

Committee on Planned Giving – Member Overview & Expectations

Purpose of the Committee

The Committee on Planned Giving is the diocesan working group charged with designing, advocating for, and implementing the creation of a permanent Commission on Planned Giving for the Episcopal Diocese of Hawai'i. This work strengthens long-term stewardship, supports congregations and ministries, and builds a sustainable foundation for future mission.

Members help shape diocesan policy, expand legacy giving, and ensure that planned giving becomes a vibrant, accessible, and spiritually grounded part of diocesan life.

What a Committee Member Should Expect

1. A Collaborative, Diocese-Wide Effort

Members serve alongside representatives from every major island and territory—Hawai'i Island, Maui/Moloka'i, O'ahu, Kaua'i, and Guam/Saipan—ensuring that the committee reflects the diversity of the diocese. Meetings will be held monthly or bi-monthly.

2. A Clear, Phased Work Plan (2025–2026)

Members participate in a structured timeline that includes:

- Orientation & formation (Dec–Feb)
- Assessment & stakeholder engagement (Mar–May)
- Drafting canonical amendments & policies (June)
- Consultation & revision (July)
- Submission & advocacy (August)
- Convention presentations & Q&A (October)
- Post-Convention implementation (November onward)

3. Engagement with Leaders & Experts

Members will interact with:

- The Bishop and diocesan leadership
- The Standing Committee and Chancellor

- The Episcopal Church Foundation (ECF)
- Local philanthropic partners and estate-planning professionals

This includes reviewing best practices, attending workshops, and helping shape diocesan-wide training.

4. Review of Policies, Materials & Communications

Members help evaluate and refresh:

- Gift acceptance policies
- Investment and donor-privacy guidelines
- Legacy Society materials
- Brochures, digital content, and parish-level resources

This includes ensuring materials are culturally relevant, visually updated, and accessible across islands.

5. Participation in Donor Engagement & Legacy Society Renewal

Members support:

- Legacy Society lunches with the Bishop
- Recognition events
- Storytelling and donor-impact communications
- Parish-level legacy society development

What a Committee Member Contributes

1. Regional Insight & Representation

Members bring knowledge of their island's culture, needs, and donor landscape, ensuring diocesan policies and messaging resonate locally.

2. Skills & Expertise

While not required, members with backgrounds in law, finance, fundraising, communications, or estate planning provide valuable insight. All members contribute thoughtful judgment, pastoral sensitivity, and a commitment to stewardship.

3. Policy & Governance Input

Members help:

- Draft constitutional and canonical amendments
- Review legal and procedural language
- Provide feedback on governance structures
- Prepare materials for Diocesan Convention

4. Advocacy & Education

Members serve as ambassadors for planned giving by:

- Encouraging clergy and lay leaders to engage in legacy conversations
- Supporting parish-level training
- Promoting planned giving as a spiritual practice, not just a financial tool

5. Commitment to Ethical Stewardship

Members uphold principles of transparency, donor confidentiality, and theological grounding, ensuring the program reflects the values of the Episcopal Church.

The Impact of Serving

Committee members help build a legacy that will sustain:

- Congregations
- Camp Mokulē'ia
- Diocesan schools
- Outreach ministries
- Future generations of Episcopalians in Hawai'i

Your service shapes the long-term financial and spiritual health of the diocese