

Esteemed Members Only (Webinar 15): Your Board Meeting



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May 12, 2021

Where We're Headed

- Why talk to your board
- Solicit, or merely brief
- Here's how solicitation looks
- If you solicit, you need your follow-up plan
- Let's talk



Why Talk To Your Board

- Set expectations accurately
- Acquaint them with Planned Giving
- Inform them of your plan
- Fill them in on your progress
- Get their buy-in
- See Resource page in Members site for sample PowerPoint
- To solicit?



Solicit, Or Merely Brief

Solicit en masse if

- You think you'll have some successes
- You want the gold standard: 100% participation
- Your board chair is on board & will endorse follow-up
- You're willing to do or manage the critical follow-up

If you solicit, a member testimonial is powerful

Brief if none of these apply

Here's How Solicitation Looks

As end to your briefing

1. We need your help, please consider including us in your will, or
1. We need you to include us in your will (for 100% participation)
2. We'll be following up with each of you individually
3. Testimonial from member PG donor
4. Chair: We'll be following up; I ask each of you to take the call, meeting, etc. Our participation is critical.



If You Solicit, You Need Your Follow-up Plan

- Who has the best relationship with each member
- Can you include fellow board members for peer solicitations
- How about including board members with gift commitments
- Have you got board members who can solicit peers alone
- Develop strategy for each board member
 - call; meeting; note; letter; next meeting or event
- Begin a week after the meeting

Esteemed Members

