; Jobs and Volunteer Connection online databases; online Nonprofit and Grantmakers Directories.
<b>Vision and mission</b>	The Center for Nonprofit Excellence (CNPE) strengthens the capabilities and capacity of New Mexico nonprofits so they can more effectively meet their missions.
<b>Services</b> What services or programs related to training and technical assistance of nonprofit infrastructure does your organization provide?	<p><b>Accountability:</b> Recently published the <i>New Mexico Nonprofit Principles &amp; Practices Guide</i> to provide clear and comprehensive guidelines for all NPs in New Mexico.</p> <p><b>Information sharing</b> (online): Curated online resource library (aligned with training topics and the <i>Guide</i>); Nonprofit and Grantmakers Directories; live calendar of nonprofit management trainings that happen throughout NM and list webinars. Also serve as “megaphone” for NP sector to communicate about events, opportunities, etc. through email newsletters, website, and social media.</p> <p><b>Advocacy:</b> Have done ad hoc advocacy efforts at the NP sector level over the years. For example, creating a shared letter about potential tax changes at the state level last year and sharing with legislators.</p> <p><b>Workforce development:</b> Local manager for national Encore Fellowship Program with Intel as the local sponsor – Intel retirees can work at NP for 1,000 hours and get paid through Encore, CNPE makes and manages the matches with NPs when Encore Fellows are available. Also support NP workforce through online NM Nonprofit Jobs board, NM Volunteer Connection, Pro Bono Services.</p> <p><b>Funding:</b> CNPE coordinates and administers #GivingTuesdayNM, providing the technology platform, resources for NPs to have their own campaigns, help for donors to find NPs, and data about contributions. Also provide online NM Gifts In-Kind tool to coordinate non-financial contributions to NPs.</p> <p><b>Assessment:</b> The <i>Companion Workbook</i> for the <i>Principles &amp; Practices Guide</i> provides self-assessment checklists and worksheets for each of the practices in the Guide with a project plan template for each area of nonprofit management.</p> <p><b>Training:</b> Provide 20-30 trainings per year covering numerous topics (advocacy, board development, collaboration, communications/marketing, diversity/equity/inclusion, evaluation, financial management, fundraising, human resources, leadership development, technology, volunteer management, and special topics).</p> <p><b>Technical assistance:</b> NPs reach out through email, online form, and phone with any type of NP management inquiry. CNPE connects them to any resource whether it is the CNPE website, another website, referral to a consultant.</p> <p><b>Most popular:</b> Training, job board, and volunteer connection were identified in recent study about CNPE. Technical assistance is also another common service due to the large number of individual requests.</p> <p><b>Unmet requests for services:</b> Board retreats, CNPE webinars, rural trainings, strategic planning.</p>
<b>Audience</b>	Primary audience has been NP staff and board members in central NM but CNPE also serves NPs across the state. Most trainings and events are in-person in Albuquerque, which has made trainings primarily reach central NM NPs (see map below). Suite of online services and technical assistance requests are accessed from across the state and even from NPs outside of the state (not reflected in the map below).
<b>Reach and access</b>	Get almost 30,000 website hits each month – because of the general name and web address, people find the website quite easily within and outside of NM. Comprehensive web and email distribution mechanisms. Facebook, Twitter, LinkedIn.



<b>Partners</b>	Too many partners to list them all, but the main categories of partners include: other NP support organizations; consultants; and Secretary of State/Attorney General (legal compliance information).
<b>Funding</b>	Primarily supported by United Way of Central New Mexico; some revenue from training fees, Encore Fellow management, special project grants, and individual donations.
<b>Budget</b>	~\$260,000
<b>Challenges</b>	From education standpoint, being able to offer robust opportunities for rural NPs across the state. Broadband access to various parts of the state – we know we could record or create some online content but not sure how many people can connect based on technology infrastructure. In terms of our own revenue stream, we have to price services lower than their actual values and give scholarships because NPs cannot afford more expensive training.
<b>Opportunities</b>	Expand reach to be more statewide. Offer more in-depth trainings – cohort, multiple sessions, go deeper on a subject. Technology opportunities include online courses on-demand, for example. CNPE has traditionally partnered with consultants – going forward, we envision offering more workshops ourselves using <i>Companion Workbook</i> . Board development and strategic planning are unmet needs that we could help with. We are well-positioned to help with sector-level advocacy if not co-own this piece with someone else.
<b>Needs</b>	At different points in history CNPE has had more staff, and there is a need to have more staff capacity going forward to address all of these opportunities. Also need a plan for long-term financial sustainability in partnership with other support organizations.

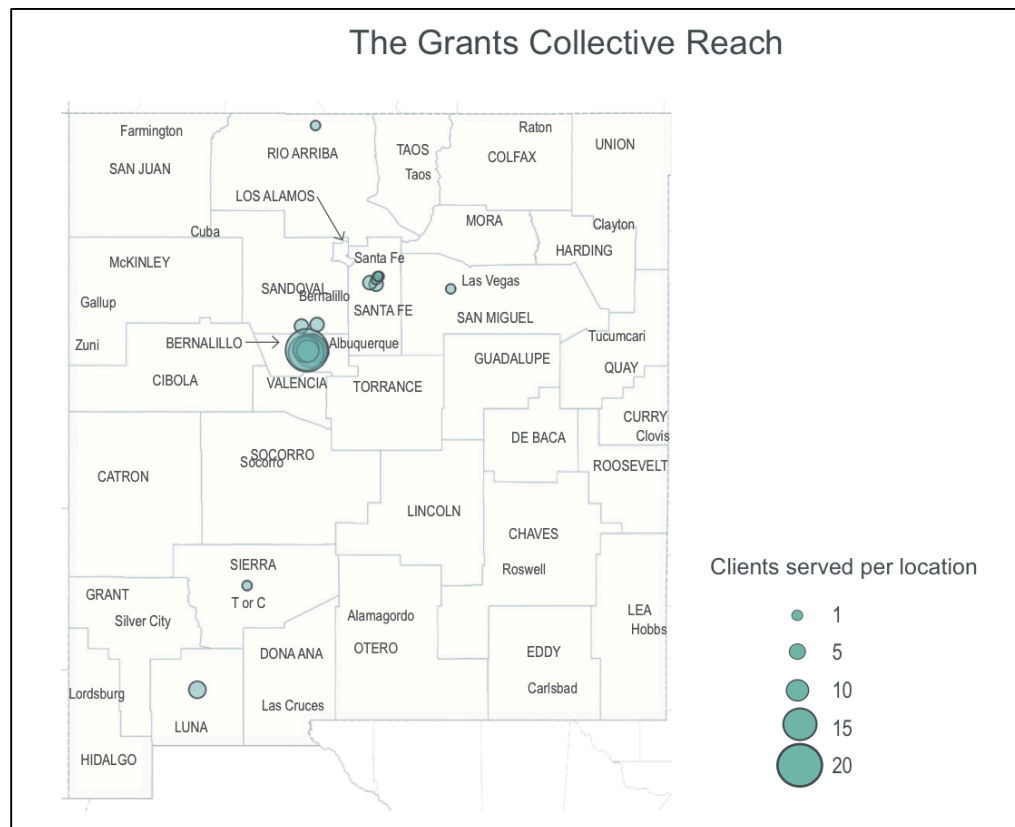
### CNPE Reach



Reach data includes *cities* where CNPE training participants were located over the past two years. Provided by Larry Alei in an email on 10/9/18.

<b>Organization</b>	The Grants Collective
<b>Interviewees</b>	Tara Gohr, Co-director, Erin Hielkema, Co-director, & Robert Nelson, Program Manager
<b>Innovation</b>	Social network platform, helping nonprofits secure grant money with emphasis on national and federal funding coming into NM
<b>Tools</b>	Funding calendars, organized by non-deadline (open opportunities), deadline-driven, and forecasted; templates for online applications, budget, logic models, and other attachments that make grant seeking easier; library/repository of curated resources for nonprofit organizations; feeds of blogs, how-tos, and other trends in the philanthropy field.
<b>Vision and mission</b>	New Mexico's nonprofits will have resources to dramatically improve social, economic, and educational outlook in the state. The Grants Collective (GC) builds grant seeking capacity of New Mexico nonprofits so that they are better resourced to achieve their charitable and social missions.
<b>Services</b>	<p><b>Training and technical assistance:</b> Fundraising, grant writing and preparation (including: data and research, partnerships, letters of support, etc.). Scaling individual nonprofit internal capacity to apply for bigger grants. Brown-bag trainings on grant making, how to write needs-statement, how to use new grants.gov platform, etc. open to the public, \$10/event. <i>Talent Academy</i> – intensive program for professional grant seekers, 4-months/10 hrs/wk, 4-hours in person, weekly professional development, lab time to work on projects, recommended readings, suggested videos to watch. Tuition is \$3500. <i>Cooperative Network</i> – social media platform connects nonprofits to NM-eligible national and federal grants, supports collaborative grant seeking, includes forums to self-select into special interest groups. Host monthly webinar on how to use platform. \$500 annual subscription also includes in-person events. <i>Grow NM</i> – how to put together complex financial packages, grant loan package, investing in revenue bonds, not necessarily grants but funds to help projects get developed.</p> <p><b>Consulting:</b> Free curbside consulting to Cooperative Network members.</p> <p><b>Resources:</b> Library of resources on budgeting, collaboration/collective impact, data/research, evaluation, federal grants, grant management, program design, prospecting, writing resources, proposals and templates (i.e. templates on grant applications, logic models and budgets).</p> <p><b>Networking and alignment:</b> Cooperative Network geared toward social networking, connect people quickly in real time to talk online about collaborative funding opportunities and partnership ideas. Breaking the silo, people see others interested in same opportunities and collaborate through tags and likes. People who share program related experience can partner quickly. Coordinates monthly, in-person brown bag workshops and other events. SINC and The Grants Collective host Impact &amp; Coffee networking events to build relationships around ABQ, open to the public.</p> <p><b>Most popular:</b> Curbside consulting, offered 2x/month, members fill out Google form to reserve 30-minute slot to talk through grant proposal, a concept that they want to have funded, good funding prospects for an idea, and/or to look through logic model. Concept and design in terms of what people should be emphasizing and writing about when applying for proposals. Mock review or peer review of grant proposals.</p>
<b>Audience</b>	Talent Academy geared toward nonprofits and government agencies with capacity to apply for and receive large grants, or nonprofits ready to take grant making to next level, have accepted start-up phase nonprofits and government entities. Cooperative Network is helpful for new nonprofits to learn how to apply for grants and network. Public agencies also appropriate, has included City of Albuquerque, Luna County, Albuquerque Public Schools, Deming Public Schools.
<b>Outreach and access</b>	Mostly Bernalillo, some Santa Fe, Luna and 5 Sandoval Indian Pueblos. Expanding to Valencia in partnership with CNPE (communications and marketing) and UNM Evaluation Lab to support nonprofits; first reach into rural and tribal nonprofits. Do not want to duplicate efforts of other nonprofit support organizations (specifically in Silver City) and want to work statewide. Online and social media driven, up-to-date website, bimonthly email newsletter, social media presence, event marketing on Facebook, regular in-person events. Outreach at conferences across the state, networking events/trainings (through CNPE), earned media coverage (KOB news spot, ABQ Journal op ed), funders help publicize, CNPE featured GC on their website, Nusenda sponsored GC in publication, CNPE included in newsletters, Grant Plant promotes GC.
<b>Partners</b>	Nonprofit support organizations (CNPE, Share NM, NM Thrives, SINC, NM Evaluation Lab are all major partners). Local funders - attend training sessions, give talks on accessing funds from their organization, panel participants and coaches for Talent Academy, great partners in trying to help all NM nonprofits access more funding. Partnership with Grow NM through fiscal sponsorship.
<b>Evaluation</b>	Assessed need based on frequent requests for training from and internships at Grant Plant, also talked with local partners about clients' needs. Track Talent Academy participant data by cohort, track year grants were applied for, which grants are awarded, how many out-of-state grants are

