

## Appendix A

### The Galactic Conservancy

#### Sample Trustee Orientation Planned Giving Outline

##### **1. Highlights**

- Money raised
- Nearly half of our fundraised support comes from deferred gifts.
- Last study showed average bequest was \$X

##### **2. Legacy Club**

- Purpose: to recognize and cultivate Planned Giving donors
- average Legacy Club bequest compared to our non-Legacy Club bequest average.
- Number of members in Legacy Club.

##### **3. Deferred gift goal**

- Share dollar goal for year or campaign.
- activity goal - Double the number of gift commitments during the year or campaign.  
8 year period

##### **4. Types of gifts accepted**

- Bequests (including retirement plan beneficiary designations)
- Gifts that provide lifetime income
- Real estate
- Life insurance policies
- Assist with more complicated outright gifts (closely held stock and other difficult to value property)
- Current major gifts such as donor advised funds, gifts from family foundations and IRA required mandatory distributions.

##### **5. Professional advisor program**

- Who – Estate planning attorneys, CPAs, Financial advisors
- Why – most gifts these days are happening w/o charity involvement
- Why – referral system for our donors
- Why- we get referrals from advisors, too
- How- individual meetings, then invited to events, trips, get pubs

##### **6. What board members can do to help**

- Consider including TNC in estate plan and join Legacy Club. Share how many Board Members have included the Conservancy in their estate plans.
- Be attentive in listening for gifting opportunities from others and listening for references to donors' assets such as real estate or appreciated stock
- Help with professional advisors
- Bring prospects on trips and to events

## Appendix B

### The Galactic Conservancy

#### Sample Trustee Legacy Ambassador Job Description

##### **Purpose**

The Trustee Legacy Ambassador plays a key role in The Galactic Conservancy's effort to promote Legacy Club involvement by current and former chapter trustees. The Trustee Legacy Ambassador should possess a genuine appreciation of the Conservancy, the ability to articulate its vision and plans, and the willingness, personally, to make a legacy gift to the Conservancy. The Trustee Legacy Ambassador should feel confident asking fellow trustees and former trustees to make a legacy gift commitment to The Galactic Conservancy. [S]he will work closely with Philanthropy staff that will provide support for this position.

##### **Objectives and Responsibilities**

- Make a personal, family and/or business legacy gift commitment to help establish a clear standard for others to follow.
- Encourage trustee participation by promoting chapter involvement in the Trustee Legacy Champions program (perhaps through setting an official board participation goal and/or a board resolution).
- Personally present the Conservancy's case for support to select individual trustees and former trustees and encourage all to make a legacy gift and join the Legacy Club.
- Recognize new trustee and former trustee Legacy Club members and assist in presentation of Legacy Club certificates and ribbons.
- Communicate progress on gift planning activities and new gifts at board meetings in concert with the philanthropy/marketing committee report.
- Augment staff acknowledgements with personal thank you calls and/or notes.
- Serve as the trustee spokesperson about the Legacy Club at chapter events when appropriate.

## Appendix C

### The Galactic Conservancy

#### Sample Trustee Legacy Ambassador Board Meeting Talking Points

##### The Galactic Conservancy - Board Meeting

###### Presentation on Launch of Trustee Legacy Ambassador Program

*By Trustee Judy Jetson*

- Many of you know that I have been a The Galactic Conservancy board member for over 20 years, and I enjoy sharing with others why I have invested in the work of The Galactic Conservancy.
- So in that spirit, I agreed to be recruited to lead Neptune's participation in the growing **Trustee Legacy Ambassador Program**.
- This program's goal is to increase trustee membership in the Legacy Club.
- The Legacy Club is TGC's special group of members who have made a planned gift of some kind to benefit the Conservancy, typically in the form of a bequest commitment or life-income gift.
- As a Legacy Club member myself, I am pleased to help promote this effort among fellow trustees to help secure the future of conservation on Neptune and beyond.
- Our Chapter's goal is to welcome at least 4 additional trustees to the Legacy Club this year.
- ***Thank you, thank you, thank you*** to our Trustees who are already in the Legacy Club:  
Dr. Ellie Arroway  
James T. Kirk  
Penny Robinson  
Flash Gordon  
Dr. Grace Augustine  
and Tony Stark
- Speaking of Tony, we have something for you! With appreciation on behalf of The Galactic Conservancy, I am pleased to present your official Legacy Club certificate welcoming you as our most recent Legacy Club trustee.
- The Galactic Conservancy's work lends itself well to leaving a legacy that will endure. These are significant gifts fund today's work as well as tomorrow's.
- In a major way, such commitments shape the future and potential of TGC's work. Over and over again, yesterday's plan becomes today's and tomorrow's crucial funding to help achieve our conservation goals.

