

Calendar Planning Worksheet

- Fixed dates and deadlines to be aware of and enter
 - Parochial Report
 - Start working on in January or very early February after books are closed
 - Audit
 - Due no later than September 30th
 - Annual Meeting
 - Annual Meeting nominating committee needs time to do its work (is there a timeline or other requirements for that in your by-laws). What if you need to change your by-laws?
 - Pledge Campaign launch and Ingathering Date
 - Parish Budget process and Cost of Living Adjustments (COLA) for clergy and other employees
 - Federal Holidays
 - Regular clergy days off and vacations (when known)
- Variable dates (examples)
 - Ash Wednesday
 - Lent
 - Periodic regulatory Items such as filing property tax exemption forms, boiler inspection, etc.
 - Diocesan Convention
 - Nov 8-9, 2024 (150th Anniversary)
 - Diocesan-wide events (<https://dioceseofnewark.org/calendar>)
 - Scheduling conflicts may happen and need to be accounted for. Example: Someone is on Diocesan Council AND Vestry and the meetings are on the same night.
 - Diocesan Grant and Scholarship deadlines (<https://dioceseofnewark.org/funding>)
 - Camp dates
 - UBE breakfast and other events
 - Regional Ministry Network meetings
 - Parish events
 - Parish Saint/Feast Day Celebrations
 - Regional Confirmation registration (announced in VoiceOnline)
 - Sales or fundraisers, including prep time (*Reminder:no gambling)
- Other things to consider while planning:
 - Read *The Voice* to add Diocesan events as they are announced
 - School vacation days for the district the church is situated in and/or for the schools children in the parish tend to attend
 - Major parish anniversaries

- Once you have all or most of those things entered or mapped out, you can start to look at other things and how the above impacts, shifts, etc.
 - Stewardship events and annual pledge campaign
 - Lenten programs
 - All ages Christian Formation
 - Special Events and Concerts
 - Community ministry events, mission trips, parish retreat
 - Strategic Planning processes or capital campaigns
 - Timing of actual capital project work (new roof) or repairs
 - Regular Team or Committee meetings, other regular things such as Choir or Youth Group
- Items that might need to be updated yearly:
 - Building inspections
 - Major repairs and/or tune-ups that need to be scheduled?
 - Mutual Ministry Reviews
 - Clergy Letter of Agreement
 - Lingered “we really need to do that this year’s” that need to be mapped out? Example safety plan; revise mission statement, etc.
 - Licenses or trainings that expire
 - Tax exempt status with town
 - Property tax exemption renewal (every 3 years)
 - Lease agreement
- Items that might need to be updated regularly:
 - Outgoing phone message
 - Newsletter deadline and “publication” schedule
 - Sending out Vestry agenda
- Final things to consider when planning:
 - How far in advance does work need to begin?
 - How far in advance do personnel to do the work need to be recruited?
 - Is there a Vestry liaison? Is there a ministry job description?
 - Is there a process for clergy and/or wardens to be updated?
 - Is there a communication timeline and strategy? Does it include updating social media websites and signs? Who does that and how is it coordinated?
 - What is your timeline and plan for gathering and entering all this information?
 - Schedule Parish Leader and Stakeholder conversations.
 - Who updates the calendar and how will they know to do that?
 - Do room assignments need to be noted?
 - How are items such as Certificate of Insurance or Temporary Liquor License Checked and filed? Is there a binder?
 - Is there a schedule for annual insurance review, re-bidding regular vendors, or reviewing contracts? Lease reviews and renewals (with Standing Committee approval)? Staff annual reviews and/or revising of job descriptions?
 - Is something dominating the schedule too much?
 - Is there a good balance between mission and ministry activities and practical things such as fundraisers, or tending to building
 - Is there a good balance between activities/aimed inward & outward ministries