

SINAI TEMPLE FINANCIAL OBLIGATION TIMELINE

Approved by Finance Committee on 5/4/15 and accepted by Board on 5/11/15

- June 15 Send out initial pledge letter/form, asking to make a pledge and pay/make arrangements by Sept. 1.*
- July 1 First day of the fiscal year
- August Bd mtg 1.Financial Secretary reports to the Board who did not make a pledge last fiscal year.* 2.Treasurer makes sure that the prior fiscal year books are closed.
3.Educator and Rabbi report what members have life-cycle events this fiscal year.
- Nov. 1 Financial Secretary determines who has not made a pledge or made arrangements for the current fiscal year (and/or last fiscal year)*
- Nov. 15 Send out second pledge letter/form.
- Jan. Bd mtg Financial Secretary reports to the Board who has not made pledges.*
- Jan. 15 Send out post-card reminder to pledge.
- Feb Fin mtg Finance committee reviews members not in good standing.**
- a. For members who have not pledged for the current fiscal year ONLY:
Determine whether to call them or offer financial assistance
 - b. For members who have not pledged for the current fiscal year AND the past fiscal year:
Determine whether to call them, send them a firm letter or offer financial assistance.
 - c. For members who have not pledged for the current fiscal year AND the past TWO fiscal year:
Send them a firm letter asking to fulfill a pledge by May 30 or risk being taken off the membership roll in June. Letter should be sent certified mail, return receipt requested.
- June Bd mtg Board should consider voting to take off the membership roll those members who have not made pledges this year or the past two fiscal years.

*Procedure previously established by temple bylaws

**Procedure previously established by board vote