



United Way  
of Central New Mexico

# *Strategic Planning*

*February 2010*



*Mission: To promote a culture of philanthropy and convene stakeholders to achieve measureable community improvement*



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### Special thanks to:

- *Dr. Al Romig, Sandia National Laboratories for chairing the Strategic Planning Committee.*
- *John Garcia, Director of Economic Development, City of Albuquerque and former Chief Economic Development Officer, University of New Mexico for facilitating the Strategic Planning process.*
- *Heather Balas and Barbara Brazil, New Mexico First, for donating their time and talent to facilitate the public forums.*
- *Ann Rhoades and Shannon Mick, Peopleink, for donating their time and talent to facilitate the values creation staff visioning session.*
- *Intel Corporation, PNM Resources, Sandia National Laboratories, Technology Ventures Corporation and Meyners + Co. for their corporate sponsorship of the public forums.*
- *Dr. John Stichman for chairing the Strategic Implementation Committee.*

## Executive Summary: Strategic Planning Committee Report

For 75 years, United Way of Central New Mexico (UWCNM) has served the people of central New Mexico by providing funding for services to those most vulnerable in our community. The purpose of this strategic planning process is to stay relevant and to build upon the success of the current model.

In summer 2009, UWCNM recruited a committee of key community leaders to create and lead its strategic planning process. UWCNM also engaged the services of New Mexico First, a nonpartisan public policy organization, to convene a series of four town halls to collect information from the public. More than 150 people shared their perspective on the strengths, weaknesses, opportunities and threats facing UWCNM. Participants included business leaders, social service providers, grantees, donors, volunteers and people who do not have a relationship with UWCNM.

UWCNM has built a very effective and widely supported business model, while maintaining the goals of helping others and improving our community. Businesses invest in the community through UWCNM because they want to attract more businesses, as well as the most qualified personnel. Individuals invest in the community through UWCNM because improving quality of life for those most vulnerable improves the quality of life for all. From the town halls through the subcommittee meetings, there was a clear request for UWCNM to become even more involved in the community.

UWCNM will continue to facilitate philanthropy. Donor designations will remain unchanged; donors will be able to designate to any charity of their choice while the Community Fund will evolve to the next level.

The Corporate Cornerstone Program will continue. It has effectively addressed the objection of deducting admin costs from individual donations and has attracted a significant number of new donors to UWCNM. Communication and engagement are keys to deepening these relationships to assure value for donors and companies.

**Differentiation of the Community Fund:** While there has been dramatic growth in designated giving through UWCNM, there has been negligible growth in the Community Fund. There is not enough differentiation between the Community Fund grants and individual designated donations. The Community Fund allocates money to agencies for specific programs through a volunteer review process; donors who support agencies through designations send over 88% of those donations to organizations in the same four county area.

Demonstrating impact of Community Fund dollars is difficult because of the current structure: more than one hundred programs receive funding in four focus areas. It is hard for donors to see the value of their gift to the Community Fund. For donors who designate their gifts to specific agencies, UWCNM also has no way to show the impact of designated gifts back to the donor. UWCNM cannot briefly answer the key question, "What was accomplished with my money?"

The recommendation is to make a clear distinction between funding agencies and funding systemic change by way of issue-based, service improvement. **The goal is to present donors with two desirable options as they make their philanthropic decisions.**

**Community Impact:** Work needs to be done to focus the Community Fund dollars on a few key issues for greater impact. The recommendation is to work in collaboration with service providers and other funders to determine key issues to be addressed. The goal is to create greater impact for Community Fund dollars by effecting systemic change in service delivery through convening stakeholders, creating collaborations and identifying and funding gaps in service. The intent is to spend the money we are already spending in a smarter way. The hope is that real change will be more likely and donors will find that issue based strategies are more results based and supportable.

**The Value of Collaboration:** UWCNM is uniquely positioned to bring multiple facets of the community together to build better systems of care. By including agencies and other funders, we can produce better, more comprehensive and more far-reaching results. Methods of measuring impact need to be developed and outcomes must be communicated back to the donors and the community.

**Reach and Retention:** The recommendation is to weave diversity and inclusion throughout UWCNM. We need to increase outreach and inclusiveness in order to increase the number of volunteers and donors from diverse communities. Another recommendation is for UWCNM to consider how policy development and policy involvement will affect subsets of donors.

