

Episcopal Diocese of Oregon

Draft Process and Timeline for the 2023 Budget Cycle

[Note the 2023 budget is generated in 2022, so the timeline is for activities in late 2021 and all of 2022.]

Activity	Responsible person/group	Date/Deadline	Notes
Send draft 2023 Process and Timeline to Project and Budget Committee	Budget Committee Convener	Dec 1, 2021	
COUNCIL MEETS		Dec 4, 2021	
Budget Committee orientation. Discuss and approve draft 2023 Process and Timeline. Discuss and approve budget application forms.	Budget Committee/ Controller	Dec 4, 2021	
Publish 2023 Process and Timeline on diocesan web site	Controller/ Communication	Dec 15, 2021	
Detailed planning: application forms, preliminary planning of interview teams, interview questions.	Budget Committee	Feb 12, 2022	Zoom meeting (possibly joint with Mission and Ministry?)
Email to all Churches and Ministries and post on the diocesan website: budget process and timeline, budget template, and application forms	Finance	Feb 15, 2022	
Send email reminder to all Churches and Ministries about application deadline	Finance	Mar 15, 2022	
COUNCIL MEETS		Mar 12, 2022	
Meet to discuss teams and assign to existing and anticipated applications.	Budget/Mission and Ministry committees	Mar 12, 2022	
Deadline for 2023 budget request submissions	Churches & Ministries	Apr 4, 2022	Critical Milestone
EASTER WEEK		Apr 11-17, 2022	
Final assignments of applications to interview teams	Budget Committee Convener and Controller	Apr 6, 2022	
Budget and Mission and Ministry teams conduct interviews with applicants as needed	Budget/Mission and Ministry Committees	Apr 6– May 10, 2022	
Interview team leaders submit Budget proposals and narratives to Controller	Team Leaders	May 16, 2022	

Prepare a preliminary diocesan budget and narrative for consideration by Budget Committee	Controller/Budget Committee Convener	May 16–Jun 1, 2022	
Send preliminary budget and narrative to Budget Committee	Controller	Jun 1, 2022	
Send out a preliminary diocesan budget and narrative for consideration by Diocesan Council	Controller	Jun 6, 2022	
COUNCIL MEETS		Jun 11, 2022	
Budget Committee requests approval of the preliminary budget and narrative by Diocesan Council	Budget Committee Convener	Jun 11, 2022	
Preliminary budget sent to Convocation Deans and Presidents	Controller	Jun 15, 2020	Critical Milestone
Convocations provide feedback on the preliminary budget to the Budget Committee and Controller	Convocation Deans & Presidents	Aug 15, 2022	Critical Milestone
Budget and narrative edited if needed	Controller/Budget Committee Convener	Aug 15-24, 2022	
Send final proposed budget and narrative to Budget Committee for feedback	Budget Committee Convener	Aug 24, 2022	
Send final proposed budget and narrative to Diocesan Council for feedback	Controller	Sep 6, 2022	
COUNCIL MEETS		Sep 10, 2022,	
Present final proposed budget and narrative to Diocesan Council for approval	Budget Committee Convener	Sep 10, 2022	
Proposed Budget and narrative published 45 days prior to Convention per Canon 5.1, Section 1.	Controller/Communication	Sep 13, 2022	Critical Milestone
DIOCESAN CONVENTION		Oct 28-29, 2022	
Budget Committee convener presents budget to Diocesan Convention for final approval	Budget Committee Convener	Oct 28-29, 2022	
Develop Process and Timeline for the (2024) Budget	Controller/Budget Committee Convener	Nov ?? 2022	
COUNCIL MEETS		Dec 17, 2022	
Approve Process and Timeline for the (2024) Budget. Committee Introductions.	Budget Committee	Dec 17, 2022	
Publish Process and Timeline for the (2024) Budget	Controller/Communication	Dec 20, 2022	