



MEMO

To: Board of Trustees
From: Bob Bowman, Philanthropic Advising and Advancement Committee Chair
Date: March 28, 2023
Re: Philanthropic Advising and Advancement Committee Report

The Philanthropic Advising and Advancement Committee heard updates on our Lunch & Learn highlighting the new PRIDE Circle, the Estate Planning Conference, and other upcoming events. We also discussed updates on our Future Fund and Social Giving Club Giving Circles, as well as Philanthropic Advising and Advancement Committee updates. Below are the details discussed by the Committee:

- **Lunch & Learn** - ACF hosted the first Lunch & Learn of the year titled Lunch & Learn Lessons on Impact: Philanthropy's Role in Supporting Albuquerque's LGBTQIA+ Community. Marshal Martinez from Equality New Mexico was one of our speakers, and ACF Staff who introduced the PRIDE Circle. The event was an overall success and received positive feedback from attendees. This is our largest attended Lunch & Learn with 38 attendees. Attendees noted that they were interested and engaged in the discussion and that they would recommend a similar event to a friend. This event was one of the efforts of the Foundation to make philanthropy more accessible and to diversify our donor base. The Foundation is grateful for the feedback from the committee and attendees and looks forward to implementing the suggestions.
- **Estate Planning Conference** - ACF hosted the 4th Annual New Mexico Estate Planning Conference on March 3, 2023. The event was hosted at New Mexico Mutual – a community partner. We had 58 attendees, 48 of which were in-person. The speakers included professionals in various areas of Estate Planning and ranged in ages. Attendees noted that the topics were interesting and engaging and that they would encourage professionals even outside of the estate planning realm to attend. The event was followed by a Happy Hour that allowed for attendees to network. The event was a great success and preparation for the 2024 Conference is already underway.
- **Giving Circles** – The Committee reviewed the current membership numbers for Future Fund and Social Giving Club. Both groups currently have 19 members for 2023. Committee members shared upcoming events for both groups and shared their 2023 Membership Goals. The PRIDE Circle has 10 founding members so far, and has received \$7,000 in contributions so far. The Foundation and PRICE Circle members are working together to plan events that will include prospective members. The goal for the PRIDE Circle is to reach \$25,000 by the public launch on June, 30th 2023. Committee

members also invited others to join the Giving Circles if they are already not part of them. The Philanthropic Advising team has some planning sessions scheduled with Maggie's Giving Circle.

- **Great Grant Giveaway** – ACF is hosting our 10th annual Great Grant Giveaway on Friday, May 12th from 11:15 am to 1:00 pm at Hotel Albuquerque. We will be granting out the largest amount in the event's history, and we are expecting 700 attendees. It was shared that this year's recipients will all be within our seven fields of interest: animal welfare (new in 2023), arts & culture, education, environmental & historic preservation, economic & workforce development, human services, and health.
- **Open Discussion Topics** - How can the Advancement Committee further engage Board of Trustees? And how can the Advancement Committee engage new donors? Members suggested hosting smaller more specific events that will be a targeted effort to engage new donors. The Foundation made a personal ask to our Board of Trustee Members to attend our Lunch & Learn, as well as did a target marketing effort to members of the community who would be new to the Foundation to join us for the Lunch & Learn as well. The Foundation staff has also implemented a new process to further engage Professional Advisors following the Estate Planning Conference as well.