

Implementation

Time-Sensitive Discernment

Ongoing

Establishing and investing in designated **endowments as carriers for vision & mission** (S, AG, FC, C&A)

Annual Funding Priorities Cycle: making existing practice and process more visible, intentional, inviting (C&A)

Annual Budget Process, including multi-year projections to aid planning (FC, S)

Planned giving; cultivating, inviting, and stewarding estate gifts (S, P)

Sessions visioning & design, as relates to financial stewardship, sustainability, and opportunity costs/tradeoffs (WG)

Nurturing a spirituality of stewardship: How can Friends approach personal and corporate decisions about money and financial stewardship in ways informed by our faith? (S, P)

CPA review: making financial management and reporting more transparent, share more helpful information to inform discernment (WG, S, P, FC)

Support of Other Organizations in operating budget: Criteria? Which orgs, and how much? (WG)

Local meeting discernment regarding care, stewardship, and uses of meetinghouses and property - how this fits into ongoing programming (S, P)

Financial resilience and strengthening: development including annual fund (gifts from households and meetings) and other diversified streams (S, AG)

Evaluation and Discernment of **Experiment with Stipends for Volunteer Leadership** (WG)

Local meeting financial stewardship: wisdom sharing and workshops/resource sharing - how this fits into ongoing programming (S, P)

*FC: Finance Committee
C&A: Coordinating & Advisory
WG: Dedicated working group
S: Staff
AG: Relevant advisory group
LG: Legacy Gift Committee
YM: Youth Ministries Committee
P: Other partners (Everence, CPA)*

Review, Editing, and Approval of **revised Personnel Policy** for NEYM (S, AG, C&A)

Youth Ministries listening, consultation, and reporting, as relates to programmatic approaches, staffing, participants, financial stewardship, sustainability, and opportunity costs (S, YM)

Reflection on past uses (LG), and **discernment process on future use** (*TBD/C&A), of **Legacy Gift Funds**

Revised 4/19/24