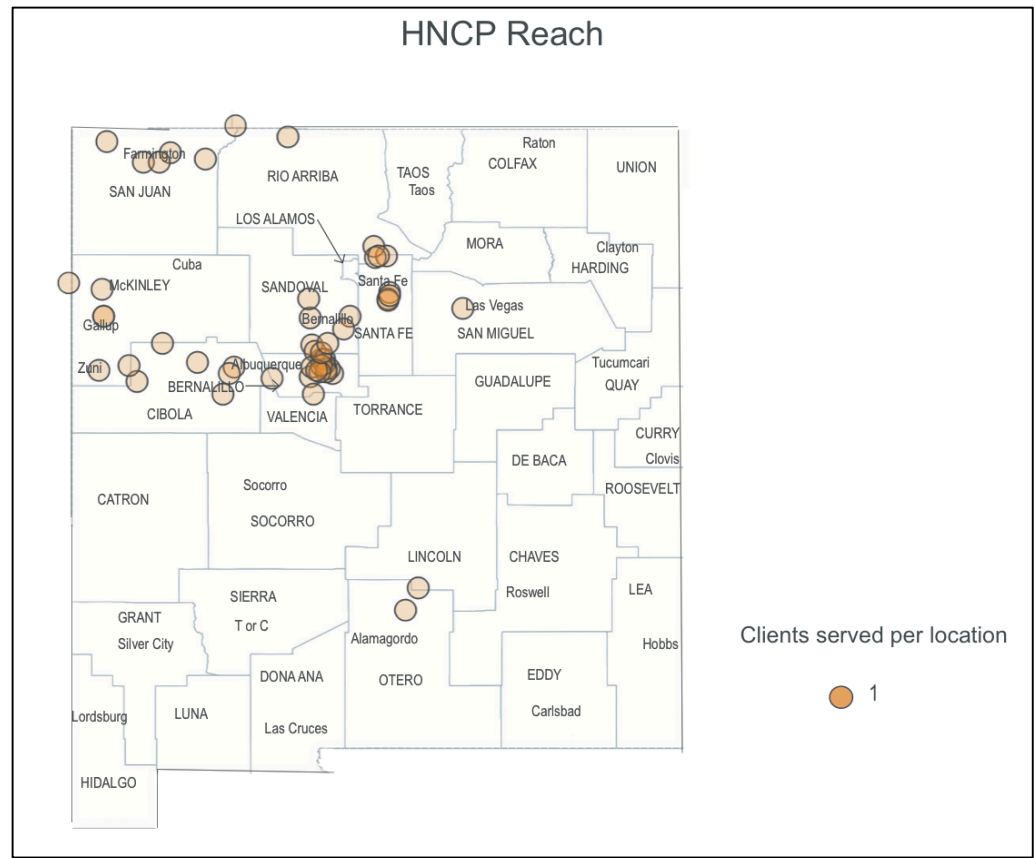
	received. Do not collect data on online platform, know it is working when membership grows, backend of platform shows who is using tool, how much and in what ways.
<b>Funding</b>	\$10K planning funds from Nusenda for first year, \$175K startup funds after that from City of Albuquerque Economic Development Action Account, McCune funding for last 3 years at \$20K, \$30K and then \$40K. Fiscal sponsorship fees from Grow NM. Earned income from Talent Academy and Cooperative Network. Fees do not cover cost of services, but could, Cooperative Network membership could lead to sustainability for Cooperative Network.
<b>Budget</b>	\$268,000 (with fiscal sponsorship fee from Grow NM \$551,000)
<b>Challenges</b>	Embarking on membership drive this year, few nonprofits have money for membership and professional development, sector as whole is under resourced in this way. Seeking sponsorships for nonprofits that can't join on their own is a challenge. Startup challenge, running 2 companies at the same time, Grant Plant and Grants Collective. Capacity and resources to hire a Community Manager to engage membership more effectively and meaningfully, and recruit more members. Broader challenge that nonprofits don't budget to pay for the kind of services we offer.
<b>Opportunities</b>	Developing a stronger network of nonprofit organizations for collaborative funding opportunities, and leveraging partnerships with government agencies and foundations to build grant-seeking capacity with local nonprofit agencies.
<b>Needs</b>	More opportunities to build rapport and collaborative opportunities with other capacity building organizations, and funding for capacity building.
<b>Future plans</b>	Provide equitable access to organizations that cannot afford fees by approaching funders to offset costs; work to get outside of Central NM; add Community Manager to team to engage membership more effectively and meaningfully and expand membership.



Reach data includes  
*Talent Academy Fellows*  
*(2016-18)* and  
*Cooperative Network*  
*Members (2017-18)* by  
*zip code*. Data provided  
 by Caitlin McAnally in an  
 email on 10/1/18.

<b>Organization</b>	Healthy Native Communities Partnership, Inc.
<b>Interviewees</b>	Marita Jones, Executive Director & Pam Valencia, Grants/Contracts Manager
<b>Innovation</b>	Based on Native American Indian community values, we have a non-linear way of having conversations that matter. We do things differently. We have guiding principles that provide a framework to the way we do our work, for example, the community is in the driver seat.
<b>Vision and mission</b>	Healthy Native Communities Partnership, Inc. is a national non-profit organization that works with Native communities to realize their own vision of wellness. HNCP supports capacity building, leadership development, partnership, and networking from the wisdom and strengths of local communities. All HNCP work is rooted in the honoring of tradition. Each Tribe and Native community is unique, and has its own stories and traditions. Many Native communities view health through the traditional concepts of balance, a consideration of mind, body, and spirit, and a sense of the wellbeing for all.
<b>Services</b>	<p><b>Leadership development:</b> Creating Community Circles for Change (C4) gatherings.</p> <p><b>Training:</b> Training is tailored for the needs of the particular group. For example, recently did a grant-writing workshop for AASTEC grantees and worked with AASTEC to plan and tailor the training. Have also done training in community engagement, coalition building, indigenous evaluation.</p> <p><b>Networking:</b> The Native Wellness Resource Network is a process facilitated by HNCP that brings Native people together to focus on the knowledge that lives in their communities. About 40-50 people were nominated as wellness champions from their communities. They came together for 2-3 days to share their strategies about what works in Indian communities. It is not that we are teaching them – they are the experts about what works. It is not a conference, not an expert panel. It is tapping into wisdom of community people. HNCP also creates opportunities for NM funders and Native groups and organizations to get to know each other better. Funders often contact HNCP to find out how to work better with Native communities and organizations. Native-led nonprofits often want to know more about funders too.</p> <p><b>Services don't include:</b> We get a lot of requests for consultations on all kinds of different things. We have to come back to how would each one serve grassroots community people in Native communities. We do organizational development, strategic planning, strengthening teams, if we have time. This shows there is a need for these kinds of services, especially from the Native perspective.</p>
<b>Audience</b>	HNCP serves indigenous communities in New Mexico and across the country.
<b>Outreach and access</b>	Most referrals come from word of mouth from Native communities or Native-led organizations. People hear that our work is based on Native community values and they contact us.
<b>Partners</b>	Albuquerque Area Indian Health Board, Albuquerque Area Southwest Tribal Epidemiology Center (AASTEC) – provide training to groups AASTEC works with about grant-writing, community engagement, and coalition building; Notah Begay III Foundation – WaterFirst Cohort to reduce sugar sweetened beverages and increase consumption of water and promotion of breastfeeding; UNM Center for Participatory Research, Indian Health Service, Navajo Nation Epidemiology Center – build capacity of local Navajo chapter communities to create and implement community wellness projects, Centers for Disease Control, Navajo Nation Chapter communities, Pueblo communities, Apache Communities, Ute Communities, McCune Foundation, Con Alma Health Foundation.
<b>Evaluation</b>	Plus/Delta process with community trainings and organizational meetings, paper and online surveys, observations and communication with priority groups, polls, collaborations with UNM Community based Participatory Research/Evaluation team, review of literature and reports.
<b>Funding</b>	Initially, most funding came from Indian Health Service (IHS) and HNCP served all 12 IHS service areas across the country. This money has not been available for the past several years. Funding now comes from grants and contract work.
<b>Budget</b>	~\$650,000
<b>Challenges</b>	Building relationships with funders. HNCPs does a lot of this, but some small nonprofits do not have the same opportunities. When nonprofits do have these opportunities, it is possible for them to invest a lot of time into building relationships and then still not get funded, or have funding priorities shift after a few years. On the funder side, they often have limited staff to visit and build relationships with Native communities and organizations.
<b>Opportunities</b>	Critical mass of nonprofits that could share services in places such as Farmington.

<b>Needs</b>	Health insurance; legal representation; information technology. How can small nonprofits pay for these things especially when there are limited administrative funds available through most grants?
<b>Future plans</b>	Interested in applying Wellness Network model to look at economic development in Navajo communities.



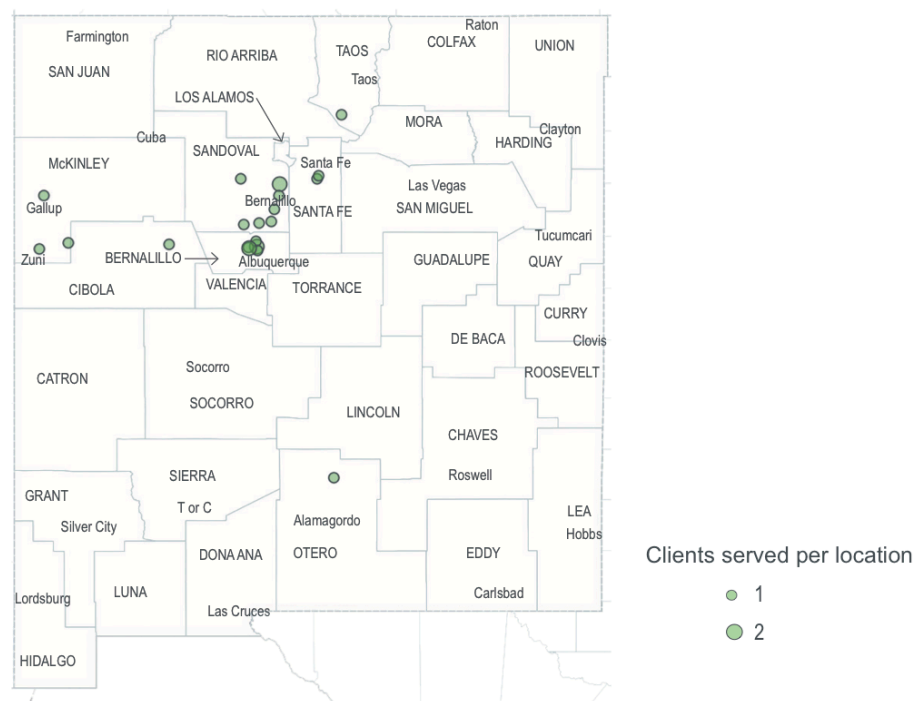
Reach data includes *zip codes served\* by HNCP*.  
Data provided by Tina Tso in an email on 11/6/18.

\*participated in nonprofit-organizational and/or issue-specific trainings, received coaching/technical assistance, and/or participated in network building strategies

<b>Organization</b>	Notah Begay III Foundation
<b>Interviewee</b>	Michelle Gutiérrez, Program Officer
<b>Innovation</b>	Indigenous evaluation model; grantee cohort model for delivering training/technical assistance and to support networking; digital storytelling.
<b>Vision and mission</b>	Changing the health future for Native American children by investing in long-term preventative strategies to reverse the high rates of diabetes and obesity. The NB3 Foundation supports infrastructure, technical/financial support to bolster culturally appropriate solutions and prevention programs. The NB3 Foundation invests in evidence-based, community-driven, culturally relevant programs that promote health for Native children and communities. Grantmaking provides Native American communities, tribes and Native-led organizations with tools, information and inspiration to create sustainable change that benefit children's health. NB3FIT is a direct service program to get youth healthy/active through sports, learning about food, nutrition, healthy lifestyles, leadership and cultural values like respect, self-persistence, teamwork and self-discipline.
<b>Services</b>	<p><b>Training and technical assistance:</b> Geared towards tribes and Native-led nonprofits. The NB3 Foundation advocates for technical assistance funds from funders and then passes those on to grantees either by providing TA to a grantee cohort or providing funds to a tribe to seek customized TA. Also provide training (i.e. grant writing, community health assessments, etc.) locally that is open to all grantees and the NB3 Foundation may cover travel. Grantees are required to participate in technical assistance if it is part of their grant, which happens in the majority of cases. Touchpoints vary, sometimes technical assistance is one time for a grant, other times there may be upwards of 10 technical assistance events in grant cycle.</p> <p><b>Consulting:</b> The NB3 Foundation may provide funds to grantees to hire someone with special skill set to do tailored technical assistance. The NB3 Foundation connects tribes to organizations or Native consultants for specific consulting requests that the NB3 Foundation does not provide.</p> <p><b>Networking:</b> One of biggest priorities is connecting tribal and Native-led programs and nonprofits to each other, the NB3 Foundation provides personal support and networking services to grantees and anyone who calls for support in this area. The NB3 Foundation often serves as a connector between NM Department of Health and a certain tribe.</p> <p><b>Data and research:</b> Provides training for access to data and research, collects data and provides it to nonprofits, creates a fact sheet on Native youth and health. The NB3 Foundation experiences challenges collecting state-level data from NM Department of Health.</p> <p><b>Evaluation:</b> Created indigenous evaluation model, doing evaluation from indigenous perspective. Provides training on this for the NB3 Foundation grantees.</p> <p><b>Most popular:</b> Evaluation, data collection and analysis, digital storytelling, grant writing.</p> <p><b>Services don't include:</b> Board development, strategic planning.</p>
<b>Audience</b>	NB3 Foundation Community Partners (grantees), mostly tribes, tribal programs, Native-led nonprofits. Training/technical assistance resources available to general public. Webinars are open to the public and posted to website and online.
<b>Outreach and access</b>	Online outreach (social media, email, extensive listservs), personal outreach, the NB3 Foundation networks (AASSTEC, IHS Health Promotion Diabetes Prevention Group). Targeted outreach when needed in order to reach all tribes. Relationship building is critical for access, trust is a big issue with Native communities, the NB3 Foundation attends events in the community to build relationships. Events reach wide audience (annual conferences, golf tournaments, charitable events, comedy events, community health assessment and grant writing workshops, webinars).
<b>Partners</b>	Healthy Native Communities Partnership does strategic planning, collaboration and fundraising, good partner in serving grantees. Community partners/grantees teach a lot in terms of collaboration, communication and other unique skill sets (i.e. cultural keeper, how to talk to elders), lean into community partners' unique skills in order to provide services back to them.
<b>Evaluation</b>	Survey-monkey and personal phone calls used to assess needs and inform training agendas. Post-training debriefs inform future sessions. Grantee satisfaction surveys and reporting with grantees inform evaluation (i.e. what can be done better, what are service training needs, how to strengthen community knowledge). Reports on grantees' learnings and challenges.  Piloting indigenous health model, have created indigenous evaluation framework, created preliminary outcome indicators to assess impact. In-house evaluation specialist tracks progress on logic models for grants awarded and funding received.
<b>Funding</b>	Private foundations, large national foundations (specifically in health), tribal nations and individual donors, no government funds. The majority of funds received are multi-year.

