# **Appendix A: Planned giving society development and implementation checklist**

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| Task | Complete | In progress | N/​A |
| Determine interest in exploring the possibility of a planned giving society. |  |  |  |
| Plan a meeting for reviewing existing development and fundraising efforts. |  |  |  |
| Analyze existing development and fundraising efforts. |  |  |  |
| Identify who is responsible for development efforts and the current capacity. |  |  |  |
| Analyze existing planned gifts and endowments. |  |  |  |
| Host a meeting to discuss readiness for a planned giving society. |  |  |  |
| Gain support from the pastor and/​or governing body to formally explore establishing a planned giving society. |  |  |  |
| Determine how the planned giving society fits into the school’s strategic plan. |  |  |  |
| Ensure there is a development committee or planned giving task force in place to guide the effort. |  |  |  |
| Study the annual fund’s effectiveness and available giving records. |  |  |  |
| Discuss the school’s current alumni and friends database or come up with another method for keeping records. |  |  |  |
| Identify who will be responsible for planned giving and determine how much time will be spent on this. |  |  |  |
| Decide whether your school is ready to begin gathering support for a planned giving society or determine if there are other priorities that need to be in place first. |  |  |  |
| Ensure support from the pastor and/​or governing body to move forward with a planned giving society. |  |  |  |
| Begin learning about the different types of planned giving vehicles and endowments. |  |  |  |
| Talk to donors about the possibility of establishing a planned giving society and seek their input. |  |  |  |
| Develop a planned giving committee to guide the effort and provide expertise on planned giving vehicles. |  |  |  |
| Determine who will be responsible for managing endowments. |  |  |  |
| Identify how staff and volunteers will support and implement the planned giving program. |  |  |  |
| Establish a gift acceptance policy that is approved by the pastor and/​or governing body. |  |  |  |
| Set goals for the first few years of the planned giving society. |  |  |  |
| Name and brand the planned giving society. |  |  |  |
| Create membership requirements for the society. |  |  |  |
| Develop print and digital materials to promote the society. |  |  |  |
| Decide how the society will be communicated to prospects throughout the year. |  |  |  |
| Include a planned giving checkbox on the annual fund solicitation. |  |  |  |
| Communicate a charter membership opportunity for the first planned giving society members. Include a deadline. |  |  |  |
| Plan the first planned giving society event. |  |  |  |
| Determine how society members will be recognized publicly and privately. |  |  |  |
| Identify top prospects for planned giving. |  |  |  |
| Cultivate relationships with top prospects. |  |  |  |
| Solicit top prospects for planned gifts. |  |  |  |
| Acknowledge planned gifts. |  |  |  |
| Invite charter members and top prospects to the planned giving society event. |  |  |  |
| Host the first planned giving society meeting. |  |  |  |
| Follow up with planned giving society attendees and those who expressed interest but couldn’t attend. |  |  |  |
| Review goals and progress. |  |  |  |
| Make adjustments for year two. |  |  |  |