



MEMO

To: ACF Board of Trustees
From: Bob Bowman, Advancement Committee Chair
Date: November 4, 2025
Re: Advancement Committee Update

The Advancement Committee's recent meeting held on November 4 focused on a recap of the Development & Marketing Department's work in the last quarter of 2025, and a high-level look at what's next for the Department in 2026.

Committee Leadership Update

The meeting marked the final Committee meeting chaired by Bob Bowman, whose leadership since 2022 was recognized with appreciation from Committee members. The group also welcomed Trustee Lisa McCulloch as a new Committee member, adding additional board representation. A new Committee Chair will be announced at the end of the year.

Record-Breaking Development Performance

The Foundation celebrated its most successful year to date, with 45 total funds established across ACF and NMCT. This included multiple new endowed and quasi-endowed funds and partnerships with organizations such as the National Institute of Flamenco and the Hispano Philanthropic Society. More funds are anticipated before year-end, reflecting strong community trust and signaling future needs for expanded stewardship capacity.

Year-End Tax Environment and Donor Communication

The Committee discussed anticipated federal tax law changes, which make creating Donor Advised Funds more favorable in 2025 than in 2026. The Foundation is emphasizing this in year-end communications across year-end letters, social media, and donor meetings. Trustees may find this information helpful when engaging in their networks.

Donor Engagement and Pipeline Strength

Donor engagement efforts remain strong with 25 events, drawing more than 1,650 attendees and active cultivation underway for 34 endowment prospects. Additionally, six estate funds are likely to be finalized by year's end. These indicators demonstrate a healthy pipeline and reinforce the importance of maintaining major gift and stewardship capacity.

Rooted Together Initiative Progress

The Rooted Together Block Party on October 17 brought in nearly 200 attendees and raised \$97,000 toward the \$100,000 annual goal. The event deepened the Foundation's partnership with StreetVision and showcased powerful community stories. Further outreach to DAF holders may help close the remaining funding gap.

Launch of the Catalyst Fundraising Collective

The Foundation is launching a new mentorship initiative for emerging nonprofit development staff through the Fidelity Charitable Catalyst Grant. Beginning December 9, the Catalyst Fundraising Collective will pair emerging fundraisers with experienced mentors, helping strengthen regional nonprofit talent.



Key 2026 Initiatives and Planning

The 2026 Estate Planning Conference will expand to two full days, becoming the state's primary convening for planned giving professionals after Southern NM Community Foundation sunset its own conference. Additionally, the Foundation will partner with the Center for Effective Philanthropy to administer its first large-scale donor survey. Covering approximately 700 donors, this survey will provide valuable insights into donor perceptions and engagement, with results expected in mid-2026.

Incoming CEO's Strategic Priorities

Incoming President & CEO Marisa Magallanez outlined her priorities for 2026, which include strengthening internal infrastructure, growing donor engagement capacity, and taking bold, community-oriented "big swings." She emphasized collective impact, revisiting organizational metrics, and deepening understanding of long-term success. Committee members encouraged attention to New Mexico's aging demographic and reaffirmed their roles as ambassadors who surface community insights.