



ALBUQUERQUE
COMMUNITY
FOUNDATION

trust • equity • integrity • accountability

Trustee Engagement Opportunities

Governance

- Attend Board Meetings/Forums (4-6 per year; miss no more than 1 Board meeting/Forum per year)
- Sit on at least one committee; miss no more than 1 committee meeting per year
- Mentor a Trustee
- Serve as Committee Chair
- Serve in an executive role on the Board

Development: Donor Stewardship

- Sit on Advancement Committee
- Connect Foundation staff to professional advisor
- Make at least five donor thank you calls
- Ask a friend or prospect to make a monetary donation

dEi

- Complete 3-hour dEi learning expectation minimum
- Complete more than 3-hour dEi learning expectation minimum
- Share dEi learning completed outside of Foundation
- Lead dEi training in partnership with the Community Impact & Leadership Department, at Board meeting/Forum

Grantmaking

- Serve on Annual Grant Cycle Panel
- Serve on a Scholarship Panel
- Join a Giving Circle

Events

- Attend the Annual Business Meeting
- Attend at least one event from the Foundation's series events, can include PEEP, Community Cruise, Lunch & Learns, any Giving Circle events (Future Fund, PRIDE Circle, Social Giving Club, Future Future Fund)
- Attend at least one event from the Foundation's single events, can include Estate Planning Conference, Investment Review, Giraffe Award Celebration, Scholarship Recipient Celebration, Annual Appreciation Celebration, Fall Speaker Series
- Attend an event hosted by one of the nonprofits the Foundation supports
- Bring a friend(s) to an event!

Corporate Partnership Relationship Building

- Make connection between staff and new prospective Corporate Partner
- Join Development Team in Corporate Partnership ask meeting
- Directly secure Corporate Partner relationship

Capacity Building

- Volunteer with nonprofit supported by the Foundation
- Lend your expertise to support nonprofit capacity (i.e. financial planning, website development, etc.)



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Trustee Engagement Sheet



Required

- Attend Board of Trustee Meetings/Forums (4-6 per year)
- Attend Annual Business Meeting
- Sit on at least one Committee per year
- Serve on a minimum of one Annual Grant Cycle panel per three-year term
- Give or Get Pledge (\$15,000 per three-year term served)
- Complete Annual Trustee Documents including:
 - o Trustee Data Form
 - o Code of Conduct
 - o Statement of Potential Conflict
 - o Policy on Confidentiality

Encouraged

- 3-hour dEi Learning Expectation
- Attend 2-3 Foundation Events Annually (see Opportunities List for full event list)
- Make connection between staff and prospective Corporate Partners, donors and/or fund holders
- Connect staff to professional advisor
- Establish an endowment fund and/or planned gift by the conclusion of their service on the Board

Self-Identified Engagement

View full list of Engagement Opportunities here.

- _____
- _____
- _____
- _____
- _____

Trustee Signature: _____

