



## **PHILANTHROPIC SERVICES COMMITTEE**

### **Purpose**

To assist in growing the CFMC by helping to establish and monitor the implementation of the resource development plan.

### **Committee Composition**

The Committee shall consist of a minimum of five members of the CFMC Board of Directors, including the Board chair. Non-board members are welcome on the Committee but shall not comprise a majority. It is important that Committee membership be representative of the major regions within Monterey County.

### **Duties and Responsibilities**

The Resource Development Committee provides oversight and input on resource development, donor services, donor-related events, and donor-related public relations and marketing activities. This includes, but is not limited to:

- Provide input and oversight on the CFMC's resource development plan. This may incorporate strategies on reaching out to individuals, corporations, professional advisors (estate planning attorneys, wealth managers, CPAs, etc.), private foundations and other interested parties.
- Provide feedback on the annual marketing plan in support of the CFMC public relations and marketing goals.
- Assistance and advice in planning and carrying out donor-related events (Celebration of Philanthropy, Legacy Society, professional advisor programs, etc.) and supporting organizational activities as deemed necessary by the Board of Directors and the president/CEO.
- Assist staff in identifying prospects.
- Actively encourage and support other CFMC Board Members to be resource development ambassadors, and help identify prospects whose names can be provided to staff. When appropriate, committee and Board members may help organize meetings or lunches with prospects and professional advisors.

### **Committee Process**

- At regularly scheduled meetings or special meetings called by the Chair, the Committee develops recommendations by consensus.
- Committee recommendations are forwarded to the CFMC Board of Directors.

### **Committee Meetings**

The Committee will meet quarterly or as needed.