



MEMO

To: ACF Board of Trustees
From: Marisa Magallanez, President & CEO
Date: June 18, 2026
Re: Strategic Plan Update

I am pleased to share that we have selected [Public Equity Group](#) (PEG) to serve as the Foundation's strategic planning consultant.

Following a competitive RFP process that included five proposals, interviews with three firms, and reference checks, PEG emerged as the strongest partner to guide the development of a community-informed strategic framework as we approach the Foundation's 50th anniversary in 2031.

Several priorities informed the selection, including:

- Building alignment across Board and staff.
- Meaningfully incorporating community and stakeholder voice.
- Balancing bold vision with practical implementation.
- Bringing community foundation expertise and field-wide perspective.
- Supporting thoughtful conversations around philanthropy, donor engagement, and long-term sustainability.

PEG distinguished itself through its deep experience with community foundations, strong facilitation approach, and emphasis on translating strategy into action. Their process is designed to build broad ownership while helping organizations move from planning to implementation. I was also drawn to their understanding of community foundations as "big tent" institutions that bring together diverse perspectives in service of community impact.

The contract amount is \$150,000, with travel and engagement-related expenses capped at \$20,000. This investment was anticipated in our budget planning and will be spread across 2026 and 2027.

Our next step is to establish a Board/Staff steering group and begin Phase I of the planning process this summer.

Thank you for your partnership and support. I look forward to engaging all of you as we begin shaping the Foundation's next chapter.

Albuquerque Community Foundation

Kickoff Meeting

ACF Kickoff Meeting | June 17, 2026



ALBUQUERQUE
COMMUNITY
FOUNDATION
trust • equity • integrity • accountability



About Public Equity Group



PUBLIC EQUITY GROUP

is a diverse
“network” of
strategy and
management
consultants
mobilized to help
visionary leaders
and organizations
achieve impact

- **Boutique consulting firm** focused on strategy development & management practices for philanthropic & community-based organizations nationally
- **We work with partners poised to make a demonstrable difference** on the “big issues of the day” in service of equity
- **We seek clients with the following qualities:**
 - Deep **social change** commitment and compatible organization values
 - High potential for national or global **impact**, scale, and/or replication
 - Strong **leadership** (strategic thinking, management, implementation)
 - **High organization capacity** to implement (staff and board quality; planning, monitoring, operations, and systems quality)

PEG principles

The logo for Public Equity Group is a dark square containing the words "PUBLIC", "EQUITY", and "GROUP" in white, stacked vertically and separated by horizontal lines.

**PUBLIC
EQUITY
GROUP**

- We seek impact, first & foremost
 - Seek justice & equity
 - Fiscal responsibility
- We (humbly) aspire to excellence
- We are hypothesis & data-driven
- We are effective, efficient, and fun
- We celebrate our diversity and embody global values (especially “empathy”)
- We express gratitude (Thank you, many times over!)

Introductions

Our firm is comprised of sector experts and rising stars — a diverse community of professionals with shared values and a deep commitment to social and economic justice



Eboni Bledsoe is a management consultant whose work has focused on supporting global organizations through transformations at scale

Education:
BA from Duke
MA from George Mason

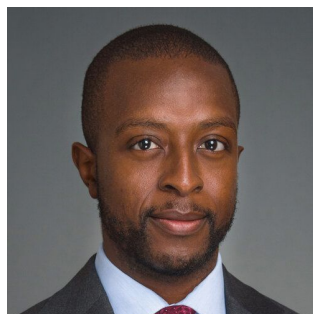
Recent projects include:
Nebraska Early Childhood Collaborative, Mindful Life Project, The REACH Institute



Rohan Cooppan-Boyd is a recent graduate who brings research experience to his work in urban revitalization.

Education:
BA from University of Chicago
MA from University of Chicago

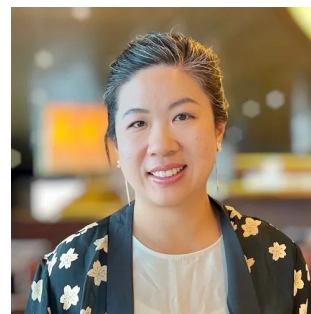
Recent projects include:
Community Foundation of Greater Buffalo, Turner Center and Labs, MacArthur Foundation, Trinidad Rancheria



Taonga Leslie is a strategy consultant who brings experience in the legal and nonprofit sectors

Education:
JD from Yale
BA from Harvard

Recent projects include:
MIT CoLab, Meyer Memorial Trust



Lillian Mark is a project consultant who brings experience in health and human services nonprofit sector

Education:
BA from University of California, Berkeley

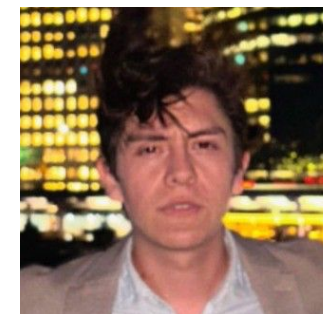
Recent projects include:
Albuquerque Community Foundation