UWCNM needs to focus on retaining existing donors, expanding to new donors and smaller companies and using new IT and communication tools. UWCNM needs to tell its story all year long, to focus on communicating results and to create life-long relationships beyond the workplace.

**Communications & Marketing:** Consistency of message throughout the organization is vital to its success and expansion. The work of UWCNM needs to be valuable, measurable and easily communicated. The core message needs to be the same to all audiences and still flexible in how, when and by what means it is delivered. UWCNM also needs to develop strategies to reach under-represented communities.

The valuable process of community input and feedback through the town halls should not stop with the strategic planning process. UWCNM needs to determine avenues to structurally build the give and take process into the revised business model: to create ways for individuals and groups to continually offer input and feedback, to assess that input and feedback and to make changes as appropriate. UWCNM also needs to enhance transparency.

Historically, UWCNM has not been active in the political arena. Yet many decisions are made in that arena which affect the human condition of the most vulnerable among us. While we do not wish to become part of politics, the committees did see a value in using our data and our issue expert partners as a way to inform the political process so that more informed decisions can be made. Caution needs to be used in this arena lest we alienate subsets of donors. UWCNM needs to develop a statement of Public Policy involvement that focuses on community education and relationship building/political education, with an emphasis on UWCNM's dedication to its mission and its neutrality in divisive issues. One recommendation is to adopt a Public Policy Decision Tree to assist UWCNM staff and volunteers in evaluating opportunities for community involvement. Another recommendation is to create evaluation teams to help determine which community groups, collaborations and coalitions to join.

**Capacity:** Capacity affects everything UWCNM does as an organization and for that reason must be kept in the forefront as it moves into the future. UWCNM needs to have the right number of people to do the work, with the right skill sets, at an affordable cost. It must balance commitments and capacity. UWCNM is fortunate to have volunteers who do so much for the organization. Partnerships and collaborations may disperse the workload to some degree; however, as UWCNM grows, the balance of commitments to capacity will need to be adjusted. UWCNM needs to study the capacity of each area.

## Business Model Recommendations

### 1) Develop strategies to sustain growth and broaden the donor base

Develop strategies to expand donor reach through

- a) Segmentation
  - By population, such as retirees, citizens at large, younger donors, people in transition, sole proprietors, members of professional organizations
  - Businesses by size
  - Corresponding infrastructure
  - Corresponding marketing strategies for each segment
- b) Metrics
- c) Campaign cycles
- d) Increased participation
- e) Donor retention

### 2) Develop methods to ensure community needs are being met

- a) Conduct a comprehensive needs assessment to help identify and address service gaps.
- b) Communicate clearly how restricted and unrestricted funds are used.
- c) Measure outcomes for all funds.
- d) Encourage collaboration through infrastructure efficiencies, such as sharing back room expertise and services (finance, administrative support, IT, etc.).

### 3) Increase the effectiveness of the Corporate Cornerstone Program

- a) To address the issue of sustainability, move the Albuquerque Family Advocacy Center (AFAC), Community Building Initiatives, Technology Assistance Fund and Priority Focus Area funding to the Community Fund/Community Services budget.
- b) Continue communication and transparency around the financial model.
- c) Move any excess Corporate Cornerstone funds to the reserves to cover part of the administrative costs in lean years.
- d) Consider a statewide Corporate Cornerstone program.

## Communications and Marketing Recommendations

### 1) Differentiate the Community Fund

- a) Augment existing UWCNM research with research from others in our community to identify gaps and inform the issues the Community Fund should focus on in the near future.
- b) Focus on a few very specific areas of impact based on researched community needs.
- c) Create marketing efforts to differentiate between gifts to agencies and gifts to the Community Fund and its related issues.

### 2) Determine appropriate volunteer and staffing levels

- a) Increase Community Fund staffing to create, implement and evaluate the new model and continue to build relationships with volunteers and the community.
- b) Increase Communications and Marketing staff, augmenting the staff with volunteer professionals and hiring an ad agency in order to provide consistent messaging.

### 3) Focus on donor retention and expanding reach

Retention and reach are significantly enhanced by consistent, brief, clear and year-round communication.

