Board Education

The review and approval by formal board resolution of the planned giving case statement should be a powerful educational experience for the board. Rather than passively listening to a presentation on the tax and income benefits of charitable trusts then moving placidly to the next agenda item, board members must face a new initiative that requires their approval and participation.

Much of the education should take place before the case statement ever makes it to the board room. Your planned giving committee writes the case draft then presents it to the development and finance committees, and then to the board. By the time the case reaches the board, some of key members will already have contributed to its revision and approved its goals. (For a more detailed description of this process, see *Using the Case* in *Getting Started)*

Board members will take the planned giving program personally and seriously only if it's presented to them personally and seriously. A thoughtful, attractively presented case serves notice that the planned giving program is a serious undertaking that requires board vision, leadership, and commitment.

Provide the board with a case statement draft in advance of the board meeting. Then take them through it at the meeting page-by-page. Staff can lead this tour of the case, but don't make the presentation unless you have at your side at least one volunteer board member who has made a planned gift commitment he or she will talk about publicly. After reviewing the case, have the volunteer talk briefly about why he or she made a planned gift commitment. I've seen volunteer presentations take no more than two minutes. The quality of attention in the room rises palpably. It's the part of the presentation the board remembers.

The board may then pass the case by formal resolution, or send it back for more work. Whichever they do, it's likely they have begun to understand that planned giving is a vital board responsibility, not a spectator sport.