PCB Finance/Stewardship Committee Goals

Goal: Successful Funding of Yearly Operating Budget

One-Year Goal: Develop and implement a plan for stewardship which successfully funds the operating budget adopted by the session.

SMART Assessment:

1. Specific. Develop a plan for stewardship which includes:

- Timely interaction with session about development of responsible 2025 operating budget in line with realistic revenue projections;
- Use existing sources of revenue available from PCB funds as a potential source of revenue for PCB;
- Communicate to congregation budget determinations and priorities;
- Establish dates for commencement and duration of campaign;
- Establish necessity for & reasonableness of required individual pledge percentage increases;
- Use written solicitations and tailor communications to recipients (e.g. those who do not historically pledge or contribute);
- Establish appropriate "theme" for campaign;
- Establish extent, nature, and timing of electronic communications;
- Establish the extent, nature and timing of oral communications to congregation (e.g. "minute for stewardship");
- Establish the extent and nature of person-to-person communication;
- Establish timing for up-date communications to congregation and to session;
- Establish & communicate multiple contribution platforms to the congregation such as QCD and "appreciated stock" contribution methods;
- Research third-party solicitation materials;
- Expand utilization of non-committee members for input in planning and participation in campaign;
- Expand utilization of data concerning individual prior participation levels (e.g. for enhanced levels of communication);

- Establish guidelines for and timing of “secondary campaign” if the situation warrants a “second campaign.”
- Develop a system & method of communication to the congregation revolving around Stewardship throughout the course of the year.

2. **Measurable:** Development of plan prior to commencement of campaign.

3. **Achievable:** Implementation of plan prior to and during campaign.

4. **Relevant:** Successful funding of reasonable operating budget is essential for the financial health of PCB.

5. **Time-Bound:** Plan to be in place prior to commencement of funding campaign.

PCB Finance/Stewardship Goals

Goal: Successful Funding of Yearly Operating Budget

Two-Year Goal: Continue implementation of any experience-based changes or additions to the “Specific” items identified in the “One-Year Goal” plan.

1. **Specific.** Review adequacy of “Specific” items identified in the “one-year goal” and implement any experience-based changes as necessary and appropriate.

2. **Measurable.** Develop a plan for review of the implementation of the prior year plan for stewardship and assure consistency with any experience-based changes or modifications.

3. **Achievable.** Implementation of plan as revised, if necessary, prior to and during campaign.

4. **Relevant.** Successful funding of reasonable operating budget is essential for the financial health of PCB.

5. **Time-Bound**. Plan to be in place prior to commencement of funding campaign.

PCB Finance/Stewardship Goals

Goal: Successful Funding of Yearly Operating Budget

Three-Year Goal: Continue implementation of any experience-based changes or additions to the "Specific" items identified in the "One-Year Goal" plan as revised in "Two-Year Goal."

1. **Specific:** Review adequacy of "Specific" items identified in the "one-year goal" as revised in "Two-Year Goal" and implement any experience-based changes as necessary and appropriate.

2. **Measurable:** Develop a plan for review of the implementation of the prior year plan for stewardship and assure consistency with any experience-based changes or modifications.

3. **Achievable:** Implementation of plan as revised, if necessary, prior to and during campaign.

4. **Relevant:** Successful funding of reasonable operating budget is essential for the financial health of PCB.

5. **Time-Bound**: Plan to be in place prior to commencement of funding campaign.