

## **Planned Giving Advisory Committee**

### **Purpose:**

The purpose of the Planned Giving Advisory Committee is to advise the Lancaster General Health Foundation staff on opportunities to raise awareness and deepen the understanding of planned giving vehicles available to donors/prospects who wish to support Lancaster General Health through planned giving.

### **Committee Chair:**

The Chair of the Planned Giving Advisory Committee shall be a member of the LG Health Foundation Board of Trustees and shall serve a 2-year term. The Chair is appointed by the Chair of the LG Health Foundation Board of Trustees and will work with the LG Health Foundation staff to invite additional members to serve on the committee.

### **Membership:**

Members are appointed by the Planned Giving Advisory Committee with support from LG Health Foundation leadership. Membership will include both LGHF Board and non-Board members who are allied professionals.

### **Committee Member Expectations:**

- Serve as an advocate in the community for the Lancaster General Health Foundation by being knowledgeable about the Foundation, LG Health and its funding priorities.
- Act as an ambassador for the institution by connecting clients with an interest in making a planned gift to the Foundation in appropriate circumstances.
- Advise the LG Health Foundation on planned giving trends and ways to increase support through bequests and other planned giving vehicles.
- Help develop strategies to increase the 1893 Society membership (planned giving recognition society).
- Work with the Foundation staff to develop effective strategies for marketing planned giving vehicles
- Review and provide input on the Foundation's planned giving communication vehicles (planned giving newsletter, website, etc.)
- Present to Foundation volunteer groups about the benefits of planned giving vehicles
- Attend and actively participate in committee meetings
- Attend and support LG Health Foundation events as you are able

**Terms:** Planned Giving Advisory Committee members are appointed for a 3-year term and are eligible for an additional term as approved by the Planned Giving Advisory Committee Chair.

**Meetings:** This committee will meet 2-3 times a year.

**Reporting Relationship:** The Planned giving Advisory Committee reports to the LG Health Foundation Board of Trustees and takes direction from the LG Health Foundation's strategic plan.

**Staffing Relationship:** Managed by a senior member of the LG Health Foundation staff.

**Established:** January 1, 2014