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| **FY26: Draft Budget Development and Pledge Campaign Timeline (2025-26) Theme : Writing Our Next Chapter Together** | | | | |
| **Event** | **Date** | **Action/Resp.** | **Accountability/Who** |  |
| Pledge Team Informal Meeting | October, 2024 | Discuss Theme  Upgrade timeline | Linda, Kent, Heather< other team members |  |
| Pledge Team Organizational meeting | 11/12/24 | Questions: Do you continue with second Tuesday ? 1 PM  Review of Tasks & Timeline  Who should be on point? | All team Members  Agreement - second Tuesday 1 PM on Zoom |  |
| Review plan and timeline with Finance Committee | 11/12/24 | Get Approval for theme and time line | Linda to FC |  |
| Find artist for church display /visual | 12/4/24 |  | Lisa (Rick) |  |
| Create Outline for brochure so content creation can be assigned | 12/09/24 |  | Lisa |  |
| Create Communications Plan | 12/10/24 |  | Linda/Donna to be approved by PT 12/10 meeting |  |
| PT Team meeting | 12/10/24 | review communications plan  Discuss how to incorporate “book”idea into entire pledge campaign  discuss pledge team assignments for tasks during March campaign | Linda/ All PT members |  |
| Meet with Board on pledge campaign and budget process | 12/10/24 | Generally, the early December meeting | PC chair, RW |  |
| Update FC with PT progress | 12/11/24 | artwork for church, brochure | Linda & brochure lead |  |
| Brief F.C. on budget development process | 12/11/24 | PT, RW |  |  |
| Meet with communications to finalize communications plan | by 12/15/24 | audiences, medium, - social media, text, newsletters, brochure | members of PT and communications team |  |
| Review expense categories | 12/18/24 | Kent, RW |  |  |
| Distribute estimate sheets to committee chairs | 1/3/25 | RW |  |  |
| PT Meeting | 1/14/25 | discuss communications needs - speakers at church(testimonials), phone calls, letters thanking former pledgers | Linda, Full Committee |  |
| Receive staff salary input | 1/17/25 | RW |  |  |
| Committees return estimate sheets | 1/18/25 | To RW |  |  |
| Income budget input | 1/18/25 | Kent, FundRaising chair, Rental (ET) |  |  |
| BOT to provide input to brochure - FY26 goals and targets | 1/22/25 | BOT to PT | BOT |  |
| Receive minister salary input | 1/25/25 | Rev. Heather, Paul, RW |  |  |
| Final input to brochure/website for pledge | 1/27/25 |  | Various - Lisa on point |  |
| Complete brochure, and pledge form (website and hardcopy) and webpage content update | 2/5/25 | PT: Brochure does not contain budget numbers; only words to ‘give generously’ | Lisa  need to point out date to Communications Team for brochure publishing and being ready by 3/1 |  |
| Announce information session on budget | 2/1-2/10 |  |  |  |
| Information Session after service on budgeting process | 2/10 |  |  |  |
| FC Budget review | 2/07/25 | FC review of Phase 1 budget | PT, RW |  |
| BOT Review and Approval of Pledge Goal and Budget | 2/13/25 | Budget approved at BOT Meeting | PT, RW |  |
| Design communications announcing pledge drive - why we need pledges | Feb | Take advice from Communications Team | Pledge member with approval of content from PT and FC |  |
| PT Team Meeting | 2/11/25 | Create Follow up Callers | full team |  |
| Soft Launch to BOT and Church Council Members | by 2/13/25 | A joint meeting with the BOT and CC to initiate pledge campaign with the leadership | (CC is Church Council) |  |
| Draft key points for testimonials | 2/15 |  |  |  |
| Identify testimonial speakers | 2/15 |  |  |  |
| Announce pledge campaign and announce technology session on how to pledge | 2/15 |  |  |  |
| Invite for early pledges with leadership - BOT and CC | 2/18/25 |  | PT |  |
| Begin thank you contacts | 2/19/25 | By email and phone calls | PT |  |
| Conduct technology session | 2/27 |  |  |  |
| Print brochure | 2/28 |  |  |  |
| Pledge Package email, and mailing where needed, to Members/Friends | by 3/2/25 | PT |  |  |
| Visual to Monitor Progress | by 3/3/25 |  | Church member; has been Rick Welk in the past |  |
| March 2 Service – Public Kick off | 3/02/25 | Rev. Heather sermon, and Testimonial  1st Sunday of each month, please check: is BarB available & does that Sunday work for post-service Membership Book signing? (if so, announce!) | “Community IS Co-Creation” “We support what we create.” – Meg Wheatley, Who Do We Choose To Be?, p130 / Human organizations exist because human beings commit to fueling them, in all the ways….  “Living into the Future”? drawing upon Searching for the Future Strategic Plan, where we’re at and hoping to go? resurfacing that plan at this point in the 1st year? |  |
| March 9 Service | 3/9/25 | Testimonial |  |  |
| March 16 Service | 3/16/25 | Testimonial |  |  |
| PC Meeting | 3/11/25 |  |  |  |
| March 23 Service | 3/23/25 | Testimonial |  |  |
| March 30 Service | 3/30/25 | Chair / Co-Chair communicate results |  |  |
| Call members who have not yet pledged | 3/25/25-4/14/25 | PT |  |  |
| Clean up and close off campaign | 4/02/25  4/09/25 | PT |  |  |
| PT Meeting | 4/8/25 |  |  |  |
| Finalize Pledge Amount for final budget development | 4/15/25 | PT, RW |  |  |
| Reconcile final pledge amount with budget | 4/16/25 – 4/21/25 | Kent, RW |  |  |
| PT Meeting | 4/22/25 | Possible extra meeting? |  |  |
| F.C. review and approval of the Phase II Budget | 4/22/25 | Kent, RW |  |  |
| BOT Review and Approval of the Phase II Budget | 4/24/25 | Kent, RW |  |  |
| Budget to Comm. For distribution | 5/7/25 | RW |  |  |
| PT meeting | 5/13/25 | Conduct a post-pledge - what to improve, what went well (start, stop, continue) |  |  |
| Congregation Information Session | 6/2/25 | PT, RW |  |  |
| Congregation Annual meeting | 6/9/25 | PT, RW |  |  |
| Possible PT meeting | 6/10/25 |  |  |  |