

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 4/2024