- a) Increase participation in the workplaces we now reach.
- b) Reach out to new workplaces.
- c) Develop strategies to capture, recapture or not lose donors no longer in the workplace.

### 4) Message consistency

It is vital that messaging is consistent and concise across the organization. United Way needs to develop a concise message that can be used by all staff and volunteers, but can be adapted to specific audiences.

### 5) Continue marketing the Corporate Cornerstone program

The Corporate Cornerstone Program has effectively addressed the objection of deducting administrative costs from individual donations and has attracted a significant number of new donors to UWCNM.

### 6) Continue building strong collaborations

- a) Collaborate with other funders, issue experts including agencies, business partners and other stakeholders to produce better, more comprehensive and more systemic results
- b) More inclusive collaboration on specific issues is better, as long as an outcome is achieved, measurable, sustainable, marketable and appealing to current and potential donors

## Community Building Recommendations

### 1) Determine community needs

Before UWCNM can determine which community needs to focus its funding and volunteer efforts on, it must first determine what the most pressing community needs are.

- a) UWCNM has an opportunity to model collaboration by partnering with the public and private sectors to develop an objective state-wide needs assessment, which would provide beneficial data to the corporate, nonprofit, governmental and educational sectors regarding current needs, identification of existing community assets and resources that address those needs, as well as determining service and funding gaps.
- b) The data derived from the needs assessment, along with United Way Worldwide goals and information from community coalitions and collaborations, would be used to develop issue-specific goals for the Community Fund grant process (Figure 1), as well as to enable UWCNM to participate in and convene conversations about gaps in services.
- c) Conduct the needs assessment within one year and use the collected data for the next grant funding cycle.

### 2) Develop metrics and key performance indicators for reporting results to the community on the progress made toward the community goals

- a) Develop two or three clear, concise, measurable goals for each Community Building initiative and/or Priority Focus Area (PFA) with a three- to five- year span for measuring progress towards systemic change (Figure 1).
- b) Establish a reasonable timeframe for agencies in which to truly measure and demonstrate the community “impact” of the funded programs.
- c) Consider reporting back to the community at least twice annually on the progress being made toward the goals.
- d) Work with agencies to develop an evaluation methodology in each issue/goal area that both determines program effectiveness and demonstrates the impact of the program.
- e) Base funding decisions on a program’s ability to affect a positive change toward the stated goals.

### 3) Develop stronger collaborations within the community

- a) Develop Community Solutions teams around identified key issues, comprised of members of the private and public sectors, service providers and issue “experts” and perhaps service recipients, if feasible, and led by UWCNM staff. These teams will further define which community groups, collaborations and coalitions UWCNM should partner with that most clearly align with selected community needs.
- b) Convene quarterly meetings of key agency staff and volunteers to discuss challenges, share successes, and identify gaps in addressing specific community issues.

### 4) Strengthen collaborations to achieve desired community goals and develop alternative funding methodologies

- a) Focus on building collaborations with other funders to focus resources, including, but not limited to funding, on the most pressing community needs in the four-county service area.
- b) Consider providing multi-year funding to select agencies through the PFA grants in an effort to provide more stable funding to give agencies adequate time (e.g. three years) to effectively measure success towards identified goals. Multi-year funded programs must have measurable goals and outcomes that do not just list activities, but demonstrate how real change is made possible.
- c) Reporting requirements for multi-year grants would include review of achieved goals and measurements on a regular basis throughout the period, such as semi-annually.

## 5) Consider the creation of a Development Fund for start-up agencies

Start-up agencies often have the passion of individuals who see gaps in service and other needs in the community, but do not have the capacity to offer a program that could meet the requirements of the multi-year or even annual PFA grant process. These agencies often can experiment with and develop very effective programs more quickly than larger agencies with more overhead. Therefore, it would benefit the community and the achievement of UWCNM's goals to provide an "incubator" for such agencies and programs.

