

VI. BUDGET PREPARATION

The Operations Team shall plan and implement the budget development process, working with the Financial Oversight Committee and principal staff. The Operations Team shall plan this work to meet the budget deadlines set out below.

August	Board	sets the date for a Congregational Meeting next May
	Board	appoints a task force to <ul style="list-style-type: none">• bring initial budget recommendations to September Board retreat• attend all relevant meetings below• communicate regularly with Op Team, Financial Oversight, HR, and Stewardship• report on costs and benefits of major budget goals (in January)
September	Stewardship	sets canvass dates for next spring
	Board	holds a retreat to brainstorm financial and organizational goals
October	Board	identifies major budget goals for further review by its task force
November	HR	recommends major goals re salary/benefits/staffing
	Op Team	solicits input from all committees re next year's budget
	Op Team	begins to advertise a date in January for congregational input re major budget goals
January	HR	makes final budget recommendation re salaries/benefits/staffing
	Op Team	holds meeting to receive congregational input about <i>major goals</i> for the upcoming canvass (a second meeting soliciting input about the Op Team's actual budget recommendation to be held in March)
	Task Force	reports on costs and benefits of major budget goals
	Board	chooses major budget goals, communicates these to Operations Team, Financial Oversight, Human Resources and Stewardship
February	Op Team	provides their first budget draft to the Board (which may include more expense than income)
	Op Team	begins to advertise a date in March to receive congregational input on their first budget draft
March	Stewardship	begins the canvass
	Op Team	holds meeting to receive congregational input on their first budget draft
	Fin Oversight	provides comments/suggestions on the Op Team's first draft

April (extra Board budget meeting)

	Stewardship	provides initial pledge income estimate to Op Team by April 1 and then weekly
	Op Team	provides their final budget recommendation (not necessarily balanced)
	Board	attempts to balance/finalize budget
April	Board	finalizes their budget recommendation to the congregation
	Board	arranges to have their final recommendation made available to the Congregation two weeks in advance of the Congregational Meeting
May (Cong Meeting)	Treasurer	presents Board's final budget recommendation to the Congregation