

BEST PRACTICES ANNUAL PLANNING WORKSHEET

Determine which best practices you will schedule, research, initiate, and/or implement in your church.

Best Practices...	See:	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
TEACHING		* = Good month to consider doing.											
SS Classes \$ Curriculum	1	*	*	*	*	*				*	*	*	
\$ Small Groups Offered	2	*	*	*	*	*				*	*	*	
Financial Seminar	3	*	*	*	*						*		
Cong 40 Days Generosity Focus	5	*	*	*	*	*				*	*	*	
Stewardship Campaign or Pledges	42	*	*	*	*	*				*	*	*	
Estate Planning Seminar	8	*	*	*	*	*				*	*	*	
Incorporate in membership class	7	*	*	*	*	*				*	*	*	
\$ Tracts/flyers in lobby or mailed	9	*	*	*	*	*	*	*	*	*	*	*	*
Children's Curriculum	6	*	*	*	*	*				*	*	*	
Youth Curriculum	6	*	*	*	*	*				*	*	*	
PREACHING & WORSHIP													
Weekly generosity verse/slide	14	*	*	*	*	*	*	*	*	*	*	*	*
Preaching message or series	10	*	*	*	*	*				*	*	*	*
Giving testimonies (video or live)	12	*	*	*	*	*				*	*	*	*
Dramas	13	*	*	*	*	*				*	*	*	*
Video clips on \$	15	*	*	*	*	*				*	*	*	*
SHEPHERDING & COUNSELING													
Budget Counselors Trained/Available	16	*	*	*	*	*	*	*	*	*	*	*	*
Referral credit counseling agency	16	*	*	*	*	*	*	*	*	*	*	*	*
Benevolence Ministry	17	*	*	*	*	*	*	*	*	*	*	*	*
Career Guidance Help	18	*	*	*	*	*	*	*	*	*	*	*	*
Estate Planning Services	20												
Financial planning for staff	23	*	*	*	*	*	*	*	*	*	*	*	*
Ministry to gift of giving people	24	*	*	*	*	*	*	*	*	*	*	*	*
COLLECTIONS & ADMIN													
Benevolence offerings collected	17	*	*	*	*	*	*	*	*	*	*	*	*
Offering Envelopes offered or sent	25	*	*	*	*	*	*	*	*	*	*	*	*
EFT giving setup & offered	26	*	*	*	*	*	*	*	*	*	*	*	*
Online giving setup & offered	27	*	*	*	*	*	*	*	*	*	*	*	*
Stock brokerage acct setup & offered	28	*	*	*	*	*	*	*	*	*	*	*	*
Community (or denomination) foundation relationship offered	29	*	*	*	*	*	*	*	*	*	*	*	*
Annual confidential giving analysis	30	*	*	*	*	*	*	*	*	*	*	*	*
Financial info on church website	31	*	*	*	*	*	*	*	*	*	*	*	*
Review salary survey info	32									*	*		
List of pending projects needing funds	33	*	*	*	*	*	*	*	*	*	*	*	*
Send giving statements (3-6x/year)	34	*	*	*	*	*	*	*	*	*	*	*	*
Financial newsletter (3-6x/year)	35	*	*	*	*	*	*	*	*	*	*	*	*
\$ Info (& articles) bulletin & newsletter	37	*	*	*	*	*	*	*	*	*	*	*	*
Training for Pastors & Committee	38	*	*	*	*	*	*	*	*	*	*	*	*
Establish leader or Committee	40												
Written philosophies, practices, etc.	41												
CAMPAIGNS													
Annual stewardship or pledge drive	42									*	*	*	
90 Day Tithing Challenge Guarantee	43	*	*	*	*	*	*	*	*	*	*	*	*
Missions conference or faith promise	44			*	*	*	*	*	*	*	*	*	*
Building/Capital Fund Campaign	45	*	*	*	*	*	*	*	*	*	*	*	*
Other idea(s)													