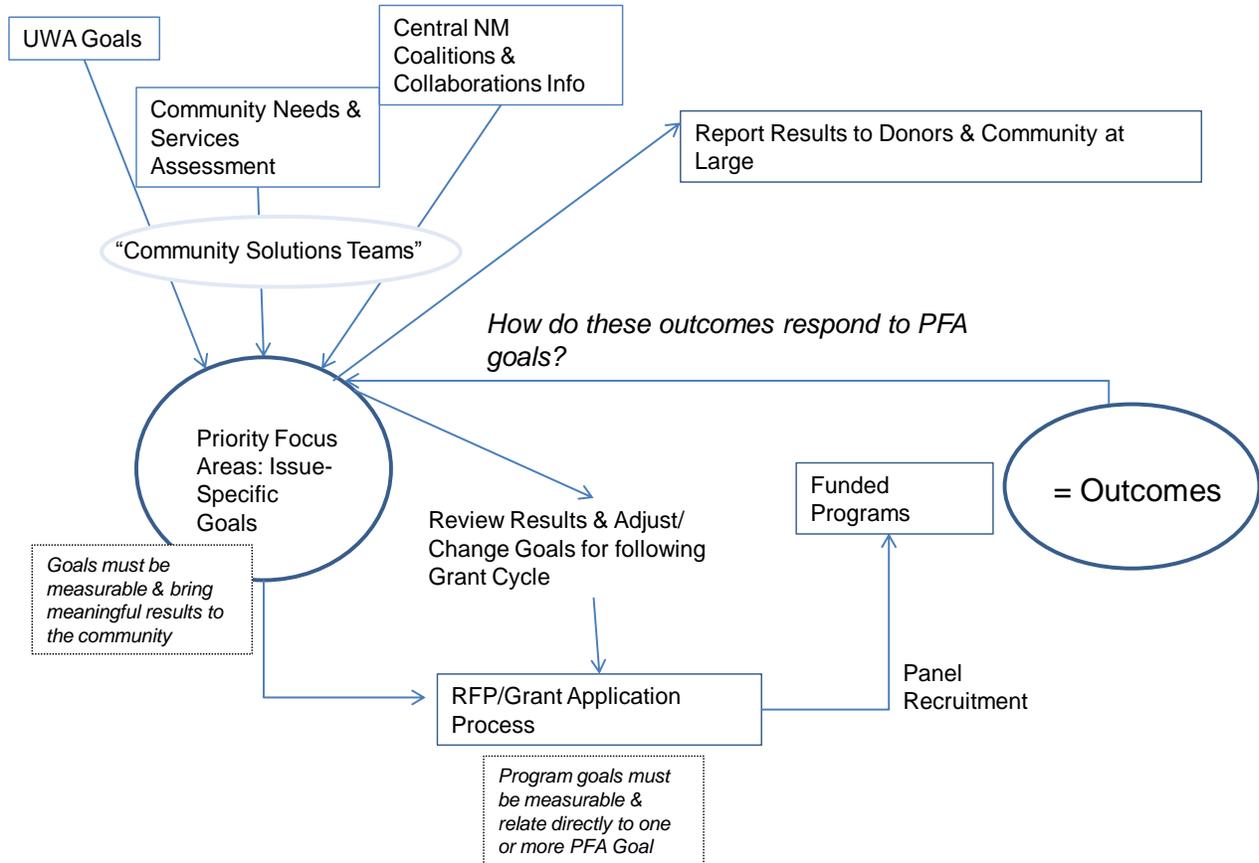
- a) Agencies with less than \$100,000 in annual revenue and their IRS 501(c)3 certification less than 5 years could only apply for a program grant from the Development Fund. This Fund would be limited to perhaps \$50,000 annually and would award small grants of between \$2,000 and \$8,000.
- b) Agencies would use a simpler grant application, would not have a site visit, and would make their program presentation to a volunteer panel (e.g. Community Impact Council and PFA Chairs).
- c) Agencies receiving a Development Fund grant would work with the Center for Nonprofit Excellence (CNPE) to develop the best mix of training, coaching, and mentoring opportunities to strengthen their capabilities as a benefit of their grant receipt. CNPE would help the agency build its internal and external resources so that it may compete within the larger grant processes.
- d) The programs would, like all other funded programs, need to relate back to needs assessment-derived goals.

