



MEMO

To: ACF Board of Trustees
From: Katie Esquibel, Advancement Committee Chair
Date: February 17, 2026
Re: Advancement Committee Update

The Advancement Committee's recent meeting was held on February 17 to review leadership transitions, departmental restructuring, and new systems designed to strengthen donor engagement, stewardship, and long-term fundraising performance. The committee also discussed opportunities for deeper board involvement in advancement efforts.

The Marketing & Development team reported a record year in several key areas and is implementing important structural improvements to support continued growth.

Leadership Transition and Departmental Restructuring

Marisa Magallanez, President & CEO, provided an update to the Committee about the most recent promotions and the next era of the Marketing & Development department.

- Denise Nava has been promoted to Vice President of Communications and Operations.
- A search will begin for a new Vice President of Development, with an anticipated hire by summer, depending on the search timeline.
- The current combined Marketing and Development department will be formally split into:
 - Communications & Operations
 - Development

Denise will serve as Interim Vice President of Development during the transition and will continue supporting Advancement Committee work until the new VP is fully onboarded. This restructuring reflects the Foundation's growth and positions the organization to better support fundraising strategy, communications, and operational excellence.

Launch of the Portfolio Management System

A major development initiative now underway is the formal rollout of a comprehensive donor portfolio management system. Every major donor including DAF holders, Heritage Society members, Partners in Philanthropy, and Trustees is assigned to a specific staff portfolio manager. Staff portfolios range from approximately 10 to 40+ donors, depending on the staff person's role. Each donor will receive a minimum of four Foundation-initiated touchpoints per year. Outreach will be personalized based on donor history, engagement level, and communication preferences. Staff are using the C-Suite CRM system, which integrates directly with Outlook for seamless task tracking and record-keeping.

Enhanced Donor Onboarding Process

The team is also formalizing a more comprehensive onboarding experience for new donors. Elements under development include key staff contacts, donor portal access instructions, fund management tools and event engagement opportunities. The goal is to ensure that new donors feel confident, informed, and connected from the outset of their engagement with the Foundation.



New Mexico Estate Planning Conference

The Committee received an update on the upcoming Estate Planning Conference from Melody Wells, Major Gifts Officer. This conference continues to serve as both a community education opportunity and a strategic advancement initiative. The conference has been extended to two days, which continues to position the Foundation as a trusted partner in legacy and planned giving conversations. It also provides Opportunities to deepen relationships with professional advisors, attorneys, and financial planners.

KPI Development Dashboard

Denise provided a preview of a formal Key Performance Indicator (KPI) dashboard for development initiatives at the Foundation and New Mexico Community Trust.

Dashboard Objectives:

- Provide clearer visibility into performance and fundraising efforts in comparison to the prior year.
- Establish consistent benchmarks for fundraising, stewardship, and engagement.
- Donor growth and engagement
- Portfolio engagement activity (touchpoints, meetings, follow-ups)
- Growth in fundraising initiatives such as Partners in Philanthropy, Heritage Society commitments, and Corporate Partners in Philanthropy.
- Year-over-year fundraising comparisons

Learning and Engagement Expectations

Committee members reflected interest in more involvement in fundraising efforts and stewardship with the Development team. Opportunities that are being explored include ambassador roles and peer introductions, participation in donor meetings, handwritten notes, event hosting and attendance, sharing the Foundation's story within networks. A more structured engagement framework will be developed in upcoming Committee work.