

Curriculum Guide for Presentations on: ***Planning for the Future***

Goal: To inform treasury personnel of future plans, directions and strategic initiatives as appropriate.

This curriculum guide outlines topics that could be included in a presentation/discussion on planning for the future for the local conference or union. It is recognized that specific plans for organizations located around the world will differ. The listed topics are intended to be instructive and have been mentioned as areas of importance in focus groups with treasury personnel. Not all topics will fit every situation, and in some situations, additional topics should be considered. This presentation time should be seen as an opportunity for current administrators to share their strategic thinking with new, incoming administrators.

Possible Points to cover:

a. Resource management:

- I. What are the top mission priorities (no more than three) for the organization?
- II. What programs, projects, or expenditures could be discontinued/restructured in order to free up resources for new initiatives?
- III. What are the long-term self-support goals and strategies to maintain/increase the level of self-support?
- IV. What are the strategies for the transition of personnel and/or the termination of personnel?
- V. What are the plans for succession planning and in particular, to train and prepare future leadership for organizational positions?
- VI. What improvements could be made in the annual budgeting cycle? Does the annual budget process make room for identification of future projects and needs that may not be part of the current year or the next budget period?

b. Resource development:

- i. What kind of feedback do church members receive regarding the use of resources, especially the use of funds received from special appeals?
- ii. Do church members clearly understand the tithes and offering plan in use by the conference?
- iii. What could/should the conference do to ensure that its stewardship program adequately educates church members in the principles and practices of systematic giving?
- iv. What are the projected needs for capital to provide for church/office/institutional buildings and equipment?
- v. What are the plans/budgets for continuing education for personnel, including assistance in learning about the latest leadership practices?

- vi. What are the plans/budgets for business internships and other opportunities for obtaining younger personnel in the financial areas of the organization?
 - vii. What are the plans/budgets for training local church treasurers (and pastors) in the handling/recording/receipting/forwarding of funds provided through the tithes and offering collections systems?
- c. Staff assignments and workflow:
- i. What efficiencies/challenges would be experienced by increased use of technology?
 - ii. Is the office space and workflow designed for maximum efficiency?
 - iii. Is the workload for treasury personnel properly balanced?
 - iv. Are all job descriptions appropriate and up-to-date?
 - v. Are appropriate tools available for reducing conflicts of interest that arise on the job?