



Church Training Center  
*Cultivating Effective Leadership*

Keith@ChurchTrainingCenter.com  
www.ChurchTrainingCenter.com



*Securing Resources for Ministry*

13533 Starflower Street  
Eastvale, CA 92880-7283  
(626) 657-0146

## Course Syllabus

### Building Financial Policies and Procedures: Tailoring Church Financial Guidelines to Your Context

**Course Duration:** 9 weeks (9 one-hour sessions)

#### Course Description:

This training program aims to equip church leaders with a structured process for developing financial policies and procedures that align with their church's unique setting, polity, ethos, and structure. Participants will learn the importance of financial policies and procedures, engage in a process to discern and define these policies specific to their church setting, understand the intent and purpose behind these guidelines, clarify responsibilities, and cover key areas in a financial policies and procedures manual.

Each session is designed to be dialogical in nature. Some will begin with a PowerPoint presentation followed by group discussion. Others will be group discussions facilitated by the course facilitator.

**Facilitator:** Keith Clark-Hoyos

#### Session 1: The Process and Defining Policies and Procedures

- Introduction to the importance of financial policies and procedures
- Defining the process of establishing church-specific financial guidelines
- Differentiating between policies and procedures

#### Session 2: Purpose and Intent

- Clarifying the intent and purpose of financial policies and procedures
- Aligning financial guidelines with the church's mission and values
- Crafting policy statements reflective of the church's ethos

#### Session 3: Responsibilities

- Identifying and defining the roles and responsibilities related to financial policies and procedures

- Ensuring accountability and oversight in the implementation of guidelines

#### **Session 4: Chart of Accounts & Critical Documents**

- Understanding the chart of accounts and its significance in financial management
- Identifying critical documents necessary for accurate financial recording and reporting

#### **Session 5: Cash Receipts**

- Establishing guidelines for handling and recording cash receipts
- Ensuring transparency and accuracy in cash handling procedures

#### **Session 6: Cash Management**

- Policies and procedures related to cash management and internal controls
- Strategies for effective cash management to support the church's financial health

#### **Session 7: Cash Disbursement**

- Establishing controls and processes for cash disbursement
- Ensuring proper authorization and documentation for disbursements

#### **Session 8: Other Assets**

- Managing and safeguarding non-cash assets
- Defining policies for managing and protecting other church assets

#### **Session 9: Budgeting**

- Integrating budgeting guidelines into the financial policies and procedures manual
- Ensuring alignment of the budgeting process with the church's mission and vision

#### **Course Materials:**

Each session will be dialogical in nature. Some PowerPoint presentations will be made and the slides will be distributed after the discussion.

Participants are encouraged to bring their church's Articles of Incorporation, Bylaws and current financial policies and procedure documents for reference.

### Assessment and Grading:

This cohort is a voluntary participation training available to those who choose to increase their knowledge and skills in serving the church. No written exam is required.