

SANTA FE
COMMUNITY
FOUNDATION



Aligning Our Work for Equity and Results

2018

New Strategic Framework for the Santa Fe Community Foundation:
An Executive Summary

OUR PLACE.
OUR PEOPLE.
OUR POWER TOGETHER.

Introduction

Background

Since its establishment in 1981, the Santa Fe Community Foundation (SFCF) has been devoted to building healthy and vital communities in Santa Fe and the northern New Mexico region.

Over the years, we have been fortunate to experience remarkable growth. In just the past decade, the Foundation's assets have more than doubled from \$30M in 2007 to over \$80M today with similar growth in our total grantmaking from \$3.2M in 2007 to \$7.4M in 2017. This growth was accompanied by an increasing focus on community leadership with our evolving role as an anchor institution, a convener, and a thought leader. Since 2010, we have served as a home for more than 20 different community initiatives and funder-led programs. Through these diverse roles, we have always focused on serving marginalized and disenfranchised populations in our communities.

How do we explain and celebrate the growth of our organization if the community that we serve is falling farther and farther behind?

Yet, as we reflect on our history of fast-paced growth, we are also confronted with the persistent challenges and growing disparities our region faces. Today, New Mexico has the highest rate of children under 18 living in poverty in the country at 30%, or nearly 1 in 3 children in our state are living in poverty. Racial and economic disparities and tensions are widespread and growing in our region and nationally.

These challenges prompt us to question our role in the community as a community foundation and how we respond and are part of the solution. How do we explain and celebrate the growth of our organization if the community that we serve is falling farther and farther behind? Is our work making a meaningful impact in

improving the lives of the people we serve? To this end, revisiting our strategic framework was undertaken as a journey and response to these types of questions and challenges.

Redefining Our Approach to Community Philanthropy

Throughout 2017, the SFCF Board and staff embarked on a year-long process of understanding and redefining our approach to philanthropy, service, and leadership as a community foundation. The development of this strategic framework was an iterative process in nature.

A couple of important decisions by the SFCF Board of Directors regarding the Foundation's path forward set the stage early in the strategic framework development process. *First*, was the decision to be **proactive** in pursuing a social change agenda, a step forward from a more responsive philanthropic approach the Foundation used in the past. *Second*, the Foundation formally acknowledged its **statewide role**, especially in areas where engaging in policy and strategic funder collaboration are critical for broader systemic change. And *third*, the Board agreed that the Foundation should actively invest in **policy advocacy** to affect long-term systemic change with scale and sustainability.

Additionally, we studied and learned from our own work over the past years, reports from community partners, and initiatives from exemplary peer foundations around the country. We also engaged in **11 community conversations** to listen to our local nonprofits, philanthropic partners, and community members' thoughts about SFCF's role in addressing inequities in our community. We were inspired by the work of some of the national private and peer community foundations including the W.K. Kellogg Foundation, Annie E. Casey Foundation and San Francisco Foundation, as well as initiatives supported by our own foundation including the Opportunity Santa Fe: Birth to Career and New Mexico Health Equity Partnership in our learning process.

From this work, three pillars of our new strategic framework emerged:

1. **Equity:** Our Social Change Agenda
2. **Results:** Our Impact and Performance Accountability, and
3. **Alignment:** Our Work Aligned for Purpose

See Exhibit 1 in Appendix for visual overview of the new strategic framework.

The years ahead will be important as we lean into this new framework. We know that it will be challenging, and we will likely make some mistakes. But, we are ready to embrace this path and invite our partners and community to join us on the journey – aligning our work for equity and results.