<b>Budget</b>	\$750,000 for Strengthening Community Knowledge (training/TA) (\$3,500,000 as an organization)
<b>Challenges</b>	Funding, even though large budget, play same game trying to bring money in to do work. Understanding of native perspective and indigenous ways of thinking, indigenous values do not align with western, hard to operate in western spaces. For example, different perspective on evaluation from western, it is a challenge to articulate this and in order to play in these circles need acceptance and tolerance for different (from western) ways of being and doing. The way the NB3 Foundation speaks is not always recognized or valued nationally, but in NM it is. Challenge to stay true to the NB3 Foundation knowledge and practice rather than bend to pressure of national way.
<b>Opportunities</b>	Indigenous perspective, NM resonates with this perspective (including relationships, trust, family), excited about uplifting indigenous/ancestral ways of knowing, uplifting what has been passed down through generations. Momentum to see strengths-based and asset-based perspectives. The NB3 Foundation is changing NM narrative and, with other organizations, is pushing back on national/western perspective to define what is best for NM communities.
<b>Needs</b>	Could always build nonprofit capacities (board and leadership development, strategic planning, collaboration, evaluation, fundraising/grant writing, communications/marketing, human resources, technology, accounting/financial management, legal services). Funding so staff can stay in their lane and do what they do best, currently HR staff is also CFO, technology staff is also communications and marketing. Leadership development focused on people of color. Hone skill sets to operate and challenge nationally and in funder circles.
<b>Future plans</b>	New grant will focus on building a strong network of Native-led organizations and tribes working to increase physical activity among Native American youth in Albuquerque and surrounding areas.

## NB3 Reach



Reach data includes *NB3F* grantees over the last 4 years (2014-2018). Almost all grantees receive technical assistance components that range from annual conference attendance to cohort model participation. Data provided by Michelle Gutiérrez in an email on 9/24/18.

<b>Organization</b>	Ngage New Mexico
<b>Interviewee</b>	Lori Martinez, Executive Director
<b>Innovation</b>	Role as backbone organization for collective impact education initiative; informal nonprofit support services such as monthly executive director lunch; started and spun off a social enterprise called “We are IT” to provide IT support for nonprofits.
<b>Vision and mission</b>	Ngage New Mexico is an established 501(c)3 nonprofit organization that focuses on education and nonprofit capacity-building. We embrace collaboration, consensus building, social justice, racial equity, and data-informed solutions for the betterment of our community.
<b>Services</b>	<p><b>Training and technical assistance:</b> Co-hosted first annual southern NM nonprofit conference with Community Foundation of Southern New Mexico, several other partners, and funding from sponsors – conference drew 170 attendees and included funders’ forum for nonprofits to talk to funders and find out if it was good fit to submit application; pilot-tested Emerging Leader program to support nonprofit leaders in articles of incorporation, issues of equity, strategic planning, and other skills they need to run nonprofits; provide Board Source training for nonprofits; still provide small amount of individualized, confidential consulting services to nonprofits. Partnership with SHARE New Mexico to host resource directory on Ngage NM website. Completed pilot Emerging Leaders program in 2017.</p> <p><b>Data &amp; research:</b> Conducted survey of Executive Directors in southern NM (south of Socorro) with Center for Community Analysis at NMSU and used results to guide conference agenda and other services.</p> <p><b>Networking and collaboration:</b> Started monthly Executive Director lunch roundtable for capacity building grant from McCune, it has continued after grant ended with EDs taking turns hosting; serve as backbone organization for the Doña Ana County SUCCESS Partnership Education Initiative.</p> <p><b>Most popular:</b> N/A</p> <p><b>Unmet requests for services:</b> N/A</p>
<b>Audience</b>	Doña Ana County
<b>Outreach and access</b>	Primarily serve Doña Ana County <i>A map of Ngage’s reach is not included.</i>
<b>Partners</b>	Community Action Agency of Southern New Mexico (rent space in their building, share part-time development officer, partner on many initiatives); Community Foundation of Southern New Mexico; Las Cruces Green Chamber of Commerce; United Way of Southwest New Mexico; NMSU Center for Community Analysis.
<b>Evaluation</b>	Work closely with NMSU Center for Community Analysis to collect and use data for SUCCESS Partnership and other projects.
<b>Funding</b>	Primarily grant funded including some larger grants from Kellogg Foundation, Daniels Fund, and McCune Foundation as well as smaller grants; 21 <sup>st</sup> Century Learning Center funding from NM PED.
<b>Budget</b>	\$750,000
<b>Challenges</b>	Leadership development for youth and young people in southern NM. On-going funding for all services including Emerging Leader program, annual conference for nonprofits in southern NM. Tapping into other potential fundraising sources such as major and planned gifts from individuals rather than going for the same small pool of funds as every other nonprofit in the area.
<b>Opportunities</b>	Southern NM is known for building true partnerships that are heavily based on relationships. nonprofits in this area do not want “transactional” relationships, which is what they perceive happens primarily in northern NM. There will always be competition but there is also the belief that we can do things better together.
<b>Needs</b>	A hub for nonprofits to get what they need and possibly even be co-located, share services, etc. Diversifying funding sources and building relationships with funders. Access to just-in-time legal services for nonprofits. Solid understanding of the statewide economic impact of nonprofits in NM.
<b>Future plans</b>	Currently undergoing strategic planning process to determine what nonprofit support services should look like for the area and how Ngage can best contribute.



<b>Organization</b>	New Mexico Association of Grantmakers
<b>Interviewee</b>	Cathy Frey, Executive Director
<b>Innovation</b>	Serve and support both philanthropic funders and nonprofits in New Mexico; philanthropy being part of the nonprofit sector
<b>Vision and mission</b>	New Mexico Association of Grantmakers is dedicated to increasing the effectiveness and impact of organized philanthropy in New Mexico. NMAG is a regional philanthropy membership association and network that provides programs, research and educational resources, and networking opportunities for grantmakers, funders and nonprofits throughout New Mexico. Members include representatives from a cross-section of private foundations, public charities, governmental grantmakers, corporate philanthropy and individuals giving across the state.
<b>Services</b>	<p><b>Networking, education, learning:</b> Offer events including webinars, meetings, forums, summits, other online communication strategies for philanthropic funders to learn about philanthropy and the nonprofit sector. Every other year NMAG hosts a 2-day conference that is centrally located that includes nonprofits and philanthropy. Conference offers numerous opportunities for networking, education, and training. Last year's conference focused on advocacy and policy and financial sustainability of nonprofits. Also, gives presentations around the state to nonprofit groups about philanthropy in NM.</p> <p><b>Policy, research, evaluation:</b> Host the NM Foundation Data Dashboard on NMAG website in partnership with the Foundation Center. The dashboard gives detailed data about giving in NM. NMAG also conducted two recent reports that describe philanthropy and its scope. Planning to create some research briefs to disseminate findings even more (for example, Rural Philanthropy). Planning a transfer of wealth study for NM to capture future contributions of family members who are transferring their wealth to their children. All data and reports are available to the public and designed to provide useful information to nonprofit sector.</p> <p>In the policy area, NMAG formed a funder group last year that would have been poised to counter the bill in the legislature about taxing charitable contributions. They are working on Census 2020 get out the count campaign – including opposing the citizenship question in the Census and working directly with nonprofits to get a fair and accurate 2020 Census count.</p> <p><b>Partnership and collaboration:</b> NMAG's goal is to provide opportunities for funders to interact with other sectors including nonprofit sector. In bylaws, NMAG is directed to inform funders about issues facing nonprofits. In particular, the annual conference brings together nonprofits and funders. Collaborative funding models offer other opportunities to leverage funding and support nonprofit and charitable sector work.</p> <p><b>Leveraging philanthropic assets:</b> NMAG leverages and coordinates available financial and non-financial resources to support the nonprofit sectors. They also form partnerships with funders in other parts of the country to bring in resources or write grants for matching funds. For example, to fund Census-related work, NMAG helped to leverage over \$250K that will eventually go to nonprofits through re-granting to help reach hard to count communities to complete the Census.</p>
<b>Audience</b>	Grantmaking and nonprofit organizations. Members are national, regional or in state funders that also includes individuals and organizations in support of philanthropy and the nonprofit sector. Organizations, consultants and individuals do not have to be a member to benefit from services, member benefits include: discounts on events, meetings, conferences, other benefits.
<b>Outreach and access</b>	<p>Increasing webinars and remote participation through video conference options. Public access to website resources and information including New Mexico Foundation Data Dashboard.</p> <p><i>A map of NMAG's reach is not included as most members (funders) are in cities by default, which may not truly represent where they work.</i></p>
<b>Partners</b>	Major institutional grantmakers in the state (mostly NMAG members) and key nonprofit organizations that work statewide (NM Voices for Children, Think NM, NM First, etc.). Out-of-state partners include other associations of grantmakers or philanthropy serving organizations. Part of United Philanthropy Forum.
<b>Evaluation</b>	Exploring how to enhance evaluation, currently use organizational operational measurements (i.e. revenues, reserves, membership) and as measure look at: growth in memberships and partnerships, ability to influence policy, and leveraged dollars brought to state/local communities.
<b>Funding</b>	Grants, membership dues (~30-40%), trainings fees (~25%), professional service contracts, sponsorships. Conferences can cost \$35-\$40K; last year sponsorships subsidized nonprofit conference attendees such that attendees paid \$100 rather than \$300.
<b>Budget</b>	It varies year-to-year but is typically ~\$125,000

<b>Challenges</b>	Capacity (including money and people); reaching rural, Native communities.
<b>Opportunities</b>	Use relationships to leverage financial and non-financial resources on behalf of nonprofits. Would like to support identifying community needs (i.e. assessing community needs, researching community needs, amplifying community voice that articulates their determined needs) and doing more policy work.
<b>Needs</b>	Build communications and marketing capacity. Telling NMAG's story, selling NMAG on our website on behalf of New Mexico communities.
<b>Future plans</b>	Increasing policy work, collaborative philanthropy, working on building nonprofit capacity infrastructure.