## 6) Enhance the promotion of UWCNM's 2-1-1 Information and Referral service and develop the capacity to support the increased demand for service

- a) Secure the commitment of all local wireless carriers to provide "United Way 2-1-1" service.
- b) Increase evening coverage for 2-1-1 calls if demand warrants it.
- c) Build the capacity of 2-1-1 by partnering with Agora Crisis Center to take overflow calls, so callers seeking assistance have a high likelihood of speaking to a staff member or volunteer as opposed to being transferred to voice mail.

**Figure 1:**

**Proposed Priority Focus Area Funding Cycle Process**



## Diversity, Inclusion and Outreach Recommendations

### 1) Create the intention to be diverse, inclusive and to reach out

To create an atmosphere where everyone who cares about philanthropy is welcome, UWCNM needs to create the intention and mechanism to be more inclusive and have better outreach.

- a) Purposefully reach out to diverse populations within central New Mexico to ensure they feel included at all levels of UWCNM.
- b) All people affiliated with UWCNM must be committed to outreach and inclusiveness in order to tap into the true potential of our community.
- c) Develop a three-pronged approach to inclusion:
  - Inclusion of underrepresented groups as volunteers, staff and donors.
  - Outreach to underrepresented groups in the business/government community.
  - Outreach to underrepresented groups in the service recipient/provider community.

### 2) Raise overall consciousness on issues of accepting differences

- a) Create a culture of inclusiveness at UWCNM, regardless of race, gender, culture, religion, physical ability or sexual orientation to best represent the demographics of our diverse community through trainings, meetings, exposure and understanding.
- b) Build our cultural competency as an organization by understanding that all people have their own distinct culture and contributions.
- c) Create a culture where we recognize our differences and capitalize on them to work together efficiently in improving our community.

### 3) Design ways for diverse groups to be more public in their philanthropy

- a) Discuss the needs of specific communities and how UWCNM can facilitate outreach to them.
- b) Work with affinity groups at larger employers to learn how they deal with inclusion issues, and to reach out to members of those groups.
- c) Maintain active membership in various business organizations and establish active involvement with underrepresented communities.
- d) Establish a mentorship program to reach out to underrepresented communities and help them achieve their philanthropic goals.

### 4) Help expand philanthropy inside more diverse sections of the community

- a) Work together to create effective and compatible ways to meet diverse needs.
- b) UWCNM, as part of its community presence and purpose, should become involved in service-based events commemorating civil rights.
- c) Reach out to other groups that target the same populations within diverse communities for opportunities.
- d) Collaborate with groups looking to expand philanthropy inside their own communities through opportunities for partnership, mentoring or helping.

### 5) Inclusion of underrepresented groups as volunteers, staff and donors through outreach to business, government, nonprofit and other community groups

- a) Create an ad hoc committee of the Board responsible for carrying out UWCNM's Diversity, Inclusion and Outreach mission and purpose.
- b) Ensure underrepresented groups are represented on staff.
- c) Reach out to diverse communities for donor and volunteer recruitment.
- d) Expand our donor base by reaching out to underrepresented groups.

## Finance and Capacity Building Recommendations

### 1) Corporate Cornerstone Forum

- a) Create a forum for Corporate Cornerstone (CC) companies to discuss how funds are used and other topics of interest.
- b) Review the current priority order of the use of CC dollars and visit the potential of increasing reserves through CC.

### 2) Develop a financial video training tool

- a) UWCNM is transparent as far as making information available to donors, fund recipients, and volunteers on our website, etc. Transparency not only includes the element of availability but also understandability. A financial video training tool would enhance the currently available written materials and would be online for anyone to view at their convenience.
- b) The format of the financial statements has undergone significant improvement over the last several years and training tools have been developed on how the money flows through UWCNM for the website. This will serve as an additional resource.

### 3) Address Capacity

- a) Determine whether UWCNM has the appropriate staffing structure and staffing levels to operate under the existing model at the planned rate of growth and/or with changes made through the strategic planning process.
- b) Provide information to the strategic planning committee about staffing patterns of other United Ways with similar missions and of similar size to see how UWCNM compares.

### 4) Reduce Pledge Loss

Pledge loss results when a pledge is made and not fulfilled. The budgeted allowance for pledge loss for the 2008 campaign was over \$1M (4.42%, which is well below national averages). The majority of pledge loss occurs with payroll deduction pledges when an employee separates from his or her company during the year before fulfilling their pledge. For other types of pledges (i.e. cash, check, credit card, bill direct) the donor designations are only paid out when the payment is received, resulting in no loss of actual dollars for pledges loss. For payroll deduction pledges, designations are paid out one-twelfth per month.

