



MEMO

To: Board of Trustees
From: Pam Hurd-Knief, Philanthropic Advising and Advancement Committee Chair
Date: September 20, 2022
Re: Philanthropic Advising and Advancement Committee Report

The Philanthropic Advising and Advancement Committee heard updates on our Lunch & Learn, Trolley Tour, Donor Engagement Calls, Annual Report, Donor Party, Professional Advisory Engagement and Speaker Series events. The Committee also heard our accountability report, which displays our progress towards reaching our goals. We also discussed updates on our Future Fund and Social Giving Club Giving Circles as well. Below are the details discussed by the Committee:

- **Lunch & Learn** -The September 9th Lunch & Learn which highlighted Trust Based Philanthropy (TBP). The event was hybrid and Nate Morrison from NACA Inspired Schools was our Keynote speaker. We also had Ian Esquibel, Oak Hill Coaching and Consulting, speak from the donor perspective and Khia Griffis, ACF, speak from the Foundation's perspective on the topic of TBP. The Foundation received positive feedback from the attendees.
- **Department Events, Speaker Series & Trolley Tours** - Notable New Mexicans in Philanthropy Speaker Series has our next event on November 2nd from 5:30pm-7pm and Ian McKinnon will be our Keynote. The event will be hosted by the Albuquerque Academy where Ian is an alum and a current board member. We will have a private reception prior to the fireside chat. We are expecting this Speaker Series event to have 250-500 attendees. The last Trolley Tour took place on Monday, August 1, 2022 and centered on youth in philanthropy. There were thirteen attendees and the tour visited four different nonprofits, including ALMA (Apprenticeships for Leaders in Mosaic Arts). Student interns talked about how they design, fire tiles, and install mosaics. Our Trolley Tour guests got to build small mosaics. We also visited Warehouse 505 and the children played games at the Fusion & Actor's Space. Lastly, the students worked with Kids Cook to make a salad for our lunch.
- **Professional Advisors** - We are engaging with our Professional Advisors throughout the year and have met with 7 of the 10 that we're scheduled to meet with. The date for next year's Estate Planning Conference, March 3, 2023 has been determined and we are already reaching out to speakers.
- **Giving Circles** - The Committee reviewed the membership goals for Social Giving Club & Future Fund. We reviewed upcoming events and meetings. The Social Giving Club

has their grant night on November 10, 2022 and our membership numbers are 34. Future Fund is celebrating its 25th Anniversary and they have 96 members to date.

- **Open Discussion Topic** - Do you have suggestions or ideas on special ways to show appreciation for our donors at the Donor Party? During our meeting the Committee members discussed ways to make donors feel appreciated during our donor party. The suggestions of a personal photo that includes a thank you note was offered. Committee Members felt that lanyards and pens do not have as much of an impact.