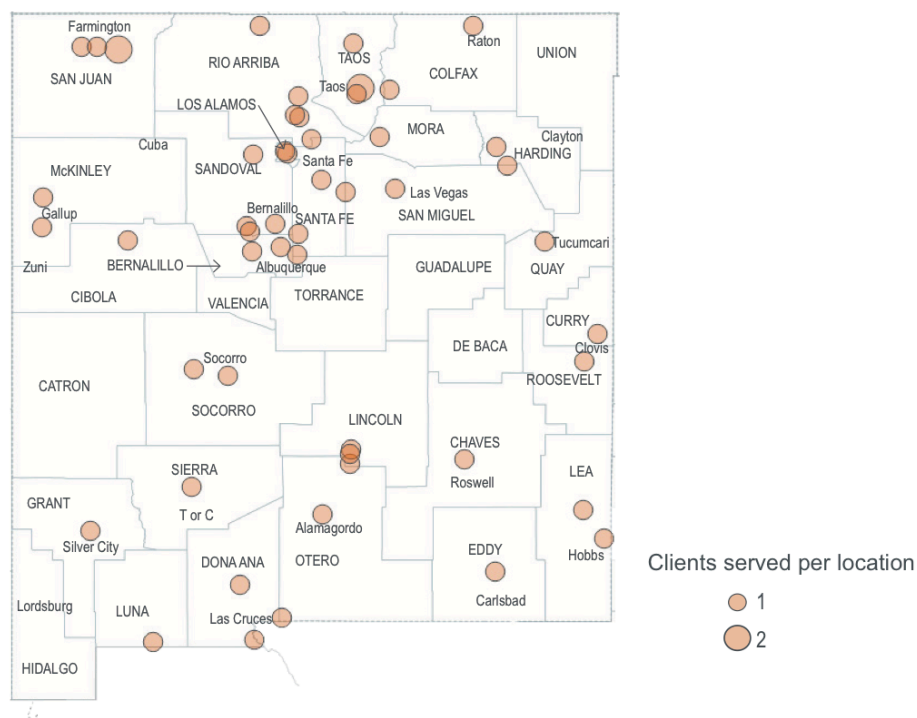
<b>Organization</b>	New Mexico First
<b>Interviewee</b>	Heather Balas, President and Executive Director
<b>Innovation</b>	Civic engagement
<b>Vision and mission</b>	New Mexico First is a public policy organization that engages people in important issues facing their state or community. We offer unique town halls and forums that create concrete, actionable recommendations for policymakers and the public. We also produce a wide range of policy reports on issues such as water, education, healthcare, the economy, and energy. Our research and facilitation services are available to public and private entities. New Mexico First acts as a catalyst for positive change by engaging citizens in policy and enabling action.
<b>Services</b>	<p><b>Training and technical assistance:</b> Strategic planning with nonprofits and communities.</p> <p><b>Data and research:</b> Primary activity is policy research and independent research on critical issues in NM (statewide, regional or local). Research findings are shared with people to inform dialogue and build consensus.</p> <p><b>Convener:</b> Town halls, forums, and other convenings to bring people together to dialogue, deliberate and solve problems. Deliver policy recommendations developed by consensus to appropriate change makers.</p> <p><b>Advocacy:</b> Advances consensus recommendations developed by New Mexicans at the deliberations above. Staff and board do not select advocacy priorities; the public does.</p> <p><b>Most popular:</b> Identification of consensus solutions that lead to actionable reforms (i.e. 15-point platform to improve higher education).</p>
<b>Audience</b>	State of NM, work on behalf of every community in the state
<b>Outreach and access</b>	<p>Statewide listserv utilized for email outreach, people opt-in to receive emails and there is high utilization and representation from all 33 counties, statewide events elicit attendees from across the state; NM First also does radio spots.</p> <p>Board of directors includes 33 members from across the state with equal representation from 3 congressional districts, creating benefit of rural and tribal representation in leadership. Rural and tribal outreach include mix of technology and in-person; people register for town hall in advance, if no representation from certain area additional outreach takes place there.</p> <p>NM First has had representation at their last three town halls from 30 of the 33 counties in the state. Additionally, since 2016, the organization has held 27 public deliberations in 14 counties.</p> <p><i>A map of NM First's reach is not included, NM First convenes people on behalf of organizations and government agencies in many communities across the state.</i></p>
<b>Partners</b>	Partners vary by topic; each focus has a working coalition to advance change (i.e. different set of partners to organize nonprofit summit than education forums). At each deliberation a research paper is presented; statewide research committee oversees that.
<b>Evaluation</b>	Assess impact by gathering data by topic, project and event via individual feedback forms (i.e., how helpful was background report, how helpful was event, how has confidence in democratic process changed). Also assess impact by consensus recommendations that result from the work, and action taken based on those recommendations, track what has happened because of recommendation (i.e. 7 bills came out of recommendations from groups convened by New Mexico First).
<b>Funding</b>	Government, corporate, foundation and individual donors
<b>Budget</b>	\$850,000 (including Share NM budget of \$200,000-\$250,000)
<b>Challenges</b>	Helping advance changes based on recommendations, have a good system to develop recommendations built on consensus, challenge is seeing action result from these. New Mexico First is not a government entity so cannot change laws or regulations directly; instead it influences policymakers, private sector leaders, nonprofit organization and others in positions to make official changes. Implementing change and communicating it are the hardest part of the work.
<b>Opportunities</b>	Trying to make NM stronger in focus areas (education, economics, natural resources, healthcare, effective institutions). Lots of opportunities to see change in the programs, policies and legislation affecting each of the areas.
<b>Needs</b>	Funding, clear communication from funders about available resources and method of deployment, losing a quarter of staff time on fundraising and adapting information on outcomes/needs to the different communication styles and reporting requests of different funders. Increased

	access to legal services would benefit nonprofit community. Evaluation, different goal posts from each funder. Collaboration, lack of time to collaborate, and make the mistake that networking is collaborating. Collaborating is harder, but when it's done all do better. Learning how to collaborate, and to do it well and sustainably and in a way that is distinct from networking.
<b>Future plans</b>	Advancing policy reform in higher education, health, poverty and water. Advancing programmatic reform in the arena of nonprofit capacity and system integration including creating a programmatic home for SHARE New Mexico.

<b>Organization</b>	New Mexico Thrives
<b>Interviewee</b>	Tsiporah Nephesh, Founder
<b>Innovation</b>	Advocacy, research, shared services for nonprofits
<b>Vision and mission</b>	New Mexico Thrives envisions a vibrant thriving New Mexico where everyone is empowered to achieve their greatest potential. NM Thrives works towards that vision by advocating for the New Mexico nonprofit sector and by promoting, strengthening and connecting individual organizations. The result is healthy and effective nonprofits serving their communities through direct services and advocacy.
<b>Services</b>	<p><b>Training and technical assistance:</b> Trainings offered across the state in grant writing and board development, also is a referral source for nonprofits to learn about trainings offered by other nonprofit support organizations. Training is secondary to other nonprofit support activities and based on request.</p> <p><b>Advocacy:</b> Follow state and federal legislation for proposals impacting nonprofit sector. Scan sector-influencing legislation (i.e. 2017 House Bill 412 which would have taxed nonprofits), understand implications, email nonprofits about current developments and actions they can take, send information about legislative committee meeting times and locations. Follow the states' efforts to tax nonprofits, attend Revenue Stabilization and Tax Policy Committee meetings. Ongoing relationship with National Council of Nonprofits to monitor national trends and federal legislative actions affecting nonprofits (i.e. efforts to repeal Johnson Amendment which governs nonprofits' nonpartisanship), notify NM nonprofits about national landscape and provide action steps. Presented data from financial outlook survey to Revenue Stabilization and Tax Policy Committee. Met with Chief of Staff for Speaker of the House to present proactive agenda for the nonprofit sector. Met with gubernatorial campaigns regarding their positions on nonprofit issues.</p> <p><b>Data and research:</b> Conducted nonprofit financial outlook survey to research the financial viability and vulnerability of NM nonprofits. Highlighted the potential consequences if the state taxed nonprofits. Useful information for funders as well.</p> <p><b>Networking:</b> Connected to a number of nonprofits, making connections for them for potential partnerships.</p> <p><b>Alignment:</b> As a state nonprofit association, NM Thrives helps coordinate alignment through convenings and conferences. Examples include: 2017 convening of the Center of Southwest Culture, the National Center for Frontier Communities, and Covenant Pathways to develop an ecotourism co-op to launch in 2019; throughout 2018, convened Covenant Pathways, Work in Beauty, Tolani Lake Enterprises, and a number of individuals in Gallup to improve health outcomes, this new collaboration has a mission, vision and values, is developing programs and reviewed grant opportunities; in 2018, connected Tolani Lake Enterprises and the Co-op Catalyst to create worker-owned meat processing plant on the Navajo reservation in Arizona; in 2017, introduced Whittier Elementary to Feed the Kids to distribute weekly bags of food to 60 kids throughout the school year.</p> <p><b>Most popular:</b> How to access funding and grant writing training, strategic connections and advocacy on tax issues</p> <p><b>Services don't include:</b> Accounting, bookkeeping</p>
<b>Audience</b>	Nonprofit sector throughout NM
<b>Outreach and access</b>	<p>Outreach takes place through connections and partnerships, affiliated with Nonprofit Resource Group in Silver City, The Grants Collective, Center for Nonprofit Excellence, United Ways around the state and some community foundations. Website, mailing list, networking, and word-of-mouth. Offered an information session in partnership with NM Voices to prepare for the 2017 special session via Zoom to be accessible statewide. Geographic reach includes: Carlsbad (United Way requested grant writing and board training for nonprofits from Carlsbad and surrounding area), Clovis (UW of Eastern NM requested grant writing and board training for nonprofits from Clovis and Portales), Taos (Taos Community Foundation organized board training), Gallup, Ramah, and Vanderwagen (Covenant Pathways (a nonprofit) organized grant writing and grant research trainings). The financial outlook survey reached nonprofits throughout New Mexico, with organizations from 53 communities responding. Email outreach is also widespread.</p>
<b>Partners</b>	Center for Southwest Culture (fiscal sponsor), SHARE NM, Nonprofit Resource Group, The Grants Collective. No current structure to support these partnerships, partners are clear about not duplicating efforts, although all partners acknowledge the difficulties of serving a large geographic area. For example, SHARE NM aims to be info and referral hub, to centrally locate resource directory and nonprofit information about collaborative

	efforts. Although there are a number of capacity builders in NM, no one was advocating for the nonprofit sector in general. NM Thrives chose to meet this need by creating a nonprofit association to advocate for the NM nonprofit sector. Partners utilize each other's mailing lists, talk and meet periodically. Partners would like to work more together, but have had limited success in securing funding to support these efforts. NM Thrives is also a member of the C3 Roundtable, with the Center for Civic Policy. This partnership coordinates advocacy efforts throughout the NM nonprofit sector.
<b>Evaluation</b>	Very early stages thus do not have full evaluative process. Evaluate advocacy efforts by the number of nonprofits responding. Currently utilizing anecdotal accounts to assess effectiveness.
<b>Funding</b>	All funding comes from membership fees and donations. NM Thrives has not applied for grant funding because it wants to be able to work with funders on an equal footing.
<b>Challenges</b>	Startup phase of organizational development, because there is no outside funding, or money to hire staff, the challenge is balancing advocacy work with membership growth.
<b>Opportunities</b>	Grow the membership, have a strong voice for nonprofit sector, bring nonprofits together with funders, policy makers and decision makers.
<b>Needs</b>	Marketing and funding
<b>Future plans</b>	Decolonizing Summit in 2019 to address the systems, policies, and funding practices that perpetuate inequity.

## NM Thrives Reach



Reach data includes *zip codes of 2018 financial outlook survey participants*. Data provided by Tsiporah Nephesh in an email on 11/9/18.

<b>Organization</b>	Nonprofit Resource Group (a program of National Center for Frontier Communities)
<b>Interviewee</b>	Susan Wilger, Executive Director
<b>Innovation</b>	Rural and frontier, small nonprofits, community coalitions
<b>Tools</b>	Capacity assessment tool for nonprofits and community coalitions, NRG facilitates process using tool with 3-7 staff and board members, or with a coalition steering committee, and writes report on findings.
<b>Vision and mission</b>	<p>The Nonprofit Resource Group (NRG) recognizes that community, nonprofit organizations and coalitions are: the fabric of democracy, a major economic force, form an essential piece of the larger social safety net, and are on the front lines of identifying and delivering essential human services. To do all this, nonprofits need to be strong, resilient and innovative.</p> <p>The Nonprofit Resource Group is dedicated to helping build and sustain nonprofit and other community organizations so that they can fulfill their invaluable roles in society effectively and sustainably, in partnership with private business and government.</p>
<b>Services</b>	<p><b>Training and technical assistance:</b> Training and TA based on needs of nonprofits. NRG also specializes in working with community coalitions. An annual training/TA calendar is distributed with monthly offerings (either 1-hour topics or 3 to 6-hour skill-building workshops). Topics are chosen based on feedback forms collected at the end of trainings and results from nonprofit surveys conducted every other year. Interactive trainings are designed for nonprofits and coalition members to learn from each other. In 2017, 7 peer learning sessions were initiated with nonprofits in Silver City, Deming and Carlsbad. Specific trainings available by request, for example, one request included Community Coalition training 1.0 and 2.0.</p> <p><b>Consulting:</b> Free, 1-hour consulting to nonprofits (5 hours/year to each nonprofit) offered statewide, 80% happens in southwest NM, 20% beyond the southwest region. Market rate fee-for-service for long-term (1 month to 1 year) consultations (collaboratively develop scope that guides work). NRG uses a consultant community of practice (CCOP) model, consisting of a core of 6-10 nonprofit experts in addition to NRG staff. The consultant is matched to the nonprofit need. The CCOP model allows NRG to be flexible, adaptable and keeps operating costs down. There is a discount offered to Grant County nonprofits due to underwriting with geographic specifications.</p> <p><b>Networking:</b> National Center for Frontier Communities (NCFC), the parent organization of NRG, has history of promoting nonprofits at state level. It co-hosted a 2-day nonprofit conference a few years ago. NCFC/NRG helps to facilitate issue-specific networks (e.g. substance use prevention, food/hunger issues, etc.). Led 2 meetings in 2017-2018 with five state-wide nonprofit capacity builders to discuss improving collaboration and capacity building services for rural nonprofits.</p> <p><b>Data and research:</b> Annual nonprofit survey administered to nonprofits in southwest region. Will move to every other year beginning in 2019. Issue-specific research and data collection. For example, conducted research on sustainability and succession models and adapted existing models to be more relevant to smaller nonprofits.</p> <p><b>Advocacy:</b> Sector advocacy is important to NRG. It has a history of working with legislators to pass sector-specific legislation (i.e. house memorial 129 to improve collaboration among the nonprofit, public and private sectors). Provides advocacy trainings with nonprofits annually.</p> <p><b>Popular services:</b> Training (free and paid), brief (curbside) consulting, training and consulting topics (popular consulting requests include sustainability, grant writing, board development, strategic planning, starting a nonprofit).</p> <p><b>Services do not include:</b> If requests are for capacity, NRG refers to appropriate resource (e.g. Bookkeeping, QuickBooks training)</p>
<b>Audience</b>	Focus on nonprofits in communities that are less than 50,000. Typically work with nonprofits with small staff and budgets.
<b>Outreach and access</b>	Currently, trainings are offered primarily in Silver City. Have also offered public training in Deming and Carlsbad. Have experimented with offering trainings via video-conference. Curbside consulting and fee-for-service consulting services are offered in-person or by video conference. NRG has served nonprofits throughout the state. In the process of building relationships with nonprofits in southeast NM and offered 3-4 trainings in Carlsbad in 2017-18 with outreach to surrounding counties. Travel based on request to offer trainings. Since 2015, NRG has served an average of 44 unique nonprofits/year (ranging between 30-60 annually), and provided an average of 10 trainings for nonprofits/year.
<b>Partners</b>	Center for Nonprofit Excellence, New Mexico Association of Grantmakers, Community Foundations (particularly Grant County Community Foundation, Community Foundation of Southern NM, Santa Fe Community Foundation), United Way, NM Thrives, SHARE NM, NM Health Equity Partnership, Southwest Center for Health Innovation.





