



## Volunteer Position Description | Planned Giving Committee Member

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### **Pikes Peak Habitat for Humanity's mission:**

Seeking to put God's love into action, Pikes Peak Habitat for Humanity brings people together to build homes, communities, and hope.

### **Pikes Peak Habitat for Humanity Non-Proselytizing Policy**

Habitat for Humanity International (Habitat) and its affiliated organizations will not proselytize. Nor will Habitat work with entities or individuals who insist on proselytizing as part of their work with Habitat. This means that Habitat will not offer assistance on the expressed or implied condition that people must adhere to or convert to a particular faith or listen and respond to messaging designed to induce conversion to a particular faith.

### **Purpose**

The Planned Giving (PG) committee seeks to advise on the growth of Pikes Peak Habitat for Humanity's Planned Giving Program. The purpose of this committee is to assist Pikes Peak Habitat staff to implement and maintain a planned giving program for our affiliate – offering guidance and expertise relevant to the cultivation and stewardship of strong relationships with planned gift donors throughout El Paso County.

#### **Staff Advisor**

Abigail Hernandez  
Planned Giving Officer (PGO)  
719.475.7800 ext. 114  
[Abigail@pikespeakhabitat.org](mailto:Abigail@pikespeakhabitat.org)

#### **Chairman**

#### **Ex Officio Member**

Eric Stolp  
Pikes Peak Habitat Board  
President & Community  
Engagement Leader at Thrivent

### **Meeting Frequency**

Quarterly via Zoom – date and timing schedule to be determined according to member availability

### **Responsibilities**

- Develop familiarity with Pikes Peak Habitat's mission, vision, and budget, providing guidance as to tactics and required resources
- Work in partnership with the PGO to revise and refine the PG annual plan to further strengthen and develop Pikes Peak Habitat's PG program through a donor-centric approach
- Help to develop, deepen, and sustain local and corporate partnerships to help propel Pikes Peak Habitat's PG program
- Work towards developing and advising on key aspects of a Legacy Builders Society; a society of those who have planned legacy gifts with Pikes Peak Habitat for Humanity, which may also offer some benefits to its members (i.e. recognition)
- Help identify and recruit Legacy Builder Society members
- Work towards developing and advising on an annual signature event for Pikes Peak Habitat's Legacy Builders Society
- Partner with Pikes Peak Habitat staff as necessary for special projects, problem solving, and consultation
- Share ideas and best practices with staff and others on the committee. Prepare to speak up/ask questions/offer new ideas and alternatives as appropriate.



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- **Chair:** Devise meeting agendas (with staff liaison), chair and conduct committee meetings, review meeting minutes, represent Pikes Peak Habitat to the community at large, serve as a role model and leader among committee members, provide periodic status updates when requested to the Pikes Peak Habitat for Humanity Board, maintain a general knowledge of Pikes Peak Habitat's committee structures and operations.
- **PGO:** Act as liaison between the committee and Pikes Peak Habitat for Humanity, coordinate meeting and event logistics, create agenda (with Chair), maintain contact list, share meeting minutes with chair, provide logistical support to committee, occasionally provide periodic status updates of the PG committee as needed, educate committee on Pikes Peak Habitat programs and policies

### Expectations

- Members are expected to attend and actively contribute to all meetings and occasional communications, including notifying the chair of any planned absences and following up with them for a recap and any action items
- Be good ambassadors for Pikes Peak Habitat and promote its mission
- Be willing to share Pikes Peak Habitat's story with others
- Friendliness, a positive attitude, and a willingness to work toward ensuring the success of the PG program of Pikes Peak Habitat for Humanity
- Have a passion for permanent and affordable housing programs throughout El Paso County
- Make the appropriate time commitment to attend and participate in meetings, with additional time as required for preparation and special projects

### Qualifications

- Must be 18 years or over in age
- Outside knowledge and expertise relevant to planned gifts, i.e., bequests, appreciated securities, life insurance, real estate, personal property, retirement funds, qualified charitable distributions, charitable gift annuities, and charitable remainder trusts is preferred
- Experience with PG or a PG donor at another organization

### Training

- Orientation to Pikes Peak Habitat and the Planned Giving program.

### Benefits to You

- Work with community members to ensure El Paso County's workforce families have opportunities to secure or maintain safe, permanent, and affordable housing now and in the future
- Assist in promoting a future revenue stream for Pikes Peak Habitat to ensure long-term stability

### Recruitment

- Those interested in serving on the Planned Giving Committee must submit a completed [Volunteer Committee Application form](#) to the chair
  - Committee chair is approved by the Governance Committee Chair and PGO
  - Committee members are approved by Planned Giving Committee Chair and PGO