

STEWARDSHIP AND ENGAGEMENT ACTION PLAN

Our roadmap to achieve the strategic goals for the Stewardship, Ministry Engagement, and Planned Giving Ministry (SMEPG).

Steps	Lead	Timeline	Completion Goal
Goal #1: Research Effective Stewardship and Engagement Programs -within 3 months			
1. Form Stewardship & Engagement Ministry Team (S&EMT)	SPT & S&EMT Co-Captains	1 month after start	Team members confirmed
2. Define key terms and success metrics for stewardship, tithing, ministry engagement, and planned giving	S&EMT	1 month after step #1	Definitions and metrics completed
3. Review parish baselines and analyze obstacles to areas listed in step 2.	S&EMT	1 month after step #2	Baselines and impediments finalized
4. Research 2–3 best-practice examples for stewardship, engagement, percentage giving, and planned giving	S&EMT	Concurrent with steps #2–3	Best-practice options identified
Goal #2: Develop Effective Stewardship and Engagement Programs - within 3 months			
5. Evaluate researched programs using effectiveness metrics and baselines	S&EMT	1 month after step #4	Evaluation completed
6. Finalize SMEPG Ministry; establish monthly benchmarks / communications	S&EMT	2 months after step #5	Programs and benchmarks finalized
Goal #3: Recruit and Train Stewardship Ambassadors - within 2 months			
7. Identify and recruit Ambassadors to implement the SMEPG Ministry	S&EMT	1 month after step #6	Ambassadors recruited
8. Train Ambassadors to implement all aspects of the SMEPG Ministry	S&EMT	1 month after step #7	Ambassadors trained
Goal #4: Implement Program to Achieve Targets – within 24 months			
9. Implement SMEPG Ministry	Ambassadors	Over 24 mo. after step #8	Programs fully launched
10. Track monthly benchmarks and continue Ambassador follow-ups	Ambassadors	Concurrent with step #9	Monthly targets achieved
Goal #5: Program Assessment – within 2 months			
11. Compile/assess qualitative and quantitative program data per step #2; identify improvements	Ambassadors and S&EMT	1 month after step #10	Assessments complete
12. Deliver analysis report; implement refinements	Ambassadors and S&EMT	1 month after step #11	Analysis complete; program refined