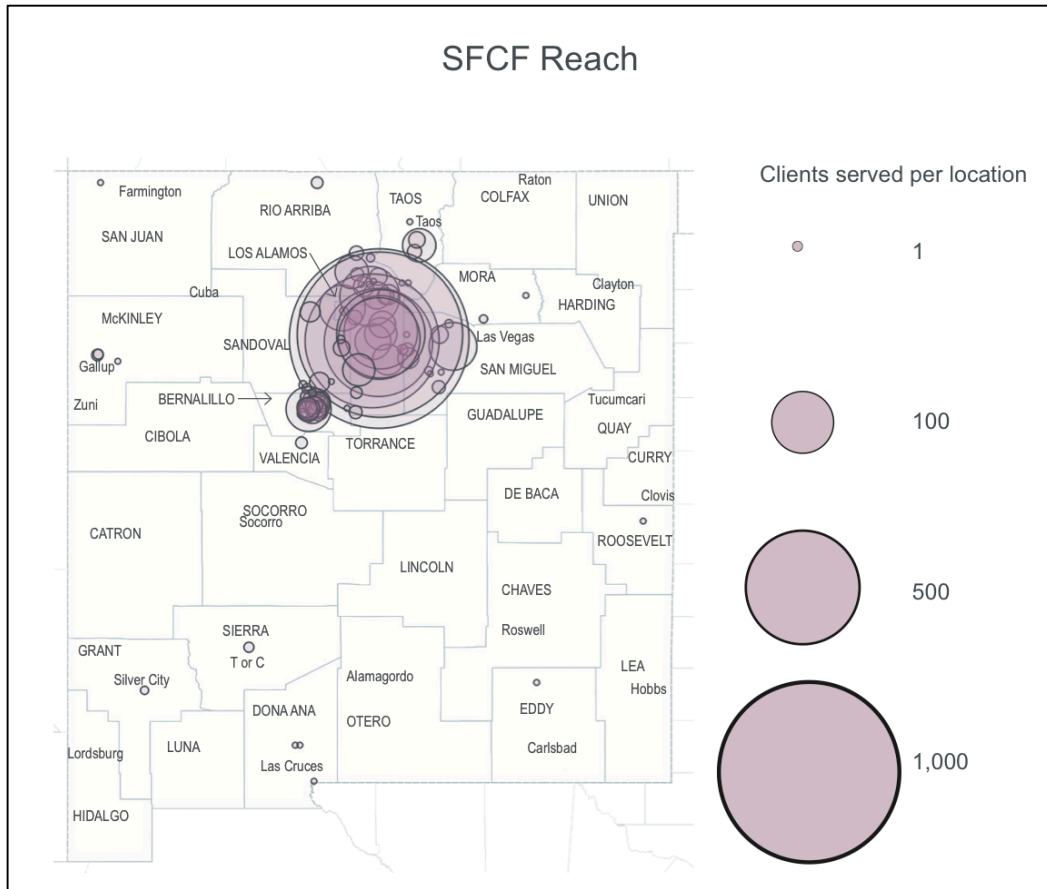
<b>Organization</b>	New Ventures Consulting
<b>Interviewee</b>	Anne Hays Egan, Principal
<b>Innovation</b>	Community and system development
<b>Tools</b>	Publications, simulations, scenario planning, mapping, group cohesion, asset-based planning, building from the spiritual values that drive positive, sustainable change.
<b>Vision and mission</b>	Working together to build vibrant, sustainable communities.
<b>Services</b>	<p><b>Consulting:</b> Community and system asset-based development; community needs assessments and health needs assessments; gap analyses. Leadership development, planning, interagency collaboration, and broad community system development with groups of nonprofits, government agencies, foundations, and businesses. History of providing TA in a broad range of topics for agency and network capacity building. Expertise in strategic, systems and business planning; network development; research; evaluation; facilitation; complex systems change.</p> <p><b>System development:</b> Community-system development planning to meet benchmarks, (analysis of community need, identify issues of concern, community discussions, gaps and services, strategies to develop services; research, planning, fund acquisition, structures and policies, community-engagement along the way). Projects run between a few months, to a year, or multiple years. Much of the system development work has been issue-specific, though nonprofit-sector issues are themes through all system development projects. Systems often have one or more backbone organizations, a government leader, and key funders.</p> <p><b>Research, assessment and service/funding/policy alignment:</b> Research, assessment and system alignment work for governments and funders (Middle Rio Grande Economic Development Association four-county system; Presbyterian Health Services Community Health Needs Assessment; Rio Arriba County Behavioral Health Investment Zone; Grant County Collaborative Community Plan for Older Adults; Santa Fe County Gap Analysis with Pam Hyde, FQHC workshop training in building a Medicare Suite of Services.)</p>
<b>Audience</b>	<p>Work with nonprofits and local governments in many counties in New Mexico, including: Rio Arriba, Taos, Santa Fe, Sandoval, Socorro, Sierra, Catron, Valencia, Hidalgo, and Grant counties. Also work in other states.</p> <p>Issue specific with focus on: sustainable community development, health, behavioral health, and workforce development. Nonprofits, local and state government, and foundations. Many statewide projects.</p>
<b>Outreach and access</b>	Local, regional, statewide and other western states.
<b>Evaluation</b>	Assess community need using primary and secondary data analysis from research, models, evidence-based practices, surveys, key informant interviews and town halls. Regular client feedback on project progression and project outcomes inform the evaluation. Compare reports with other similar reports from different authors. Track client progress on mutually agreed-upon goals using benchmarks.
<b>Funding</b>	Nonprofits, communities, local governments fund most services; some receive grant and contract funding to help underwrite costs.
<b>Challenges</b>	Selecting those projects that have the most potential leverage to build vibrant communities, and leverage positive systems change.
<b>Opportunities</b>	Increasing focus on guiding groups to build from their core values, or spiritual base. Guiding groups to not only focus on the needs, but also on the assets, and tap into the deeper reservoir of the power of compassion, joy and interconnection.
<b>Needs</b>	More time; opportunities to collaborate with other consultants on large projects; resources for sharing success stories and impact.
<b>Future plans</b>	Continue with selected community-building projects; help communities address and overcome large structural issues that block positive change; guide age-friendly community development. Launch the Community Forecaster tool to project how communities can identify and overcome challenges.

<b>Organization</b>	Oak Hill Coaching and Consulting
<b>Interviewee</b>	Ian Esquibel
<b>Innovation</b>	Facilitation, coaching, organization development
<b>Vision and mission</b>	Vision - We live fully present to enjoy the wisdom, resourcefulness and beauty in each other Mission - To facilitate self-empowerment, healing and well-being
<b>Services</b>	<p><b>Consulting:</b> Leadership development, strategic planning, team development, communications and marketing, some grant writing, some financial management with budget support, life coaching, executive coaching. Bringing efficiency, effectiveness, synergy to nonprofit sector. Business tools to support nonprofits.</p> <p><b>Coaching:</b> With leaders to provide thought partnering and space to process and reflect.</p> <p><b>Facilitation:</b> Run meetings that are efficient and support forward movement, so that people leave 2-hour meeting knowing what they have done and what to do next.</p> <p><b>Most popular:</b> Organizational development (including strategic planning, team building and leadership development), some board development, streamlining organizational flow (organizational chart and allocating budget accordingly). Budget work, fundraising, sustainability, communications (one-pager for board and community with accessible, succinct message). Problem solving and individual leadership development.</p> <p><b>Services don't include:</b> Financial management, budget management, fundraising/grant writing, deep board development, evaluation.</p>
<b>Audience</b>	<p>Individuals, nonprofits and public organizations with focus on people of color, racial equity and social justice, focus on nonprofits and anyone in that space, currently mostly in Albuquerque. Worked with many groups led by people of color, primarily Hispanics, women.</p> <p>As a part of LEH Consulting Group have worked with National Hispanic Cultural Center, NM Wildlife Federation, Albuquerque Police Department and Central New Mexico Community College.</p>
<b>Outreach and access</b>	<p>Word of mouth, NM is small, if people like the work, then they refer. Website launched 2-3 months ago. Starts with who is interested, seeking good fit on both sides.</p> <p><i>A map of Oak Hill Coaching and Consulting's reach is not included as that data was not requested of consultant interviewees.</i></p>
<b>Partners</b>	<p>LEH Consulting Group – Leslie Hoffman leads this business and its development, as work comes up she configures team of consultants for the project. Consultants come from range of fields (i.e. nonprofits, education, philanthropy, journalism, finance, community development, others) and offer wide range of experience useful to nonprofits. Consultants working together, focused on working with really good people rather than protecting turf.</p> <p>Previous clients are partners. And the group of people that all received their coaching credentials together, the NM cohort, refer each other for work and are partners in that way (there are about 6 people in that cohort).</p>
<b>Evaluation</b>	<p>Informal process for consulting feedback, conversational at onset and throughout to identify what success would look like, desired outcomes, and if those are on track. Coaching feedback in a work-closing session (this is what you said you wanted, did you get it?). Referrals and/or testimonials show positive experience.</p> <p>Process with LEH Consulting more formal including surveys (did we do what we said, how well, what did you learn, what are you excited about?).</p>
<b>Funding</b>	<p>Organizations receive grants for organizational development or strategic planning, allocate that money to consultants. Grants that support organizational development come from McCune, WKKF, national foundations outside of the state. Coaching is funded by private individuals (market value - \$150/hr) and services are offered at sliding scale to nonprofits.</p> <p>Some consultants might supplement with national and out-of-state clients where market rates can be higher. They may contract with 1 or 2 organizations, rather than be FTE at one nonprofit, this way consultants get a fee for a capacity they fill (fundraising, management, etc.) for one organization and other funding for something else with another organization. Contracts with groups outside of NM may help the bottom-line, because market is different. Also consultants blend portfolio by working with nonprofits, private and public.</p>

<b>Challenges</b>	<p>Balancing work and life. Marketing and aligning services provided with funds available. If there is a finite amount of local money for organizational development and consultants for nonprofits, how do consultants grow their business? Good people want to work in NM, and to sustain consulting in NM many need to supplement with work in other, larger regions. Though there is a true desire to work in NM, lower market rates drive consultants to work with others outside of state to keep bottom-line healthy.</p> <p>Redundancy in the nonprofit sector can be frustrating, nonprofits fighting for same funds and providing similar services. Merging and affiliating makes a lot more sense.</p>
<b>Opportunities</b>	<p>Excited about future of CNPE, and hopeful that NMAG puts out an RFP, and funds something to emerge from this report.</p> <p>One dream is Consultant Alliance that is structured and activated to support nonprofits. Hopeful that nonprofits speak loudly about what is needed and that foundations respond and fund the human capital and talent to support those needs.</p> <p>CNPE and Landscape Study highlight evaluation side of nonprofits, interested to see which groups are doing evaluation and how they might get together and work with foundations on how foundations provide a feedback loop to nonprofits. What is the meta-analysis of all the grant reports and how can that learning inform future efforts?</p>
<b>Needs</b>	<p>Networking, especially statewide to expand geographic reach. All nonprofit support pieces would be helpful (training and technical assistance, advocacy, data and research, funding). Advocacy is still growing, using policy to make changes, advocating for the sector at the state level</p> <p>Selecting good people to do good work. Human resources, talent development, NM expertise, adjusting nonprofit pay scale to support people with families.</p>
<b>Future plans</b>	<p>Grow coaching and consulting services to support leaders, nonprofits, institutions and systems; develop a model for collective coaching and community dialogues that explore local socialization and historical challenges; offer space to have conversations which are often avoided.</p>