- a) Significant progress has been made over the past two years to solicit monthly payroll deduction termination reports from companies indicating all employee payroll deduction payments that have stopped due to termination, cancellation, etc. This effort has resulted in a savings of over \$433,000 to date. United Way must continue soliciting companies to have their payroll departments notify us whenever a donor's payroll deduction has stopped for whatever reason.
- b) Hire a staff person to contact companies and develop a relationship with their payroll staff in an effort to receive timely notification when employees cancel their pledges due to termination or other reasons. This will eliminate paying out designations for which payment is not received. The position will save \$300,000-\$400,000 per year and will cost less than \$50,000 including salary and benefits.

## Public Policy/Advocacy Recommendations

### 1) Develop a Public Policy Statement

- a) Develop a statement of Public Policy involvement that focuses on community education and relationship building/political education. Public advocacy and lobbying or political action would have very minor roles.
- b) The statement should focus on UWCNM's dedication to its mission and to its neutrality in issues that could divide the community.

### 2) Examine the Social Action Policy

- a) Look at the pros and cons of eliminating the Social Action Policy (SAP).
- b) If program funding were tied to tight, needs assessed goals, would this policy be necessary?
- c) What are the repercussions if we funded a program from a controversial agency? Are there corporate funding issues that may relate to the policy's elimination? Some discussions with our Corporate Cornerstone companies and largest employee campaigns may be necessary to fully investigate any possible repercussions of eliminating or altering the SAP.

### 3) Use the Public Policy Decision Tree (Figure 2) to examine opportunities regarding policy issues

- a) The decision tree will involve UWCNM staff and volunteers in evaluating opportunities for community involvement, for community education and relationship building, political education, public advocacy, lobbying or political action.
- b) This decision tree should be public information so that all stakeholders understand how UWCNM evaluates requests for policy involvement.

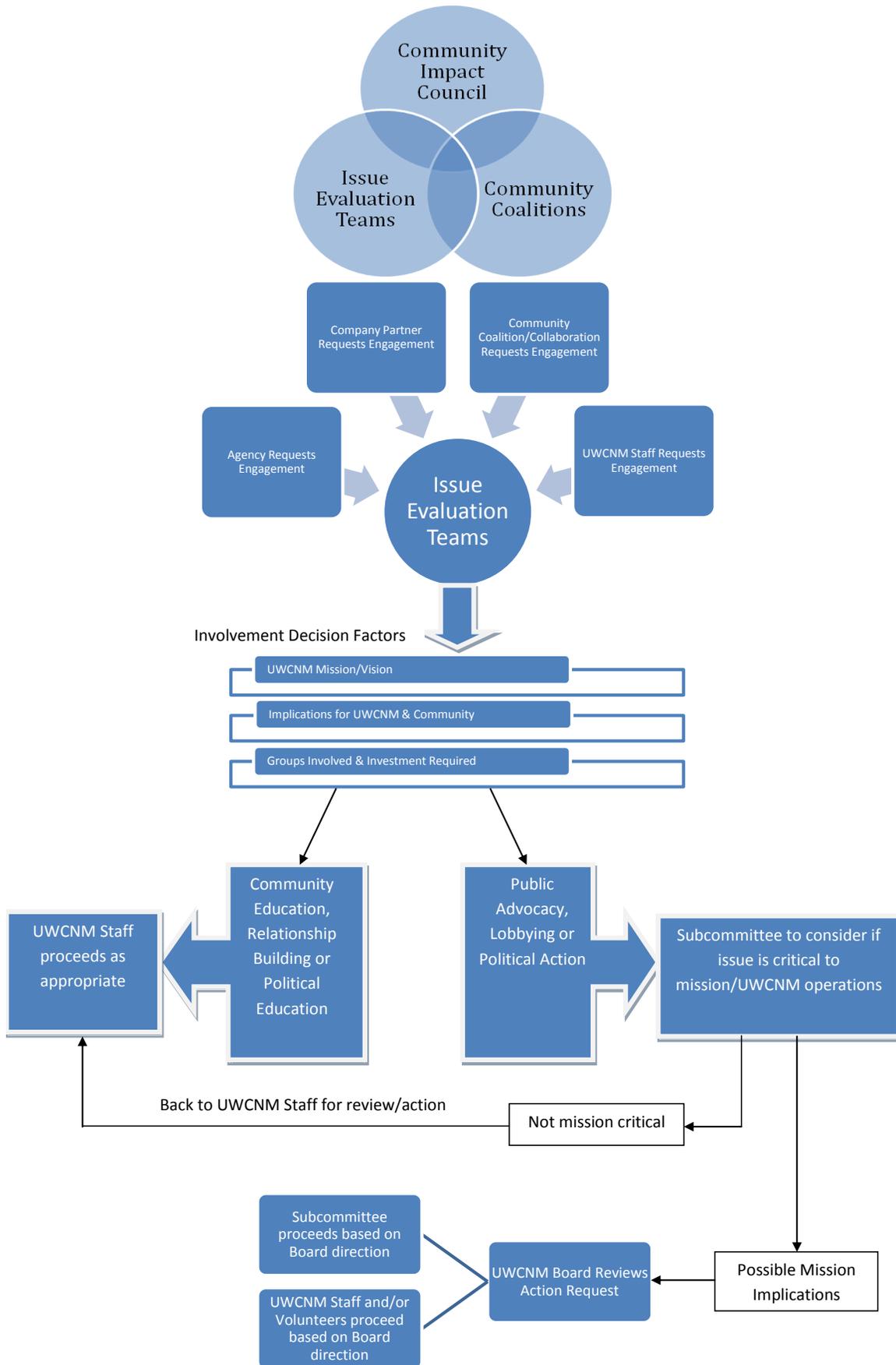
### 4) Develop evaluation teams (aka Community Solutions Team)