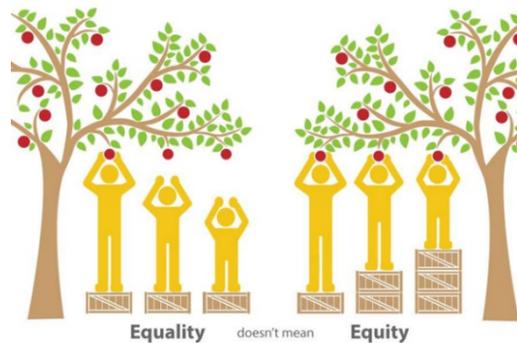
1. EQUITY: Our Social Change Agenda

The 11 community conversations we conducted revealed that with widening economic and social disparities, we risk losing what we value and love the most about our community – the diversity of people, perspective, and culture that is the source of our strength. With a heightened sense of urgency to address issues of inequities in our communities, the Santa Fe Community Foundation Board and staff have embraced equity as our new overarching social change agenda.

Our focus on equity is not a major change, rather an intentional doubling down on our commitment to invest our resources in addressing inequities in our community. Without an intentional and committed focus on equity, too many people and communities will continue to fall behind, facing barriers to the very opportunities to advance. Equity informs how we move toward inclusion, belonging, and healing as a community

Our Definition of Equity

We have adopted a slightly modified version of [Policy Link](#)'s definition of equity - ***just and fair inclusion into a society in which all can participate, prosper, reach their full potential, and contribute.*** We note that the ability to contribute was an important aspect of equity recognized by the participants in the community conversations.



Our Equity Framework

Three themes will guide our work and deployment of resources based on equity - **People, Place and Power**, or what we call **Three P's**:

- **People** – Identify, focus on, and engage populations most affected by inequities
- **Place** - Invest in and build on strength and cultural and social assets of the community.
- **Power** - Invest in power to lift community voice and leadership as a driver for change.

*How We Define Equity -
Just and fair inclusion into a
society in which all can participate,
prosper, reach their full potential
and contribute.*

Systemic Change – We want our investment in equity to work toward lasting change by understanding root causes, key gaps, and how issues are inter-connected. Policy advocacy along with cross-sector collaboration will be important levers in driving system change.

We cannot be effective as a funder for equity in our outward-facing work without building capacity as an equity-practitioner ourselves internally. The community conversations and our staff raised many questions around the Foundation's own institutional values and practices related to equity. Our privileged position as a funder affects the power dynamics in our relationships with grantees and communities. In order to "walk the talk," we are also committing to look inward. We will focus on:

We cannot be effective as a funder for equity in our outward-facing work without building capacity as an equity-practitioner ourselves internally.

- **Partnership**
 - Strengthen partnerships with community-based, grassroots organizations, nonprofits, and peer foundations who are aligned with equity goals for greater impact and shared learning.
- **Practice**
 - Build organizational capacity and institutional accountability for equity practices and results – internally and for our partners.
 - Collect and use data to identify inequities, inform decisions, and track progress.
- **Purposeful Alignment**
 - Ensure intentional coordination and alignment of all resources across the Foundation’s work to create impact with a focus on equity.
 - Ensure that our organizational policies and decisions reflect equity value.

Santa Fe Community Foundation Equity Framework

Equity as a key value affecting all aspects of our work – internally and externally.



2. RESULTS: Our Impact and Performance Accountability

How do we know that our work is making an impact for our communities and people?

In order to understand our impact, we have to define the results and hold ourselves accountable for the contributions we want to make. Focusing on results is a continuous inquiry into our work - learning what's working and what's not so that we can adapt and improve the effectiveness of our work for greater impact.

Equitable Access to Opportunities

The Foundation's new strategy focuses on ensuring that all people in our communities have **equitable access to opportunities** to thrive, prosper, and contribute. We believe that in order to serve the whole community well, we need to target our efforts on improving the lives of those that are most affected by the social, racial and economic inequities, and that may also face structural barriers in achieving optimal outcomes.

With limited resources, we need to also align our efforts with our partners so that our collective efforts are working toward achieving greater outcomes. We must also focus our investments where we can make the most significant contributions.