<b>Organization</b>	Santa Fe Community Foundation – The Philanthropy HUB
<b>Interviewee</b>	Annmarie McLaughlin, Director of Community Programs
<b>Innovation</b>	The majority of our programs are designed for nonprofit practitioners (staff and board members) with an emphasis on cohort-based leadership programs for board members, emerging leaders, executive directors, and women of color leaders in the sector.
<b>Vision and mission</b>	<p>The Santa Fe Community Foundation is devoted to building healthy and vital communities in the region where: 1) racial, cultural or economic differences do not limit access to health, education or employment, 2) diverse audiences enjoy the many arts and cultural heritages of our region, and 3) all sectors of our community take responsibility for ensuring a healthy environment.</p> <p>The Santa Fe Community Foundation's Philanthropy HUB has been designed as a learning and gathering place for the philanthropic sector. Nonprofit board and staff members, donors, advisors, and the general community attend programs and events each year designed to: deepen philanthropic practice; build nonprofit capacity; provide support for professional advisors; provide platforms for learning about social issues in our community.</p>
<b>Services</b>	<p><b>Training:</b> Workshops address nonprofit infrastructure and best practices, including board development, finance, communications, evaluation, strategic planning and fundraising. Multi-session, cohort-based programs include the Board Orientation Program (in partnership with SCORE Santa Fe), Executive Director Learning Circle, Emerging Social Sector Leaders, and New Mexico Women of Color Nonprofit Leadership Initiative.</p> <p><b>Networking:</b> Peer networking time is built into training sessions; occasionally nonprofit open-house events are held.</p> <p><b>Meeting space:</b> Offered at below-market rates for nonprofit and community board meetings, events, and gatherings.</p> <p><b>Grant research:</b> The Foundation Directory database is available at no cost for nonprofit grant research.</p> <p><b>Most popular:</b> Board and leadership development, board recruitment and orientation, fundraising. We get requests for popular sessions to be repeated and for programs to be delivered in rural areas.</p> <p><b>Services don't include:</b> One-on-one coaching, program delivery directly to specific organizations (such as to their full board), HUB staff to deliver board retreat facilitation, legal work, and back office services (such as HR, program evaluation, finance, and database support). For these, we refer to consultants and partner organizations.</p>
<b>Audience</b>	<p>Primarily nonprofit staff and board (80-90%) with volunteers and general community also attending.</p> <p>Primarily Santa Fe, Rio Arriba, Mora, and San Miguel.</p>
<b>Outreach and access</b>	<p>Program delivery is primarily in Santa Fe with some remote access available.</p> <p>A weekly electronic newsletter goes out to ~3,200 addresses and both Facebook and the SFCF website are well-utilized.</p>
<b>Partners</b>	<p>We work primarily with independent consultants for program delivery and have a formal partnership with SCORE Santa Fe specifically for the Board Orientation Program.</p> <p>There is a good deal of informal partnership with fellow service providers through information sharing and referrals. This is an area with potential for more formal collaboration around projects, service delivery, and content.</p>
<b>Evaluation</b>	Programs are assessed through participant surveys and direct/onsite feedback. Attendance numbers are readily tracked and there is a need for deeper assessment and evaluation of long-term impact. SFCF is adopting the Results-Based Accountability (RBA) method which will be utilized in the Philanthropy HUB as well.
<b>Funding</b>	The Philanthropy HUB is primarily funded through SFCF annual fundraising, with occasional program-specific sponsorship. Modest revenue is generated by program registration and meeting space fees.
<b>Budget</b>	~\$35,000/year for Philanthropy HUB program support, does not include staff, building maintenance, etc. (~\$1,500,000 for SFCF)
<b>Challenges</b>	Internal capacity which impacts rural outreach and service delivery, deep evaluation, and appropriate expansion (where to go deep, where to go broad).
<b>Opportunities</b>	Looking to local and national practitioners for effective best practices and innovation; deeper partnership and sector-focused projects and infrastructure (ongoing salary surveys, consultant directories, etc.).

<b>Needs</b>	See opportunities!
<b>Future plans</b>	Program expansion to rural areas (prioritizing our service counties which are Santa Fe, Rio Arriba, Mora, and San Miguel) as well as increasing access to Santa Fe programs through remote participation options and session recordings; developing train-the-trainer opportunities and working with partners to establish ongoing sector services including consultant directories, salary surveys, and peer connection/mentorship platforms.

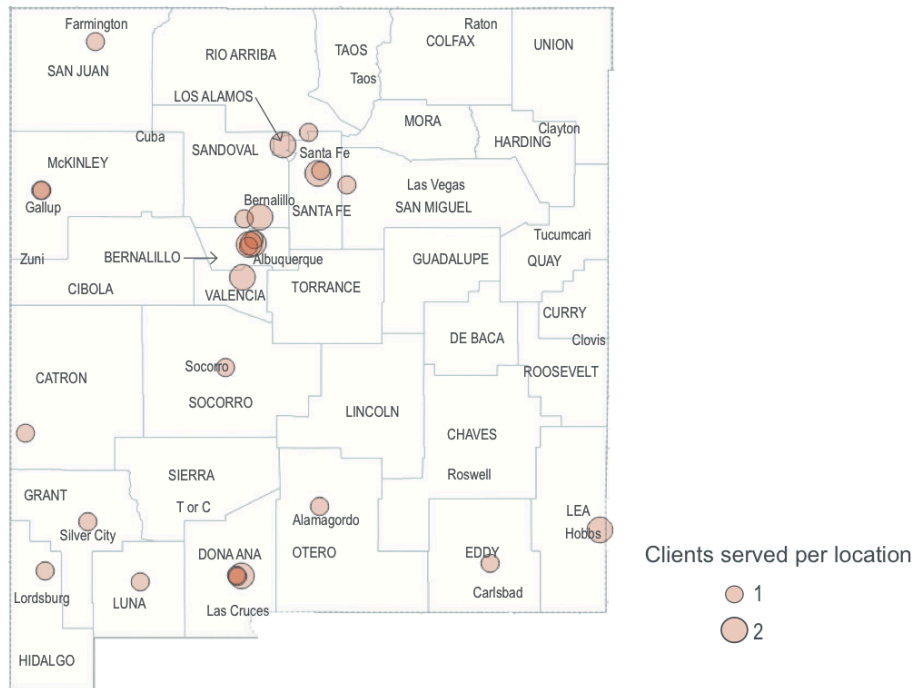


Reach data includes  
*Philanthropy HUB  
 Program Attendees  
 (2014-18) by zip code;*  
*programs include  
 capacity building,  
 training, community and  
 nonprofit dialogues.*  
 Data provided by  
 Annmarie McLaughlin in  
 an email on 9/28/18.

<b>Organization</b>	SHARE New Mexico
<b>Interviewee</b>	Wendy Wintermute, Outreach Manager
<b>Innovation</b>	Centralized information website for nonprofits, statewide resource directory, grant directory
<b>Vision and mission</b>	SHARE NM is a 'first stop' web-based location for finding vital community information for change; it is New Mexico's largest, most up-to-date and comprehensive community information website. SHARE listens, learns and works with community partners, funders and policy-makers to identify content/functionality, to share information/resources, and to support collaboration for change. For those working to improve quality of life for New Mexicans, SHARE is a trusted resource for information. Basic access is open and free. Registration is required to post and save information on programs/events and to apply for an online grant. Additional content/functionality available for a fee to partners to subscribe to resource directory or grantmaking page or sponsors to support an initiative or county page.
<b>Services</b>	<p><b>Training and technical assistance:</b> For people to access information and learn, access, use and contribute to website platforms (e.g., resource directory, grantmaking platform, community calendars). Manuals on how to: add/update service program profile, contribute to calendar, post grants, search grants. Orientation to platform is free; training for partnering organizations and subscribers (charge depends on subscription level).</p> <p><b>Information sharing:</b> Provide information for ideas on how people in NM are changing communities for the better. A page for each county includes: breaking news, health/wellbeing indicators (basic statistics provided), community events calendar, library (reports, flyers, fact sheets, toolkits, videos, powerpoints), resource lists (migrants, immigrants, emergency hotlines) and collaborative initiatives. Five social initiative pages provide statewide information on community health, food and hunger, housing and homelessness, early childhood, and returning citizens (discussions around adding an education page).</p> <p><b>Resource directory:</b> Anyone can search and export basic contact info; subscriptions provide access to all program information, including “real-time” information about resource availability, customized searches and lists, and ongoing support. Also available: apps for smart phones, androids, and iPads, as well as an API that embeds the directory on the subscriber’s webpage.</p> <p><b>Grant directory:</b> Grant-makers’ group of a dozen NM funders (Albuquerque Community Foundation, McCune, Southwest Bank, Thornburg, SFCF, et al.) created a common, online grant application and corresponding online reporting format, offered exclusively via the SHARE website. These grants require applicants to update their service profile on SHARE in order to apply. This allows grantors to have clean quick access to grantees. All grants on the platform are posted by this grant-making group.</p> <p><b>Most popular:</b> Resource directory and grant-making get high traffic; county pages get more traffic currently than initiatives pages, with recent increase in use of county calendar pages.</p> <p><b>Services don’t include:</b> SHARE is not and will never be a call-in line, but SHARE does support call-in lines with the directory.</p>
<b>Audience</b>	Statewide, nonprofits, government and private sector service providers and community change agents
<b>Outreach and access</b>	Challenge getting word out around the state. Most outreach is word-of-mouth, in-person gatherings, conferences (public health association). SHARE depends on community partners to help advertise to/engage potential users. Ngage NM has SHARE directory on website. Staff travel statewide, work with community and tribal health councils, attend regional health council meetings, work with First Nations and 5 tribal health councils, attend tribal health regional meetings. Work with existing/emerging regional and statewide networks to mitigate challenge of statewide visibility. Interested in partnering with other nonprofit support organizations to amplify statewide outreach.
<b>Partners</b>	Community health councils, community health workers, county health/human service agencies, United Ways, 211s, The Grants Collective.
<b>Evaluation</b>	Google analytics tells us how many people come to the site, how many service profile updates were made, and how many grant proposals were submitted. Focus group held to gather data on redesigning the SHARE website in 2017; much anecdotal data: SHARE collects feedback whenever and however people provide it. Count number of geographic locations visited, 62 partners visited statewide in the last year.
<b>Funding</b>	Funded by a number of NM funders, including PNM, McCune, Nusenda, Sandia National Labs, et al. W.K. Kellogg Foundation funding for the last 5 years, which helped rebuild the website. Contracts with Presbyterian Health Services, UNM Office for Community Health, Santa Fe County. The new business plan diversifies funding with a goal of 1/3 grants, 1/3 subscriptions for services, 1/3 contracts.
<b>Budget</b>	\$200,000-\$250,000

<b>Challenges</b>	How to build statewide infrastructure and achieve statewide reach in a state that is large in area, small and dispersed in population. This has required much effort, creative thinking and partnering/collaborating with community, regional and statewide organizations and initiatives. How to bridge siloes, be both broad in reach and focused in efforts, finding our niche, which is to provide information about what's happening in communities across the state. It's sometimes a challenge to find people who want to partner, but SHARE goes where the doors are open. Challenge to learn how to use new tools, technology in particular, and what to do where there is no internet. Funding is a challenge, specifically infrastructure. Collaboration costs money, websites are expensive. Every nonprofit and public agency say they want a resource directory, and there are hundreds of resource directories being created across the state. How can NM share one resource directory database? SHARE's desire is to help build and contribute to an integrated, unduplicated, statewide information infrastructure.
<b>Opportunities</b>	There is a real and growing movement toward collaboration; funders are collaborating (i.e. Educate to Elevate Grant, the Zone Grant); people are understanding the potential of web-based, new tools are available, and are learning how to best use the new technology.
<b>Needs</b>	Communication, marketing and technology, web-based tools and applications to provide flexibility, timely response to changes, content control, access by and interactivity with SHARE's community of users.
<b>Future plans</b>	SHARE is housed with the public policy organization New Mexico First; the two organizations are aligning systems/activities for greater efficiency/impact. The program is exploring expressed interest in providing information about education, tribal resources, nonprofit resources, and civic engagement.

## SHARE NM Reach

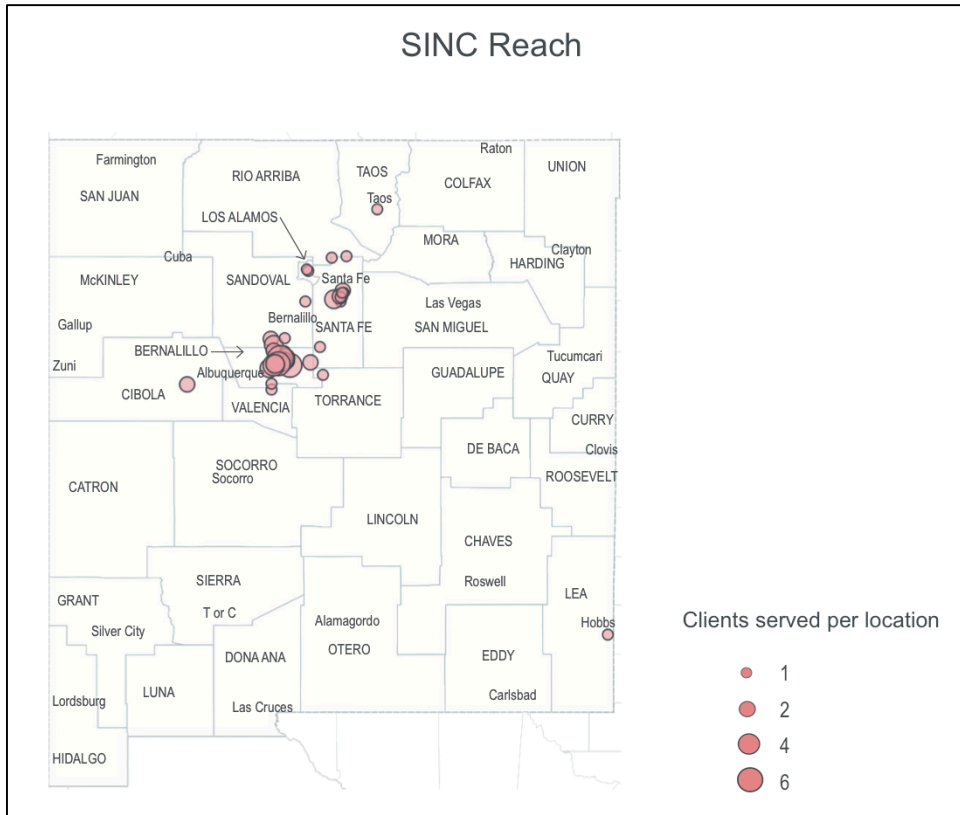


Reach data includes  
*major partners as of  
 Oct, 16 2019 by zip code.*  
 Data provided by Wendy  
 Wintermute in an email  
 on 10/16/18.

