



Notes and Minutes from 10/10/18 Legacy Committee Meeting

1. We recognized that we now have **16 individuals or families** who have made their Legacy Commitment to First Parish and are now member of the Legacy Circle. We receive 7 Legacy forms in 2017 and 9 in 2018.
2. We decided to **host a “Conversation with the Legacy Circle Members”** on (tentative) Saturday, December 1st, 2018 at Tom Wilson and Martha Soper’s house. It will be simple wine/refreshments, simple snacks, and will be an opportunity to both thank the members and engaged them in a discussion about the First Parish Legacy Program. The discussion questions may include:
 - a. What was it that spoke to you about making a legacy commitment to First Parish?
 - b. How might we encourage or get other people to do the same?
 - c. Are there any suggestions for improving how we conduct the Legacy Program?

We will also invite Michele Fortier, Treasurer and John Boynton, member of the Trustees to participate in the “Conversation.” Also, we will invite Fifi Ball (but she does not need to attend) and Marion Visel, Minister to participate as well. Also, Philip will provide a 1 page summary of the current Legacy Investment Fund summary that he prepares for the Trustees and will give the group a brief overview of how the investments are handled.

3. We decided to **host a Forum event** on the First Parish Legacy Program and use this as a panel discussion of members who have already made the commitment. Laura was able to determine that the Forum has an open spot on **Sunday, December 2** and so that will be the date. They will be asked to make a short (5 minute) statement that examines 3 questions:
 - a. Why did you do this?
 - b. How did you do this? (We’re looking for a variety of approaches to showcase)
 - c. How did you feel after you did this action? What is your sense now this has been done?

Tom will ask the following people to see if they would be interested and available for doing this. They are:

- ✓ Janet Bailey (and Bob Brack)
- ✓ Doug Hardy and Roselyn Romberg
- ✓ Toby Smith Ropeik and David Ropeik

- ✓ Darien Smith
- ✓ Eric and Laurie Van Loon

Tom will moderate. We'll have a brief presentation by each of these people then open this up for discussion, questions, and exploration of alternative ways of doing this.

Laura and Tom will work on the publicity. They will develop a piece in the Meeting House News, one for 3-4 weeks in the Sunday News (Nov. 11, Nov. 18, Nov 25 (Thanksgiving weekend), and Dec. 2nd). We will also do an announcement in the FP Weekly Calendar.

4. Following these programs, sometime in January or February, we will have a **follow up meeting of the Legacy Committee to review our legacy program and identify any areas that need improvement**. We will discuss the ideas suggested by the Circle discussion and reflecting on the Forum discussion. We will also invite people who are important resources to the group. These people include George Gagliardi, Lindsay Kafka, and Dinny McIntyre. Others may be invited as well. Tom will reach out and schedule this meeting with the Committee.
5. We reviewed **the brochure** and felt that the names were generic enough that it did not need modification. Fifi will be responsible for printing more for the Forum event on Dec. 2.
6. We also talked about **membership of the Committee**. Each person decided they wanted to stay on the Committee and felt in was an important Committee and did not require any special burden to participate. We also felt that there was no need to add members at this time. If someone who has a particular expertise in development, legacy programs, etc., wanted to get involved, we would be very open and encourage the decision to expand the group. No change appears to be needed at this time.
7. With Laura's encouragement, Tom will prepare a brief **Annual Report for the Legacy Committee** for 2018. Fifi will take responsibility to getting it into the "records" for the Church. Patty reminded us that sometimes it is important to have some institution memory.
8. We ended the meeting at 9:50 (**10 minutes ahead of our schedule**).

Attending were: Fifi Ball, Philip vanderWilden, Tom Wilson, Laura Bernstein, and Patty Popov. Missing were Fred Van Deusen. Michele Fortier is also always welcomed but could not attend.