Our Areas of Impact

SFCF's investments primarily focus on five **Areas of Impact** that guide the deployment of resources and that are supported by endowments and donors:

- Educational Success and Career Pathways
- Economic Security & Opportunities
- Sustainable Agriculture & Stewardship of Resources
- Health and Wellbeing
- Cultural Vibrancy

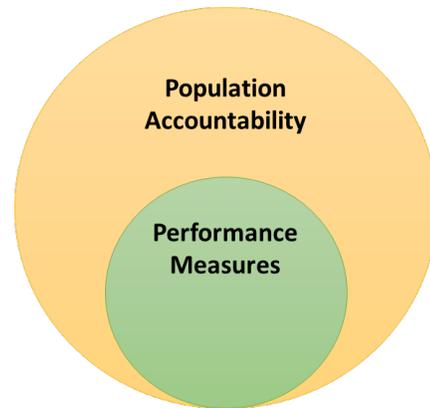


We recognize that these **Areas of Impact** are deeply interconnected and that we need to consider the root causes of community issues and the solutions in a holistic way to positively affect people's lives and communities.

Results-Based Accountability (RBA) Framework

We have adopted Results-Based Accountability (RBA) to ensure we make measurable progress on our goals to improve equitable access to opportunities in our communities. RBA is a simple, but disciplined, way of thinking and acting for organizations and communities to improve the lives of children, youth and families. Using a data-driven process, RBA starts with the “ends” and works backward towards “means” to develop concrete action plans to “turn the curve” on key outcome goals.

RBA clearly distinguishes broad community level outcomes (“population accountability”) from those of specific organizations or programs (“performance measures”). This allows community partners to work toward community-wide shared goals while recognizing performance accountability for their own contributions and actions to improving outcomes. Many of our community funding partners, as well as Opportunity Santa Fe: Birth to Career, a collective impact initiative supported by the Foundation, are currently utilizing RBA in measuring the impact of their efforts.



In our implementation of RBA, we are applying an equity lens with the following steps:

- ❖ **Step 1:** Articulate **population-level results** and **indicators** we intend to target in each Area of Impact.
- ❖ **Step 2:** Understand the **inequities** that exist with disaggregated data and the root causes of disparities. Engage partners and the affected communities in the process.
- ❖ **Step 3:** Identify **strategies** and our **contribution** to address inequities and turn the curve on the indicators.
- ❖ **Step 4:** Identify **performance measures** to target resources and help determine whether our efforts are making a difference including how much we did, how well we did, and if anyone is better off.
- ❖ **Step 5:** Evaluate our progress and improve strategies over time with **continuous learning**.

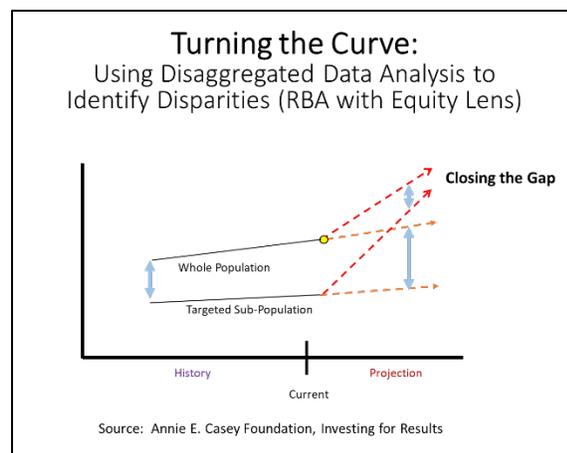


Exhibit 2 in the Appendix, summarizes the preliminary population results and indicators that we have identified for our **Areas of Impact** as an initial step in the RBA process.

3. ALIGNMENT: Our Work Aligned for Purpose

Alignment requires commitment to shared goals as well as time, space, and structure to communicate and coordinate priorities and activities.

How do we ensure that all of our efforts are aligned to work together and create the maximum impact for our community?