- a) Set up staff and volunteer groups similar to UW Dane County's Community Solutions Teams that would be the first line in examining these opportunities.
- b) In addition to specific goals related to community needs, the decision tree and the Community Solutions Teams would help UWCNM decide which community groups, collaborations and coalitions to join.

### 5) Evaluate structural changes related to Community Development processes

- a) Look at how the Public Policy Decision Tree and specifically the development of issue evaluation teams, like the Community Solutions Teams, would relate to the Community Impact Council, the Priority Focus Area Chairs who are part of that Council and the Priority Focus Area grant allocation panels.
- b) Priority Focus Area Chairs, who are part of the Community Impact Council, could also serve on the Issue Evaluation Teams.
- c) The Issue Evaluation Teams would also include members of issue-specific community coalitions or collaborations.
- d) The teams would have oversight and input into community needs assessments and evaluations, grant funding under UWCNM's Community Fund and, per the Public Policy Decision Tree, filter public policy involvement requests and questions.

**Figure 2: Public Policy Decision Tree**



## Next Steps

How will we make the transition from where we are today? The chart below identifies major activities required to transition to a more complete community impact United Way.

Action	Who	When
1. Present strategic plan to UWCNM Executive Committee	Dr. Al Romig & Ed Rivera (President & CEO)	January 2010
2. Revise recommendations based on Board review and input	Ed Rivera	February 2010
3. Present to UWCNM Board of Directors for approval	Dr. Al Romig	March 2010
4. Recruit and convene Strategic Planning Implementation team	Dr. John Stichman, Chair, Ed Rivera and Randy Woodcock	March – November 2010
5. Develop cost estimates of recommendations and net budget impact	Strategic Planning Implementation Team	May 2010
6. Present operational and strategic planning implementation plan updates executive committee	President & CEO and Dr. John Stichman	Ongoing April - November 2010

## Appendix I: Strategic Planning Committee

**Chair**      **Dr. Alton D. Romig, Jr. (AI)**  
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## Appendix II: Strategic Planning Subcommittee Participants

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## Appendix III: Strategic Implementation Committee

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Rick Johnson & Company

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Kent Walz  
Albuquerque Journal

Kirk Benton  
ABQ Engineering, Inc.

Patrick Wilkins  
Meyners + Co., LLC

Mary Cooley  
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Diane Harrison Ogawa  
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Ex-Officio:  
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City of Albuquerque

Brian Rashap, PhD  
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