<b>Organization</b>	SINC (nonprofit capacity support division of The Rio Grande Community Development Corporation)
<b>Interviewee</b>	Paul Aragon, Operations Specialist
<b>Innovation</b>	Fiscal sponsorship, individualized support and consultation
<b>Vision and mission</b>	Where nonprofit innovation and impact combine to make great things happen. Where purpose meets doing. And where Social Impact (SI) and Nonprofit Community (NC) thrive. SINC contributes to creating a stronger community through collaboration by empowering community members to develop social impact projects that create collective solutions to common social problems, SINC provides services to each project to accelerate their impact and help them better deliver value back to New Mexico.
<b>Services</b>	<p><b>Training and technical assistance:</b> (Available to SINC fiscally sponsored nonprofits) includes board and leadership development, strategic planning, collaboration, fundraising/grant writing, communications/marketing, human resources, technology, accounting and legal services. Generally, do not offer training workshops but refer to partner organizations that offer existing trainings in the community (i.e CNPE, Hispano Chamber of Commerce, Catholic Charities, SCORE and SVEDC (i.e. business incubation)). Teach Starting a Nonprofit workshop as it is an area with a lack of resources. Work mostly in a 1-on-1 individual needs-based approach; also work to provide mentors and experts in sector to help empower the projects.</p> <p><b>Fiscal sponsorship:</b> Currently, fiscally sponsoring 27 nonprofit ‘projects’ in NM (2 in Santa Fe, 1 in Las Cruces, 1 in Hobbs, and are working with rural groups through partnership with Co-op Catalyst). SINC’s fiscal sponsorship allows projects to focus on their unique mission, and not worry about financial and legal compliance.</p> <p><b>Consultants:</b> Most projects cannot afford consultant fees, so SINC works with nonprofit professional volunteers. If a project’s needs surpass these supports, SINC refers to consultants.</p> <p><b>Networking/collaboration:</b> SINC manages Impact and Coffee (3x/month networking event for anyone looking to engage with the nonprofit sector in Abq), format is 2 speakers/week, 6-minute talk about organization, 5-minute Q and A, 10-minute networking break between presenters.</p> <p><b>Most popular:</b> Funding supports (i.e. connections to funders, grant sourcing, grant applications, grant writing, grant narratives, effective storytelling), technology assistance, needs and popularity vary by projects’ level of engagement, size and needs.</p> <p><b>Services don’t include:</b> Direct funding, specific trainings focused on certain topics, graphic design, branding and communication design.</p>
<b>Audience</b>	Nonprofit entrepreneurs in the ideation, startup to midsize phase of implementing social ideas and/or passion projects.
<b>Outreach and access</b>	<p>Collaborate and network widely to increase visibility and get referrals (i.e. Impact and Coffee Forum, CNPE, capacity building and nonprofit-centric events). Relationship with business incubators also leads to referrals (i.e. Westt).</p> <p>No specific geographic restriction, though work is easier face-to-face. Work with smaller nonprofits statewide that do not have infrastructure. Coop Catalyst of NM is focused on agriculture and rural areas; focused in Zuni, Navajo and southern NM.</p> <p>Application process is extensive (includes: business plan, funding possibilities, market research, uniqueness of service, service goals, clear articulation of best people to provide service, bandwidth assessment, potential collaborators assessment). Application is reviewed internally and then goes to SINC board for approval.</p>
<b>Partners</b>	Nonprofit division partners: The Grants Collective, CNPE, Daly Consulting, Impact and Coffee Forum Leadership Team peers (Global Ties, UNM Department of Community Engagement, La Red) and funders (Albuquerque Community Foundation and PNM).
<b>Evaluation</b>	<p>Developed as fiscal sponsor in response to discussions with national nonprofit sector.</p> <p>Track attendance at nonprofit startup workshops (4x/year, 30-40 attendees/year).</p> <p>Working with Pivot Evaluation to create a new strategy for the measurable impact of RG CDC now that there are 2 divisions. A new strategy needs to be assessed to represent the new structure of organization.</p>
<b>Funding</b>	Multiple funding streams including: fee-for-service (fiscal sponsorship fee), grants (WKKF and McCune), funding for Impact and Coffee Forum from PNM grant as well as a small portion from individual/board donations.
<b>Budget</b>	\$350,000 for SINC (\$2,600,000 as an organization)
<b>Challenges</b>	Funding, securing resources to do the work desired in relation to internal capacity to give projects everything they request.



<b>Opportunities</b>	Potential national funding to bring external money into Abq for community development, job growth, neighborhood development. A lot more collaborative programs.
<b>Needs</b>	Funding and more partnerships. Opportunities to collaborate with everyone in the sector. Exploring how RG CDC grows in a way that continues to empower the community. Understanding how to bring good, solid growth that creates jobs and brings families out of poverty.
<b>Future plans</b>	Continuing to bring the sector together.



Reach data includes *zip codes served by current (2018) SINC Projects and Nonprofit Startup Workshop Attendees by zip code*. Data provided by Paul Aragon in an email on 10/4/18.

<b>Organization</b>	UNM Evaluation Lab
<b>Interviewee</b>	Melissa Binder, Director
<b>Innovation</b>	Academia-community collaboration, peer learning
<b>Tools</b>	Graduate Student training and Summer Evaluation Institute Learning Community
<b>Vision and mission</b>	UNM Evaluation Lab works to build evaluation capacity in nonprofits and government agencies throughout New Mexico, and to facilitate the development of sound state policies around evaluation in New Mexico. Nonprofits must be able to assess their own effectiveness to satisfy funders and to improve service to clients, and often lack expertise in program evaluation. The UNM Evaluation Lab harnesses the analytical skills of academia for the service of nonprofits through student and community training programs and collaborative program evaluation projects.
<b>Services</b>	<p><b>Technical assistance and training:</b> Evaluation and evaluation capacity building, student training model where students collaborate with a nonprofit to develop evaluation activities and build internal nonprofit evaluation capacity, work with 5 nonprofits/year.</p> <p><b>Annual Workshop:</b> Held in Abq for nonprofits to come together and learn about evaluation by learning about nonprofits' evaluation projects. A showcase of all that was learned through the evaluation labs that year, participants come to see what's possible (i.e. collect qualitative and quantitative data, nonprofits learn that they can measure anything, nonprofits see how other nonprofits measure what they really care about).</p> <p><b>Summer Institute:</b> Condenses Graduate program evaluation course into a one-week training on all aspects of evaluation, including reviewing the evidence base, creating logic models, and collecting and analyzing quantitative and qualitative data.</p> <p><b>Evaluation peer learning community:</b> Offered for group that attended the summer institute, modeled after Project ECHO Learning Community (web-based, train-the-trainer, 10-minute didactic learning activity, live nonprofit case studies), starting this fall, 6 sessions, offered every other week, to talk about outcomes, how to measure outcomes, and what are reasonable outcomes. In-person summer institute instigated peer learning and built excitement and commitment to participate virtually in a learning community cohort.</p> <p><b>Most popular:</b> How to do outcomes evaluation and how to measure impact?</p> <p><b>Services don't include:</b> External evaluators, requests to help nonprofits manage data, nonprofits want to measure their outcomes, they are collecting data and they want to figure out how to have it on a dashboard.</p>
<b>Audience</b>	UNM Evaluation Lab came out of conversations with nonprofits (La Red, PB&J, Enlace Comunitario, Las Cumbres and CLNkids) who wanted an evaluation lab. Working together, group developed the student training model based on past experiences with student interns. UNM Evaluation Lab has since paired students with nonprofits who have come forward, or with graduate students connected to a nonprofit they refer for the Evaluation Lab. UNM Evaluation Lab makes a 5-year commitment to nonprofits receiving student-model evaluation support, new nonprofits are currently identified through an informal network.
<b>Outreach and access</b>	Statewide outreach for the summer evaluation institute is done using CNPE listing to search social justice nonprofits, 900 nonprofits were pulled, of which 600 emails were accessible and contacted. Summer institute model was developed so rural nonprofits could attend by providing the entire workshop in one week. All activities are targeted to social justice nonprofits and government agencies. 65 individuals from 17 nonprofits across the state attended the first summer evaluation institute.
<b>Partners</b>	3 sets of partners, 1) Student training model partners; small number of organizations serve on Advisory Council, helps respond to needs, is developing internal evaluation systems, collaborative model, community-based participatory approach, 2) Local funders enable crucial, labor intensive relationship building, 3) CNPE and The Grants Collective, collaborating on a project with other organizations doing the same things but in different areas. UNM Evaluation Lab as speaker in The Grants Collective talent academy. Complementary work with CNPE (access to nonprofits and platform for marketing). Grant opportunities foster partnerships (i.e. PNM grant to solve the same problem of how to serve nonprofits statewide). Funding to go to different places in the state will enable nonprofit support organizations to learn together how to work together to get there.
<b>Evaluation</b>	End of year debrief, part satisfaction and part evaluation capacity assessment. Found that organizations' attitudes toward evaluation changed and evaluation has become more of a priority. Found that UNM Evaluation Lab helps develop evaluation skills and an internal culture that



# Survey Data

Detailed survey responses are provided for each question for nonprofits and funders. Responses are also presented by the geography (urban, rural) and size (based on annual budget) of organizations.

## New Mexico Nonprofit Landscape Survey – Raw Data

Urban and Rural designations for nonprofit survey respondents were determined based on the zip code of their primary office location as provided in the survey. Using publically available data from the American Community Survey, we identified the percent of each zip code that was in a rural area. Zip codes that were 20% or more rural were classified as rural and the remaining zip codes were classified as urban. We also examined data using 10% and 50% cut-points and the results did not differ substantially.

	Nonprofit	
	Frequency	% of Total
Urban	188	78%
Rural	52	22%
Unknown	68	
Total	308	

	Nonprofit		Funder	
	Frequency	% of Total	Frequency	% of Total
Small	60	26%	6	26%
Medium	99	43%	6	26%
Large	71	31%	11	48%
Unknown	78		12	
Total	308		35	

What counties do you primarily serve in New Mexico?

	Nonprofit (N = 239)	Funder (N = 24)
All	25%	29%
Bernalillo	35%	38%
Catron	3%	8%
Chavez	2%	4%
Cibola	2%	4%
Colfax	5%	0%
Curry	2%	0%
De Baca	2%	0%
Dona Ana	10%	13%
Eddy	3%	4%
Grant	8%	17%
Guadalupe	2%	0%
Harding	2%	0%
Hidalgo	3%	13%
Lea	4%	4%
Lincoln	2%	4%
Los Alamos	10%	17%
Luna	5%	13%
McKinley	7%	13%
Mora	6%	8%
Otero	3%	4%
Quay	2%	0%
Rio Arriba	15%	13%
Roosevelt	2%	0%
Sandoval	18%	17%
San Juan	8%	13%
San Miguel	7%	13%
Santa Fe	25%	29%

	Nonprofit (N = 239)	Funder (N = 24)
Sierra	4%	0%
Socorro	5%	0%
Taos	13%	13%
Torrance	6%	8%
Union	2%	0%
Valencia	10%	13%

How well do nonprofits connect with each other to share strategies and issues related to nonprofit organizations in general?

	Nonprofit (N = 305)	Funder (N = 35)
Not very well	26%	34%
Somewhat well	56%	37%
Very Well	12%	6%
Not sure	6%	23%

	Nonprofit	
	Urban (N = 188)	Rural (N = 52)
Not very well	28%	31%
Somewhat well	56%	56%
Very Well	12%	8%
Not sure	4%	6%

	Nonprofit			Funder		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Not very well	28%	27%	30%	50%	50%	36%
Somewhat well	57%	59%	55%	33%	50%	36%
Very Well	5%	11%	14%	17%	0%	0%
Not sure	10%	3%	1%	0%	0%	28%

How well is advocacy being done for the nonprofit sector as a whole in New Mexico? This means representing/providing a voice for a large segment of the nonprofit sector in policy settings.

	Nonprofit (N = 282)	Funder (N = 32)
Not very well	39%	53%
Somewhat well	35%	19%
Very Well	5%	6%
Not sure	21%	22%

	Nonprofit	
	Urban (N = 188)	Rural (N = 52)
Not very well	45%	37%
Somewhat well	36%	27%
Very Well	4%	8%
Not sure	15%	29%

	Nonprofit			Funder		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Not very well	28%	46%	49%	67%	100%	55%
Somewhat well	35%	32%	37%	33%	0%	18%
Very Well	5%	5%	4%	0%	0%	0%
Not sure	32%	17%	10%	0%	0%	27%

How easy or hard is it for your organization to get the data and research you need? This could include data about the populations you serve or about best practices, for example.

	Nonprofit (N = 270)	Funder (N = 28)
Very hard	9%	7%
Somewhat hard	40%	36%
Somewhat easy	34%	25%
Very easy	11%	0%
Not sure	6%	32%

	Nonprofit	
	Urban (N = 188)	Rural (N = 52)
Very hard	9%	12%
Somewhat hard	41%	40%
Somewhat easy	34%	35%
Very easy	12%	8%
Not sure	4%	6%

	Nonprofit			Funder		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Very hard	15%	6%	7%	17%	17%	0%
Somewhat hard	33%	43%	46%	17%	50%	55%
Somewhat easy	32%	37%	31%	50%	33%	18%
Very easy	12%	11%	11%	0%	0%	0%
Not sure	8%	2%	4%	17%	0%	27%

How well are your organization's training and technical assistance needs currently being met?