The Foundation’s various programmatic activities include grantmaking, impact investing, nonprofit capacity building, community engagement, and policy advocacy efforts, as well as supporting several programmatic initiatives. Donor stewardship is another core function as a community foundation serving over a hundred individual, corporate, and other foundation donors. These programmatic activities and donor stewardship efforts are supported by the Foundation’s communications, finance, investment, and operations departments.

Rapid growth and expansion creates challenges when it comes to coordination of efforts. Alignment requires commitment to shared goals as well as time, space, and structure to communicate and coordinate priorities and activities. With equity as a shared goal and RBA as a tool to measure our progress, the Foundation is working to align our efforts better across our programmatic activities and departments. The table in **Exhibit 3** in the Appendix, shows an example of how our equity agenda could affect our work and priorities across programs and functions over the coming years.



Along with internal alignment, the Foundation hopes to work with our partners for aligned contributions to improve community outcomes together. It will take all of our actions working together, reinforcing each other’s efforts to tackle some of the biggest barriers to a thriving and more equitable region and state.

2018 - A Transition Year

How do we implement these new changes in our work when we are not yet “walking the talk” as an organization?

It is a shift in how we approach our work, not just what we do, and these types of changes do not take place immediately. It is a long-term commitment and a journey.

The Foundation Board and staff recognize that implementing this new strategy focused on equity, results, and alignment will be challenging and complex. It is a shift in how we approach our work, not just what we do, and these types of changes do not take place immediately. We are embarking on a journey to reflect on our values and intentionally shift our thinking and practices for the long-term. The multifaceted efforts will bring together varying view points and experiences of diverse stakeholders – from individuals to institutions and ultimately into our communities.

We decided to embrace 2018 as a year of transition to launch us on the path with inquiry, experimentation, and learning by doing. We will implement incremental changes and invite our partners to join us on the journey and give us feedback to improve our efforts.

The priorities for implementing our strategic framework in 2018 transition year include:

- ❖ **Communicate** the Foundation’s new strategic framework and transition plan to key stakeholders and broad community.
- ❖ Develop and start to implement **SFCF Equity Framework** externally and internally across functions and programs (including capacity building, community engagement, and grantmaking). Engage partners and community in the process for shared learning.
- ❖ Start to implement **Results-Based Accountability (RBA) framework** including
 - **Population Indicators:** For Areas of Impact including results, population indicators, baseline, data disaggregation, root causes and turn the curve strategies. (implemented in two phases in line with SFCF community grant cycles)
 - **Performance Measures:** For SFCF core functions and programs and grantees.
- ❖ Improve **alignment** across functions and programs, particularly with equity and RBA frameworks.
- ❖ **Review progress** on implementation, reflect learning, and refine approach for 2019+.

Conclusion

When we summarize why we do what we do at the Foundation, it's about:

Our **Place**.

Our **People**.

Our **Power** Together.

These 3P's are what we are all about.

Place – No one encounters Santa Fe, northern New Mexico, or indeed the entire state, without knowing there is something unique to this place. Something profoundly special. The beautiful nature and confluence of cultures that create our rich fabric of life is unlike anywhere else on the planet. It's our obligation to steward this place and its many resources for both the present and the future. And while we celebrate this rich and unique inheritance, we recognize the reality that many underserved communities in our region face barriers in accessing the resources and opportunities they need to build strong, sustainable communities and economies.

People – As unique as this place is, so too is the diversity of people who call it home. Our diversity is a source of strength that helps create a vibrant society in our region. Yet, we also know that too frequently, history, race, and economic factors divide our people. Too many families in our communities – especially low income and people of color – experience significant challenges in achieving safety, wellbeing, educational success, and economic security. We believe that our community and economy are stronger when the most vulnerable members in our society have the support needed to overcome challenges, pursue a better life, and contribute to economic growth and vitality of the region.

Power – Power, when properly deployed, can create profound and systemic changes. However, we recognize that in many parts of our society and economy today, the balance of power favors those with existing privilege which may further exacerbate the disparities experienced by marginalized populations. The very people we try to serve and those that are most affected by the decisions we make are often left out of the decision-making process. We believe in the power of every person to affect change in their lives and communities and that we can build a more successful, sustainable community when our leadership and decisions reflect the racial, cultural, and socio-economic realities of its people.

