

# Congregational Leadership Training

## Management and Finance

These four learning events will help pastors and lay leaders improve their administrative and management skills. Each session is on a Saturday morning from 9:00-12:00. There is no fee, but we ask that attendees notify the office of their intent to come so we can plan for sufficient handouts and seating. Please email [john\\_litke@iee.org](mailto:john_litke@iee.org) or [spbs.spbc@gmail.com](mailto:spbs.spbc@gmail.com) to leave word if you plan to attend

### Introduction to Congregational Finance - October 20, 2018

A basic overview on the principles and practice of congregational finances, including non-profit style books and records, managing restricted (or designated) giving, proper organization of the Treasury and Financial Secretary offices, and a synopsis of tax reports and audits for congregations. This is basic information that every board member should know and the course is particularly suitable for new congregation officers and council members and anyone that wants to improve their church management skills. This event will be held at St. Paul's Lutheran Church, 761 King Street, Rye Brook.

### Congregations and Responsible Governance – November 17, 2018

An introduction to the congregation's responsibilities to the government, a review of the obligations of the Board of Directors (congregation council) under the state non-profit law and a review of payroll and tax issues. The session will provide guidance for property and capital issues such as management, maintenance, insurance, risk management, and capital improvements. Particularly suitable for congregational officers. This event will be held at St. Paul's Lutheran Church, 761 King Street, Rye Brook.

### Planning, Budgeting and Managing – February 23, 2019

An introduction to the planning and budgeting process for congregations, including setting a vision, planning for people, space and financial resources, and constructing and using strategic and tactical budgets. A critical resource for a congregation is people, so we will also discuss designing an organization for the available skills, staffing a congregation, training of volunteers and lay leaders and related issues. Particularly suitable for congregational leadership. This event will be held at St. John's Lutheran Church, 55 Wilbur Road, Poughkeepsie.

### Congregational Audit – March 23 2019

Good management requires periodic audits of an organization's activities, of which financial audits are one example. This workshop will review the nature and intent of a spectrum of audits, including financial, building, insurance, risk, and program audits. Sample audit guidelines will be provided for audit procedures that can be done by volunteers. Attendees should have a basic familiarity with congregational strategic planning. This event will be held at St. John's Lutheran Church, 55 Wilbur Road, Poughkeepsie.