



# DEVELOPING AN ANNUAL PLANNING CYCLE

One of the ways you can keep your board discussing important (PROTECT) issues in a regular and systematized way is to develop an annual planning cycle.

- STEP ONE** Create a list of all activities and responsibilities that happen over the course of a year.
- STEP TWO** Slot the tasks that are time specific and include any non-time specific.
- STEP THREE** As a group, review the cycle and see if there are times of the year when there are too many things on the calendar. Consider make adjustments to the timing to balance things out.

| ANNUAL PLANNING CYCLE |                   |                |
|-----------------------|-------------------|----------------|
| Timeline              | Process / Product | Responsibility |
| January               |                   |                |
| February              |                   |                |
| March                 |                   |                |
| April                 |                   |                |
| May                   |                   |                |
| June                  |                   |                |

|           |  |  |
|-----------|--|--|
| July      |  |  |
| August    |  |  |
| September |  |  |
| October   |  |  |
| November  |  |  |
| December  |  |  |

**Group Reflection:**

What is one area or item was can pray for as we develop an annual cycle?

**Personal Reflection:**

How has this exercise impacted you specifically?

## Sample

| ANNUAL PLANNING CYCLE |  |   |
|-----------------------|--|---|
| Timeline              | Process / Product  | Responsibility  |
| January               | -Budget ready for congregational meeting   | -Treasurer / Finance Team                                       |
| February              | -Congregational Meeting (2nd Sunday)<br>-T4's to Employees<br>-Tax Receipts  | -Chair of Board of Directors<br>-Treasurer<br>-Envelope Steward |
| March                 | -Nominating Discussions<br>-Send out requests for Annual Report Submissions  | -Board of Directors<br>-Administrator                           |
| April                 | -Annual Report Preparation   | -Administrator  |
| May                   | -AGM Meeting   | -Board of Directors Chair & Clerk                               |
| June                  | -Start of new officers and team members<br>-File annual Charity return to Canada Revenue Agency on or before June 30 | -Treasurer  |
| July                  |  |   |
| August                |  |   |
| September             | -Sunday School Teachers and <i>Plan to Protect</i> Training  | Ministry Staff  |
| October               | -Preliminary Budget Priority Discussions<br>-Review Insurance Policy   | Board of Directors and Finance Team                             |
| November              | -Preparing Budget and Strategic Priorities<br>-Anniversary Service   | Board of Directors and Finance Team<br>Ministry Staff           |
| December              | -Candle Light Service<br>-Christmas Pageant<br>-Christmas Eve Service<br>-Financial Year End (Dec. 31)               | Ministry Staff<br>Ministry Staff<br>Ministry Staff              |