**Overview:**

The program is an independent (at home) study program that will be of particular interest to treasurers, assistant treasurers, finance committee members, and audit committee members

**Objective:**

To develop/test treasury knowledge to benefit students and congregations.

**Enrollment Application:**

The enrollment application is due to the diocesan treasurer by March 31st.

**Technology**

All aspects of communication and course work are conducted electronically. Therefore, students must have sufficient skill and electronic capability including e-mail, the internet, Acrobat, MS Word and Excel.

**Presentation -** The program is presented as follows:

**Open Book Exam (1 unit)**

A completed open book exam is due by October 31st.

**Process improvement implementation report (1 unit)**

A completed report is due by October 31st.

**Certificate and Award**

Students successfully completing both units will be awarded a Certificate during the Diocesan Convention.

 **Other Program Materials and Information**

Application form – page 2

Report of Process Improvement Implementation form – page 3

Church Business Process Improvement defined – page 4

Process Improvement - processes to consider – page 4

Curriculum Materials – page 4

Estimated completion time – page 4

Program Oversight – page 4

Application\*

Certified Church Treasurer Program

Applicant Name

Address

Phone number

e-mail

I have been a member of the following Congregation for years

My Process Improvement Proposal (10 words or less) is:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Applicant Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Warden Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clergy Signature Date

Send your application and make inquiries to:

Episcopal Diocese of Chicago

Keith Kampert

kkampert@episcopalchicago.org

Treasurer

65 East Huron Street

Chicago, IL 60611-2728

312.751.4201 Office

312.787.5872 Fax

**\*must be received by March 31st.**

Certified Church Treasurer Program

Report of Process Improvement Implementation

The Church Business Process Improvement Proposed (as described in the application)

The Process Improvement implemented (describe below):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student Signature Date

From your view, has the improvement described above, been successful?

Yes\_\_\_\_ No\_\_\_\_

Comments:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Warden Signature Date

From your view, has the improvement described above, been successful?

Yes\_\_\_\_ No\_\_\_\_

Comments:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Clergy Signature Date

**Church Business Process Improvement**

Process improvement is an action taken to identify, analyze and improve processes to reduce cost and improve performance.

**Processes** **to consider for improvement include**

Auditing

Bequests

Bookkeeping

Budgeting

Cash

Cash Management

Discretionary funds

Electronic Banking

Expenditures

Financial Statements

Financing

Investment management

Parochial Report

Payroll

Pledges

Receipts

Record Retention

Technology

Travel

**Curriculum Materials**

The Manual of Business Methods in Church Affairs; Audit Guide for Churches in the Diocese of Chicago; tax guide for Episcopal Churches; tax guide for Episcopal Ministers; diocesan Budget and Management Guidelines and the diocesan canons.

**Estimated Completion Time (in hours)**

Application 1-2

Open book exam 4-18

Process Improvement 5-18

Total 9 -38

**Program Oversight**

The diocesan treasurer will administer the program as formulated and is authorized to make revisions from time to time.