As your community foundation, we serve the whole community. Still, deploying resources across our communities without a clear intention of who we serve and how we drive positive change, we would fail to have the maximum impact. So many of the social issues we try to address are big and complex and we must admit that our resources and capacity as a single organization are simply not enough to drive the change we want to see. As a community foundation, we sit at the intersection of power working across the proverbial table with so many cross-sector partners. With this unique privilege, we have always tried to empower all members of our community for positive social change. We are recommitting ourselves and doubling down on this legacy with an explicit strategic intent to address inequities in our community.

We are excited for what lies ahead – the opportunities, challenges, learning and ultimately impact. We hope that you will join us.

APPENDIX

Exhibit 1. SFCF’s New Strategic framework – Visual Overview

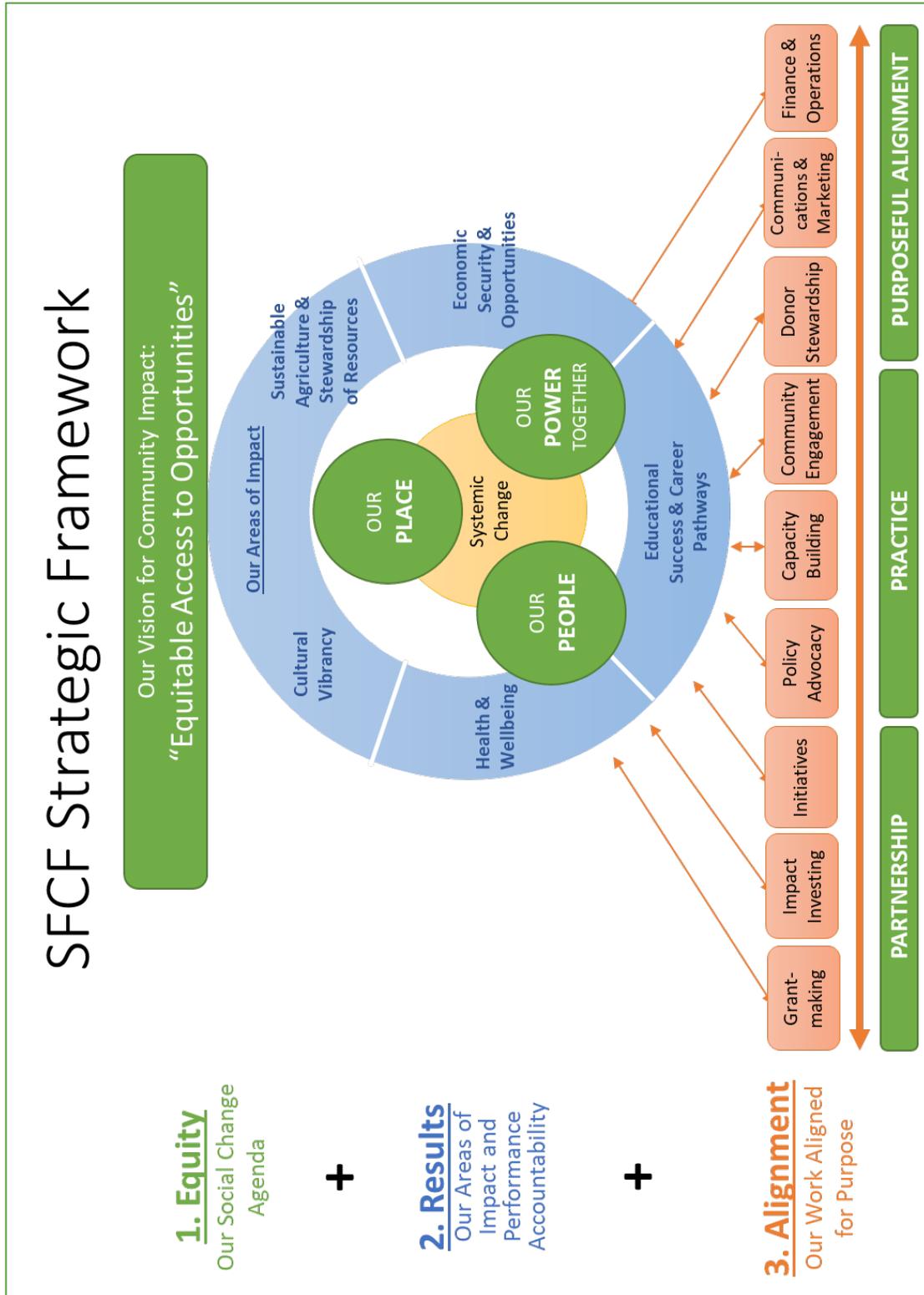


Exhibit 2. SFCF Areas of Impact, Results and Population Indicators

Areas of Impact	Results	Population Indicators
Educational Success and Career Pathways	<i>All children and youth succeed in education prepared for career</i>	<ul style="list-style-type: none"> • Kindergarten Readiness • 3rd Grade Reading Proficiency • 8th Grade Math Proficiency • High School Graduation Rate • Disconnected Youth Rate
Economic Security & Opportunities	All people can achieve economic security	<ul style="list-style-type: none"> • % Experiencing high housing cost burden (30%+) • Poverty Rate • Unemployment Rate • Median Household Income
Sustainable Agriculture & Stewardship of Resources	All communities have equitable access to our earth's critical resources: land, water, air & food for a sustainable and healthy ecosystem	<ul style="list-style-type: none"> • Local food self-sufficiency • Land, air & water health • Energy from renewable sources
Health and Wellbeing	All people are healthy and safe	<ul style="list-style-type: none"> • Homelessness • Food Security • Safety • Access to health care • Healthy Neighborhood Living Conditions