- I look forward to being a resource to those of you who are in a position to consider a legacy to the Conservancy in your estate plans.
- We have a great staff of gift planning experts to draw upon as well; they are exceptional advisors on tax-wise planning and ways to achieve win/wins for donors and TGC.
- We understand that estate plans are very personal decisions.
- The Philanthropy staff and I will be in touch to see what may be appropriate for you to consider, and simply hope that *if* appropriate, you will join those of us in the Legacy Club who have committed to leaving a legacy for conservation to future generations.

## Appendix D

### The Galactic Conservancy

#### Sample Trustee Legacy Ambassador Plan of Action

#### **Neptune Trustee Legacy Ambassador Program**

##### **Background:**

As of May 31, 2012 the Neptune Chapter had the following Legacy Club involvement among its Trustees: 18 current Trustees, 6 Legacy Club members (33.33%).

This compared to a national average of 31.07% of current Trustees in the Legacy Club. The Conservancy's most involved Boards include Pluto at 100%, Mars at 79% and Earth at 68%.

##### **Key Players:**

Judy Jetson – Trustee Legacy Ambassador

Penny Potts – Associate Director of Donor Communications

Ellen Ripley – Senior Associate Director of Philanthropy

Dr. Dave Bowman – Director of Philanthropy

Han Solo – Regional Gift Planner

Sally Field – Trustee Legacy Ambassador Manager

##### **Objective:**

The Trustee Legacy Ambassador (TLA) program aims to build enthusiasm for the Conservancy's deferred giving program by increasing current and former Trustee participation in the Legacy Club through peer-to-peer promotion and solicitation.

The Trustee Legacy Champions (TLC) program recognizes any chapter Board that reaches 50%, 75%, or 100% Trustee involvement in the Legacy Club.

In FY' 13 we aim to increase Trustee Legacy Club membership by at least three new members to reach the 50% milestone. Through the end of the fiscal year, we aim to speak with 100% of trustees regarding Gift Planning.

#### **Implementation: July 2012-June 2013**

##### **October Board Retreat:**

- Attach Legacy Club ribbons to name tags
- Add Gift Planning "Moment" to Agenda
  - Judy to share introduction of Trustee Legacy Ambassador program.
  - Provide gift planning update
  - Ask a fellow trustee to share a testimonial about their support of the Conservancy

##### **Letter to Board: (late October/early November)**

- Sally to share letter samples
- Letter sent to all Board members from Judy

- Segmented based on reaction to/attendance at gift planning presentation
  - “I should/will” include TNC
  - No reaction to presentation
  - Absent from board meeting
  - Reiterates the importance of gift planning to TNC
  - States that individual follow-up from fundraisers will occur

**Personal Calls: (mid November)**

- Fundraisers/TLA to follow up on letter from Judy

**November Former Trustee Event**

- Legacy Club ribbons attached to name tags
- Judy to welcome guests and introduce herself
- Speak to the importance of Gift Planning at the Conservancy

**January Board Screening:**

- Complete Board Screening, to evaluate future prospects
- Han and Penny to lead.

**Future Board Meetings:**

- Legacy Club ribbons attached to name tags
- Celebrate new Legacy Club gifts
- New Legacy Club members give testimonial if comfortable/willing
- Story about the impact of deferred gifts shared –Neptune specific if possible

**Ambassador to initiate Gift Planning Conversations as appropriate: (*on-going*)**

- Judy to contact fellow trustees and put them in touch with staff regarding their plans.

**Addition of Gift Planning in Board Orientation: (*on-going*)**

- Inclusion in Roles & Goals to set expectation early on in term of service.

**Ongoing activity opportunities for Trustee Legacy Ambassador in Neptune**

**Engaging the Board**

- Present Legacy Club Certificates to Trustees at board meetings
- Give or recruit others to give testimonials
- Give or recruit others to give updates on planned gifts
- Solicit board members via letter
- Provide follow up to fellow trustees
- Refer Inquiries to staff

**Event Opportunities**

- Host/Attend Legacy Club events
- Speak at Conservancy events on behalf of TLA program.