John Newsome is the founder of Public Equity Group and has been a strategy and management consultant since 2001

Education:
BA, MA & MBA from Stanford

Recent projects include:
Planned Parenthood Federation of America, Obama Foundation, MIT CoLab, Open Society Foundations, New American Leaders



Jaime Vazquez is a research fellow who brings advanced technical training and a commitment to social equity to his work

Education:
AS from Santa Monica College
BA Candidate from Columbia University (Junior year)

Recent projects include:
Raising A Reader, ACLU-PR

Past clients



Overview of ACF strategy approach (June 2026 - February 2027)

	Phase One Diagnostic & Landscape Scan (Jun – Sep 2026)	Phase Two Strategic Framework (Sep – Dec 2026)	Phase Three Organization Planning (Dec 2026 – Feb 2027)
Key work streams	Albuquerque CF Diagnostic - Explore opportunities and challenges across ACF's core work (e.g. grantmaking across seven fields of interest, scholarship programs, giving circles, impact investing, community leadership initiatives) through organizational document review - Map Board and staff engagement to clarify expectations, decision roles, and touchpoints throughout planning process and facilitate discussions for meaning-making - Conduct interviews with key stakeholders to explore organizational strengths, challenges, and opportunities Landscape Scan - Interview donors, nonprofit partners, civic leaders, and philanthropic peers to understand the policy, socioeconomic, and philanthropic context shaping ACF's work across four counties - Partner with a local consultant to engage residents and community members with lived experience in culturally responsive listening sessions - Conduct a literature and field review on the state of community foundations, highlighting key trends, best practices, and strategic implications - Synthesize insights to identify ACF's distinctive role and highest-leverage opportunities going forward	Intended Impacts & Strategic Priorities - Facilitate discussions with leadership, staff, and the Board/Staff Working Group to identify ACF's greatest opportunities for impact over the next five years - Define community-informed priority areas for more intentional focus of ACF's discretionary resources and community leadership capacity, and the decision criteria that will guide priority-setting - Identify key strategies and partnerships to advance ACF's mission, including opportunities to deepen place-based commitments across the four-county area and sharpen focus on where ACF can have the most meaningful impact Emerging Implications - Explore emerging implications for ACF's programs, philanthropic services, communications, and operations; assess feasibility of potential directions - Identify how the Foundation's 50th anniversary in 2031 can be integrated into the strategic vision as a meaningful milestone for the community	Organization Implications - Assess programmatic and organizational implications of the refined strategy, including staffing, structure, systems, and governance - Identify high-level financial implications of the strategy, including areas where shifts in priorities may influence revenue needs and funder conversations - Define success measures to help ACF monitor and communicate progress against its strategic priorities Strategic Plan Synthesis - Synthesize findings and strategic choices into a draft five-year strategic plan for review and refinement with leadership, staff, and the Board/Staff Working Group - Refine the plan based on feedback prior to final Board adoption
Key deliverables	- Board/Staff Working Group launch & engagement schedule - Diagnostic - Landscape scan	- Initial strategic framework (Intended impacts, strategic priorities) - Present at Oct '26 Board meeting	- Program & organizational priorities - Financial projections - Strategic plan draft - Present exec sum. at Feb '27 Board meeting

Proposed stakeholder engagement

Roles	Activities	Estimated time commitment
Project Leadership	Confirm and refine scope of work; provide input on key questions and emerging findings; align on strategic direction	1-2 hours weekly; additional time as needed
Leadership Team	Provide feedback on project progress	1-2 hours every 4-6 weeks
Staff Strategic Planning Group	Provide regular input and feedback throughout the engagement; review diagnostic and landscape findings; support alignment and buy-in across the organization	1–2 hours monthly for working sessions; initial interviews as appropriate
Staff engagement	Provide input on organizational priorities and direction; share perspective on ACF’s opportunities and challenges	All staff kickoff; staff meetings; 1:1 interviews
Board Steering Committee	Provide input on priorities and organizational direction; shape and adopt the final strategic framework; participate in key milestone presentations	Initial interviews; October 2026 and February 2027 Board presentations; other involvement as appropriate
Board engagement	Provide input on organizational priorities and direction; Share key insights on ACF’s unique strengths, impact, and opportunities for growth	Board meetings; 1:1 interviews
Donors, fundholders, nonprofit partners, and civic leaders	Share key insights on ACF’s unique strengths, impact, and opportunities for growth; provide input and feedback on findings	1:1 interviews; small group interviews; other involvement as appropriate
Residents and community members; with local consultant TBC	Share lived experience and community perspectives to inform strategic priority areas; participate in culturally responsive listening sessions facilitated in partnership with a local consultant	1:1 interviews, other involvement as appropriate
Other consulting firms engaged with ACF: resident voice, org culture	Provide input and feedback on findings; share key insights on ACF’s unique strengths & opportunities for growth	1-hour interviews; other involvement as appropriate