

**To:** Ken Sorenson, SSA Chair  
**CC:** Planned Giving Committee  
**From:** John Godfrey, Chair  
**Subject:** Committee Report for March 2<sup>nd</sup>/3<sup>rd</sup> , 2018 SSA BOD meeting  
**Date:** February 18, 2018

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**1. Completed Items**

- Junior-centric Nov Soaring which resulted in \$100K spontaneous estate pledge
- Establishment of Society of Eagles and Recognition levels
- Promotion for Club Class Trophies
- Adjustment of Eagle Fund Giving levels
- Re-layout of Eagle Fund acknowledgement page for Soaring with SOE header
- Promotion of Juniors with "Ways to Give" collateral
- Creation and inclusion of SOE pledge solicitation in March Soaring
- Materials for US Team Solicitation of 300K for Jr. UST endowment

**2. Ongoing Items**

- Creation of historical database of donors. This project has not made the expected progress and will need to be reevaluated
- Final selection of vendor for the planned giving website, mailings and e-newsletters
- Introduction of prominent giving umbrella pages on SSA website along with "Give Now" capability and payment processing.

**3. Acknowledgements**

- Denise Layton, Steve Hines for production of collateral at a very busy time
- Bob Fletcher, for solicitation and closing of pledges from UST Committee members

Respectfully submitted,  
John Godfrey (QT), Chair