

**Rudolf Steiner School of Ann Arbor  
Planned Giving Committee Mandate  
2023-24 School Year**

**Mission**

The purpose of the Planned Giving Committee is to further the advancement of the Endowment Fund and Stability Fund for the Rudolf Steiner School of Ann Arbor. The principle work of the committee entails a program of ongoing education about the RSSAA Endowment Program and Stability Fund with staff and members of the board; a strategic process of promoting the Endowment Fund to alumni, parents, extended family, and donors; a planned strategy to identify, cultivate, and enlist prospects into the Seyhan Ege Legacy Society.

**Objectives**

1. Prospect Identification, Cultivation and Solicitation
2. Stewardship
  - a. Education & Events
  - b. Recognition
  - c. Personal Contact
3. Marketing

**Membership**

All members of the Planned Giving Committee should be members of the Seyhan Ege Legacy Society. A member of the Board should sit on the committee. An RSSAA Development staff member and/or School Administrator shall sit on the Planned Giving Committee. This person should be a member of the Seyhan Ege Legacy Society. The staff and committee should recruit professional advisors as volunteers to assist the committee and staff with advice on planned gifts.

**Meetings**

Meetings of the Planned Giving Committee should be held quarterly.

**Reports**

Provide time on board meeting agenda's for endowment-related presentations a minimum of 2 to times per year.