



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) -T4's to Employees -Tax Receipts	-Chair of Board of Directors -Treasurer -Envelope Steward
March	-Nominating Discussions -Send out requests for Annual Report Submissions	-Board of Directors -Administrator
April	-Annual Report Preparation	-Administrator
May	-AGM Meeting	-Board of Directors Chair & Clerk
June	-Start of new officers and team members -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 -Review Insurance Policy	Board of Directors and Finance Team
November	-Preparing Budget and Strategic Priorities -Anniversary Service	Board of Directors and Finance Team Ministry Staff
December	-Candle Light Service -Christmas Pageant -Christmas Eve Service -Financial Year End (Dec. 31)	Ministry Staff Ministry Staff Ministry Staff

