



Board of Directors (Trustee) involvement in Planned Giving Ideas

Consider the potential benefits of having a major gift society and legacy society. These could serve as a platform to recognize and honor our board members' contributions. I encourage you to establish them and extend a special invitation to our board members to become charter members.

Model good behavior by belonging to both. You can solicit board members by inviting them to "Join Me" in the XYZ society.

It is crucial to secure the CEO's partnership in belonging to leadership-giving societies. This not only sets a positive example but also reinforces the endorsement of the action plan.

1. Establish a development committee of the board of directors.
 - a. Sets expectations for the board, giving
 - I. Give, Get, or Get off
 1. While on our board, we are among the top 3-5 charitable entities in \$ support
 2. Membership in major gift society and legacy society (strive for 100% participation)
 - II. Board giving @ XY % of the total campaign (annual/capital)
 1. Foundations frequently inquire about board leadership
 - b. Establish a Planned Giving subcommittee or separate advisory committee
 - I. Enlist them in creative planning re: endowment building, estate planning; JF, first endowed chair
 - II. Enlist them as models, speakers, presenters, endorsers, solicitors, hosts (DG)
2. Be involved in recruitment/orientation of new board members:
 - a. Nominate good candidates
 - b. Pre-screen candidates before they are officially nominated
 - c. Incorporate board giving expectations as part of recruitment of new board members
3. Face-to-face visit with each new board member within three months of appointment
 - a. Review giving expectations
 - b. Discuss planned giving options (contingent bequest (J)
 - c. Review prospective solicitations they could assist with
4. Host events (and involve board members as presenters, hosts, etc.)
 - a. Annual planned giving society meal (induct new members)
 - b. Informal luncheons for prospective members
 - c. Estate Planning seminars

Planned Giving Ideas shared 8/6/24 with QC Planned Giving Council

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