Cultural Vibrancy	Cultural identity is celebrated and reflected in the community	<ul style="list-style-type: none"> • Sense of community– Residents feeling connected to the community and each other • Diverse audience participation in community programs and events • Openness and acceptance of the community toward people of diverse backgrounds • Preservation & strengthening of cultural and historical heritage, traditions & a creative economy

Exhibit 3. Aligning Our Work for Equity – What Does It Mean?

	Aligning our work for equity
Grantmaking	<ul style="list-style-type: none"> • Target resources to address inequities for marginalized communities/people • Promote community voice and leadership in program design and decision making • Promote cross-sector collaboration & aligned strategies
Impact investing	
Initiatives	
Policy Advocacy	<ul style="list-style-type: none"> • Identify, prioritize and engage in policy efforts affecting equity • Support grassroots community organizing
Capacity Building	<ul style="list-style-type: none"> • Provide training for providers on equity framework and practice (e.g., implicit bias, cultural competence, trauma-informed practices, community engagement) • Support leadership development representing marginalized communities we serve • Build capacity / provide training on policy advocacy for funders, nonprofits, public
Community Engagement	<ul style="list-style-type: none"> • Support or act as convener / facilitator hosting conversations in the areas of community divides/conflicts and to facilitate aligned strategies across stakeholders/issues toward common goal prioritizing community voice & leadership • Consider building community advisory network
Donor Stewardship	<ul style="list-style-type: none"> • Inspire and support donors in equity-oriented philanthropy (e.g., through education / conversations, storytelling, learning circles/tours) • Connect donors and other funders to community work
Communications & Marketing	<ul style="list-style-type: none"> • Change narratives with stories of success in addressing inequities • Share narratives of equity values and practices to heal divides and change mindsets • Help frame and advocate community priority issues
Finance & Operations	<ul style="list-style-type: none"> • Support diversity and inclusion in hiring, contract and other organizational practices across SFCF functions and programs