	Nonprofit (N = 258)
Not very well	19%
Somewhat well	47%
Very Well	28%
Not sure	5%

	Nonprofit	
	Urban (N = 188)	Rural (N = 52)
Not very well	18%	27%
Somewhat well	46%	48%
Very Well	32%	19%
Not sure	4%	6%

	Nonprofit		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)
Not very well	30%	17%	13%
Somewhat well	42%	48%	49%
Very Well	22%	32%	32%
Not sure	7%	2%	6%

Which of these are challenges to accessing training and technical assistance?

	Nonprofit
<b>Cost (N = 233)</b>	
Not a challenge	10%
Somewhat of a challenge	38%
A big challenge	48%
Not sure	4%
<b>Too many options (N = 218)</b>	
Not a challenge	64%
Somewhat of a challenge	19%
A big challenge	3%
Not sure	14%
<b>Not enough options (N = 224)</b>	
Not a challenge	32%
Somewhat of a challenge	32%
A big challenge	23%
Not sure	13%
<b>Not the right options (N = 224)</b>	
Not a challenge	19%
Somewhat of a challenge	46%
A big challenge	24%
Not sure	12%
<b>Awareness of options (N = 227)</b>	
Not a challenge	20%
Somewhat of a challenge	41%
A big challenge	35%
Not sure	4%
<b>Staff time (N = 230)</b>	
Not a challenge	8%
Somewhat of a challenge	30%
A big challenge	60%
Not sure	2%
<b>Geographic location (N = 229)</b>	
Not a challenge	27%
Somewhat of a challenge	31%
A big challenge	38%
Not sure	4%
<b>Cultural appropriateness (N = 223)</b>	
Not a challenge	30%
Somewhat of a challenge	35%
A big challenge	22%
Not sure	13%



	Nonprofit	
	Urban	Rural
<b>Cost</b>	<b>(N = 176)</b>	<b>(N = 48)</b>
Not a challenge	9%	10%
Somewhat of a challenge	42%	27%
A big challenge	45%	58%
Not sure	4%	4%
<b>Too many options</b>	<b>(N = 164)</b>	<b>(N = 47)</b>
Not a challenge	68%	47%
Somewhat of a challenge	16%	28%
A big challenge	4%	2%
Not sure	12%	23%
<b>Not enough options</b>	<b>(N = 167)</b>	<b>(N = 50)</b>
Not a challenge	29%	38%
Somewhat of a challenge	34%	28%
A big challenge	26%	14%
Not sure	11%	20%
<b>Not the right options</b>	<b>(N = 168)</b>	<b>(N = 49)</b>
Not a challenge	16%	27%
Somewhat of a challenge	46%	41%
A big challenge	27%	16%
Not sure	11%	16%
<b>Awareness of options</b>	<b>(N = 171)</b>	<b>(N = 49)</b>
Not a challenge	18%	22%
Somewhat of a challenge	41%	43%
A big challenge	36%	35%
Not sure	5%	0%
<b>Staff time</b>	<b>(N = 174)</b>	<b>(N = 50)</b>
Not a challenge	8%	2%
Somewhat of a challenge	29%	34%
A big challenge	61%	60%
Not sure	2%	4%
<b>Geographic location</b>	<b>(N = 171)</b>	<b>(N = 50)</b>
Not a challenge	32%	10%
Somewhat of a challenge	32%	28%
A big challenge	32%	58%
Not sure	5%	4%
<b>Cultural appropriateness</b>	<b>(N = 168)</b>	<b>(N = 48)</b>
Not a challenge	30%	29%
Somewhat of a challenge	36%	33%
A big challenge	24%	15%
Not sure	11%	23%

	Nonprofit		
	Small	Medium	Large
<b>Cost</b>	<b>(N = 54)</b>	<b>(N = 95)</b>	<b>(N = 68)</b>
Not a challenge	2%	14%	10%
Somewhat of a challenge	35%	37%	43%
A big challenge	54%	47%	46%
Not sure	9%	2%	1%
<b>Too many options</b>	<b>(N = 48)</b>	<b>(N = 89)</b>	<b>(N = 67)</b>
Not a challenge	50%	64%	76%
Somewhat of a challenge	23%	18%	15%
A big challenge	2%	3%	4%
Not sure	25%	15%	4%
<b>Not enough options</b>	<b>(N = 51)</b>	<b>(N = 90)</b>	<b>(N = 68)</b>
Not a challenge	27%	34%	34%
Somewhat of a challenge	25%	30%	38%
A big challenge	22%	26%	21%
Not sure	25%	10%	7%
<b>Not the right options</b>	<b>(N = 50)</b>	<b>(N = 91)</b>	<b>(N = 69)</b>
Not a challenge	12%	24%	17%
Somewhat of a challenge	46%	40%	52%
A big challenge	24%	23%	25%
Not sure	18%	13%	6%
<b>Awareness of options</b>	<b>(N = 52)</b>	<b>(N = 92)</b>	<b>(N = 69)</b>
Not a challenge	13%	20%	25%
Somewhat of a challenge	46%	43%	35%
A big challenge	35%	32%	39%
Not sure	6%	5%	1%
<b>Staff time</b>	<b>(N = 53)</b>	<b>(N = 94)</b>	<b>(N = 70)</b>
Not a challenge	2%	7%	10%
Somewhat of a challenge	30%	30%	33%
A big challenge	60%	62%	57%
Not sure	8%	1%	0%
<b>Geographic location</b>	<b>(N = 52)</b>	<b>(N = 94)</b>	<b>(N = 68)</b>
Not a challenge	27%	24%	29%
Somewhat of a challenge	23%	30%	41%
A big challenge	42%	41%	28%
Not sure	8%	4%	1%
<b>Cultural appropriateness</b>	<b>(N = 50)</b>	<b>(N = 91)</b>	<b>(N = 68)</b>
Not a challenge	36%	25%	31%
Somewhat of a challenge	28%	41%	35%
A big challenge	18%	21%	24%
Not sure	18%	13%	10%

Which of the following types of funds does your organization currently have to build your capacity?

Check all that apply	Nonprofit (N = 244)
General operating funds	69%
Program grants that include funds for capacity building	39%
Grants specifically for capacity building	20%
None of these	18%
Other	6%

Check all that apply	Nonprofit	
	Urban (N = 185)	Rural (N = 52)
General operating funds	71%	60%
Program grants that include funds for capacity building	40%	35%
Grants specifically for capacity building	20%	17%
None of these	16%	29%
Other	7%	4%

Check all that apply	Nonprofit		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)
General operating funds	40%	77%	83%
Program grants that include funds for capacity building	28%	38%	45%
Grants specifically for capacity building	2%	24%	28%
None of these	40%	11%	11%
Other	7%	4%	10%

About how much of your organization's annual budget is multi-year funding?

	Nonprofit (N = 242)	Funder (N = 24)
None	34%	54%
Less than half	33%	21%
About half	14%	8%
More than half	8%	8%
Almost all	5%	4%
Not sure	5%	4%

	Nonprofit	
	Urban (N = 185)	Rural (N = 52)
None	32%	42%
Less than half	34%	31%
About half	17%	8%
More than half	9%	6%
Almost all	3%	8%
Not sure	5%	6%

	Nonprofit			Funder		
	Small (N = 60)	Medium (N = 98)	Large (N = 71)	Small (N = 6)	Medium (N = 6)	Large (N = 11)
None	62%	33%	15%	83%	67%	36%
Less than half	20%	33%	48%	17%	0%	36%
About half	8%	17%	18%	0%	17%	9%
More than half	2%	6%	15%	0%	0%	18%
Almost all	5%	7%	0%	0%	17%	0%
Not sure	3%	4%	3%	0%	0%	0%

## About your Organization

Which of these communities do you primarily serve, if any?

Check all that apply	Nonprofit (N = 216)	Funder (N = 21)
Rural	62%	76%
Frontier	21%	33%
Tribal	32%	43%
None of the above	33%	24%

Check all that apply	Nonprofit	
	Urban (N = 161)	Rural (N = 51)
Rural	57%	82%
Frontier	19%	29%
Tribal	36%	24%
None of the above	42%	8%

Check all that apply	Nonprofit			Funder		
	Small (N = 51)	Medium (N = 93)	Large (N = 62)	Small (N = 5)	Medium (N = 6)	Large (N = 9)
Rural	76%	66%	45%	80%	100%	56%
Frontier	31%	16%	23%	40%	50%	22%
Tribal	25%	32%	39%	20%	67%	44%
None of the above	20%	32%	47%	20%	0%	44%

Which best describes your organization's 2018 annual budget?

	Nonprofit (N = 237)	Funder (N = 24)
Less than \$5,000	4%	0%
\$5,000 to \$24,999	6%	4%
\$25,000 to \$49,999	5%	0%
\$50,000 to \$99,999	11%	21%
\$100,000 to \$249,999	12%	4%
\$250,000 to \$499,999	16%	8%
\$500,000 to \$999,999	14%	13%
\$1,000,000 or more	30%	46%
Not sure	3%	4%

	Nonprofit	
	Urban (N = 184)	Rural (N = 52)
Less than \$5,000	3%	6%
\$5,000 to \$24,999	2%	19%
\$25,000 to \$49,999	5%	6%
\$50,000 to \$99,999	8%	19%
\$100,000 to \$249,999	10%	19%
\$250,000 to \$499,999	16%	14%
\$500,000 to \$999,999	15%	10%
\$1,000,000 or more	36%	6%
Not sure	3%	2%

	Nonprofit			Funder		
	Small (N = 60)	Medium (N = 99)	Large (N = 71)	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Less than \$5,000	15%	0%	0%	0%	0%	0%
\$5,000 to \$24,999	23%	0%	0%	17%	0%	0%
\$25,000 to \$49,999	20%	0%	0%	0%	0%	0%
\$50,000 to \$99,999	42%	0%	0%	83%	0%	0%
\$100,000 to \$249,999	0%	29%	0%	0%	17%	0%
\$250,000 to \$499,999	0%	37%	0%	0%	33%	0%
\$500,000 to \$999,999	0%	33%	0%	0%	50%	0%
\$1,000,000 or more	0%	0%	100%	0%	0%	100%
Not sure	0%	0%	0%	0%	0%	0%

Which of the following nonprofit infrastructure components is your organization supporting this fiscal year whether it be through grant-making, direct support, or in-kind contributions?

Check all that apply	Funder (N = 24)
Networking and collaboration	75%
Advocacy for nonprofit sector	25%
Data and research	33%
Training and technical assistance	58%
None	13%
Other	17%

Check all that apply	Funder		
	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Networking and collaboration	50%	67%	91%
Advocacy for nonprofit sector	0%	50%	18%
Data and research	0%	33%	45%
Training and technical assistance	50%	50%	64%
None	17%	17%	9%
Other	17%	17%	18%

How much does your organization coordinate funds and strategies with other funders who support the nonprofit infrastructure?

	Funder (N = 24)
Not at all	25%
Somewhat	46%
A great deal	25%
Not sure	4%

	Funder		
	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Not at all	33%	33%	18%
Somewhat	33%	33%	64%
A great deal	33%	33%	9%
Not sure	0%	0%	9%

Supporting the nonprofit infrastructure is not the sole responsibility of private funders. Which of the following have you seen also support the nonprofit infrastructure in New Mexico?

Check all that apply	Funder (N = 24)
State government	25%
Local government	46%
Tribal government	17%
Colleges or universities	50%
Small business development centers	33%
Private businesses	38%
Individual charitable donors	63%
None	8%
Other	4%

Check all that apply	Funder		
	Small (N = 5)	Medium (N = 6)	Large (N = 11)
State government	20%	17%	27%
Local government	80%	17%	45%
Tribal government	0%	33%	9%
Colleges or universities	40%	33%	64%
Small business development centers	40%	50%	27%
Private businesses	40%	33%	45%
Individual charitable donors	80%	50%	55%
None	0%	17%	9%
Other	0%	0%	9%

There is a national movement to encourage funders to pool funds to help support the nonprofit infrastructure. How interested is your organization in participating in conversations about what a pooled funding model could look like in New Mexico?

	Funder (N = 24)
Not at all interested	4%
Somewhat interested	46%
Very interested	42%
Not sure	8%

	Funder		
	Small (N = 6)	Medium (N = 6)	Large (N = 11)
Not at all interested	17%	0%	0%
Somewhat interested	33%	33%	64%
Very interested	33%	67%	36%
Not sure	17%	0%	0%

Which of the following ways do you currently support the nonprofit infrastructure?

Check all that apply	Funder (N = 22)
General operating funds for nonprofits	55%
Program grants that include funds for infrastructure components (like training)	64%
Grants specifically for infrastructure components	41%
Direct support of infrastructure components	36%
None	5%
Other	32%

Check all that apply	Funder		
	Small (N = 6)	Medium (N = 5)	Large (N = 11)
General operating funds for nonprofits	50%	60%	55%
Program grants that include funds for infrastructure components (like training)	33%	60%	82%
Grants specifically for infrastructure components	33%	40%	45%
Direct support of infrastructure components	33%	40%	36%
None	17%	0%	0%
Other	17%	40%	36%