# **Appendix C: Sample meeting agenda to discuss planned giving society readiness**

**Prayer**

**Support:** Do we have support for a planned giving society from the governing body and/​or pastor?

**Strategic plan:** Does our strategic plan have a goal related to planned giving?

**Development committee:** What is the status of having a development committee to oversee the planned giving society rollout? How can a development committee be meaningfully involved?

**Annual fund:** How successful is our annual fund effort? Is it the center of all annual development efforts?

**Database/​donor giving records:** What kind of database or record keeping system is in place for development? How accurate are the records?

**Responsibility:** Who will be responsible for the planned giving society’s work?

**Readiness:** Discuss readiness for establishing a planned giving society

**Next steps:**